

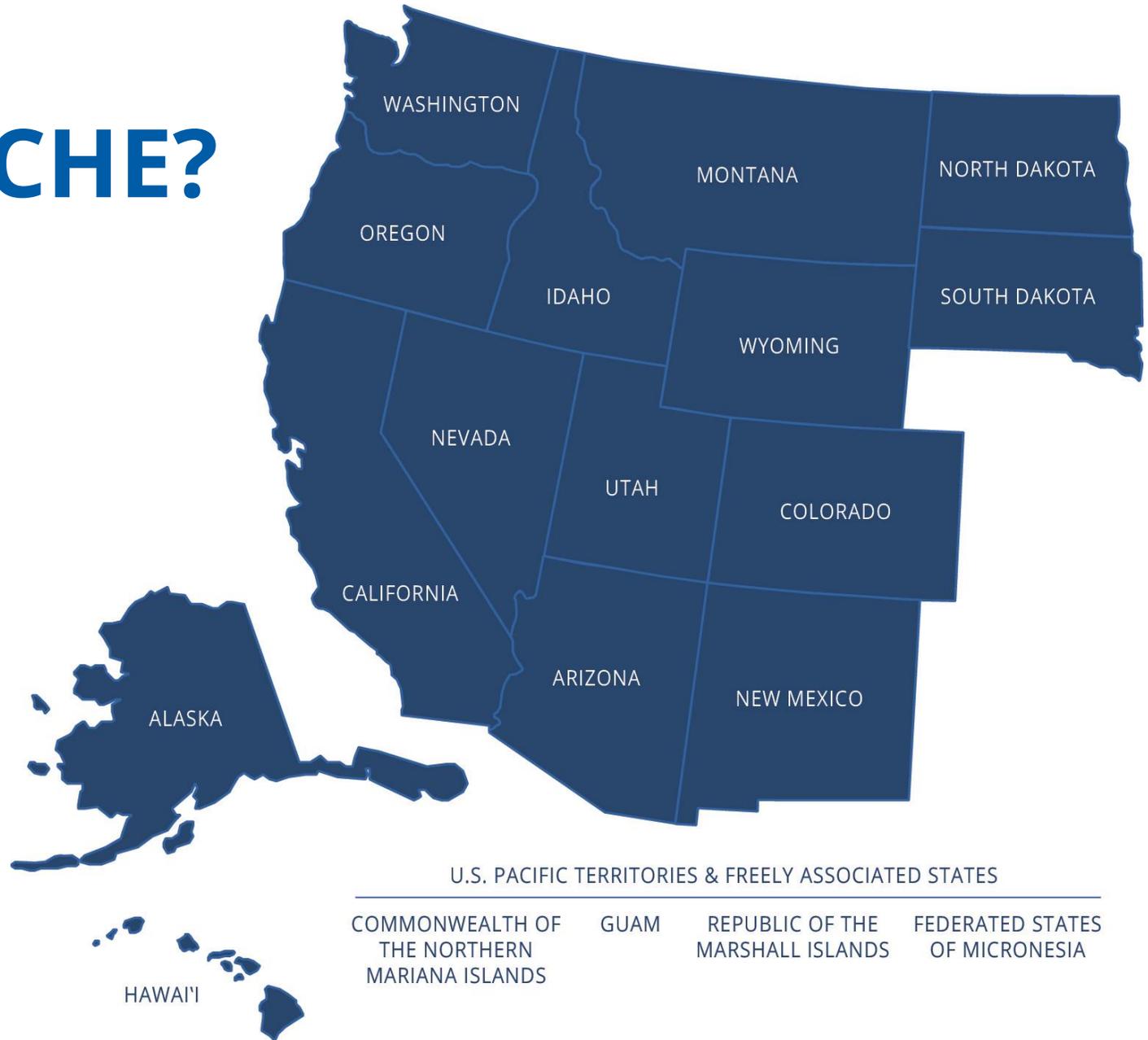
# Trends in Higher Education: Addressing Anticipated Realities Through Proactive Planning

Patrick Lane  
WICHE  
March 25, 2022

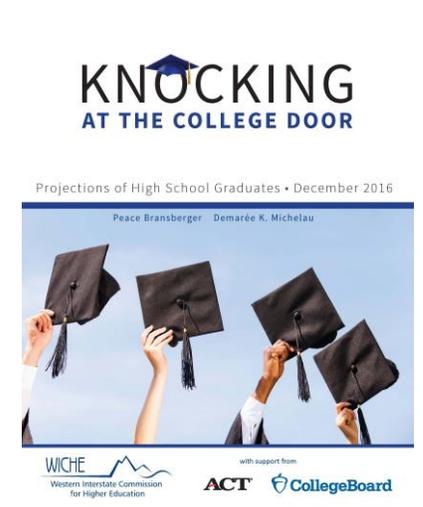
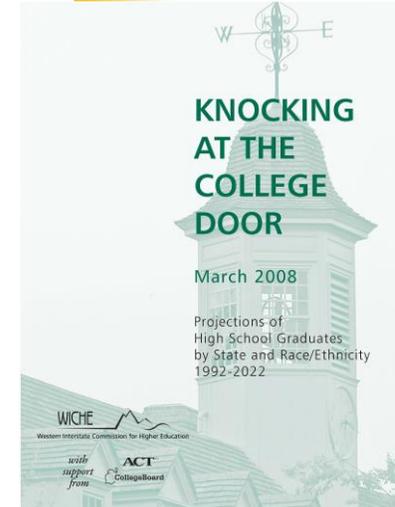
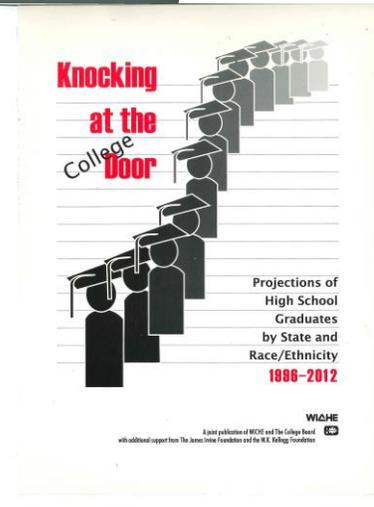
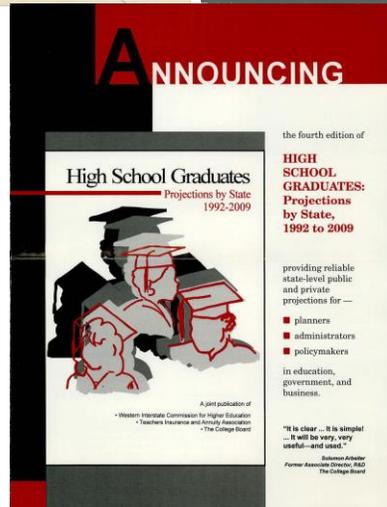
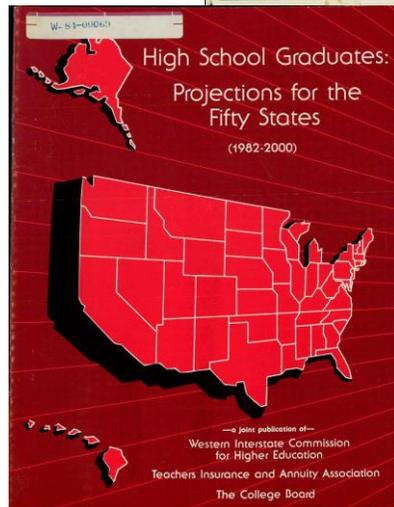
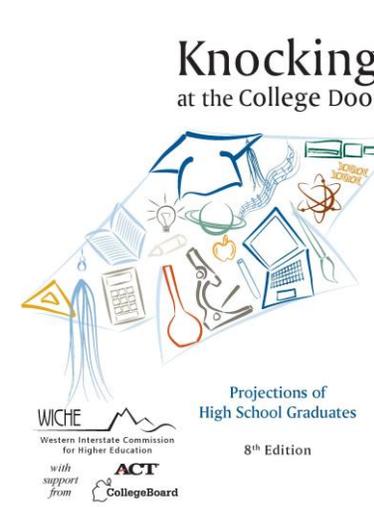
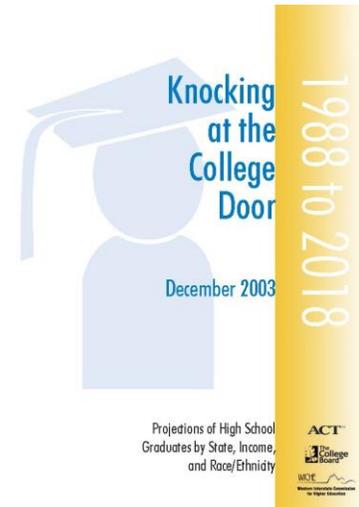
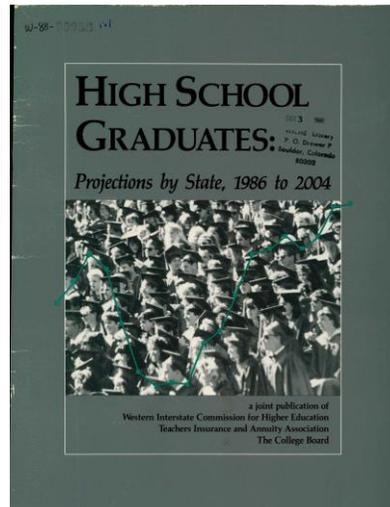
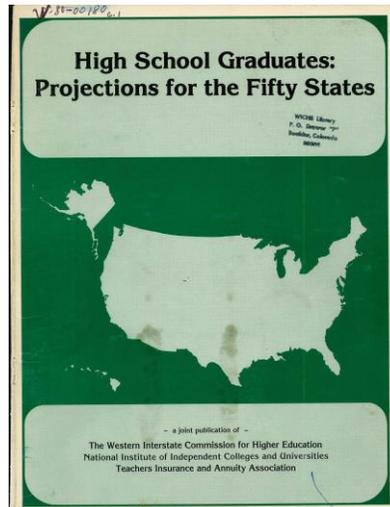
# What is WICHE?

WICHE and its 16 member states, territories, and freely associated states work collaboratively to expand educational access and excellence for all citizens of the West.

By promoting innovation, cooperation, resource sharing, and sound public policy, WICHE strengthens higher education's contributions to the region's social, economic, and civic life.



# Knocking at the College Door - History



# Presentation Overview

Demographic trends – High school graduates

Census data – Youth populations

NAST enrollment data

Pandemic trends

The crystal ball



**Will Half Of All Colleges Really  
Close In The Next Decade?**

**Colleges Set to Fight for  
Fewer Students**

**Will Your College Survive the Demographic Cliff?**

National trends are interesting – but enrolling students is a local challenge.

**The Upside of the Downward  
Trend in College Enrollment**

# High School Graduate Projections



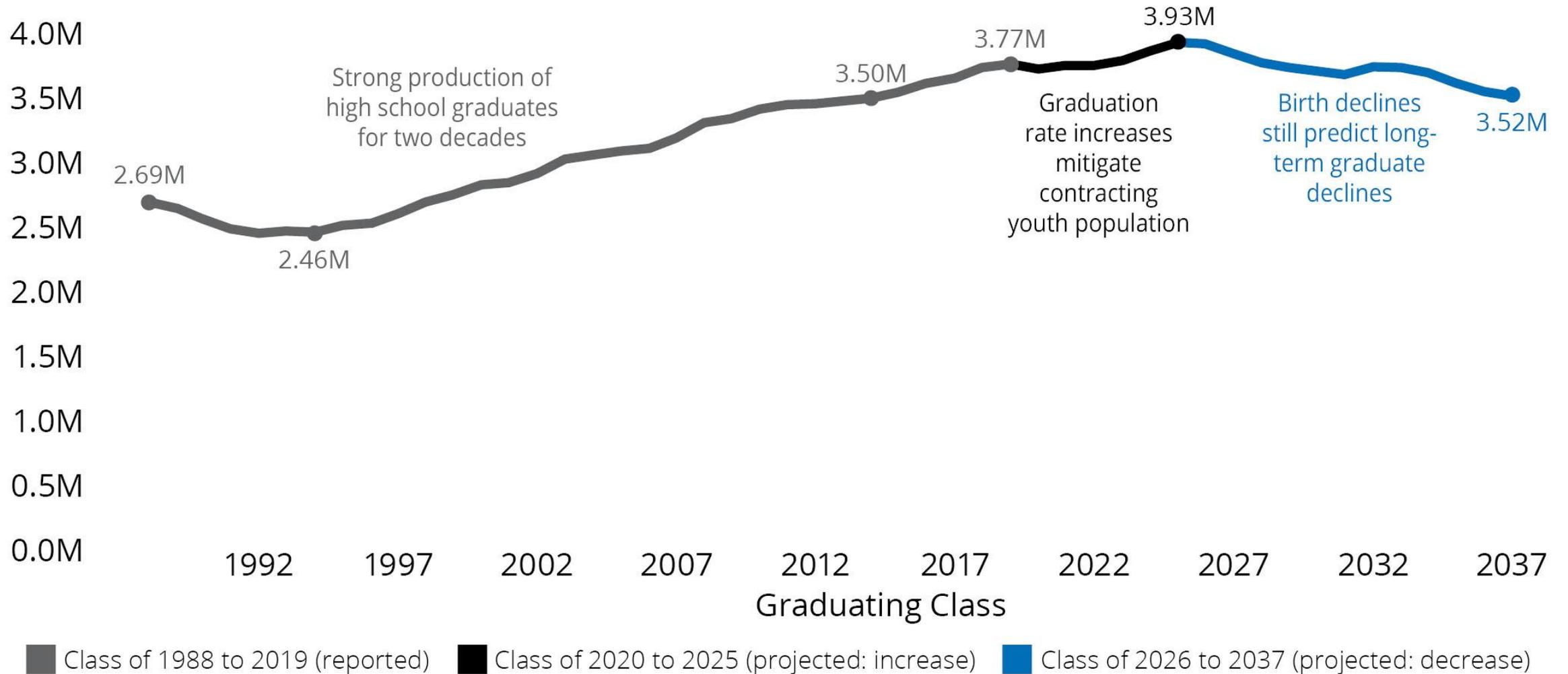
# Four Key Themes

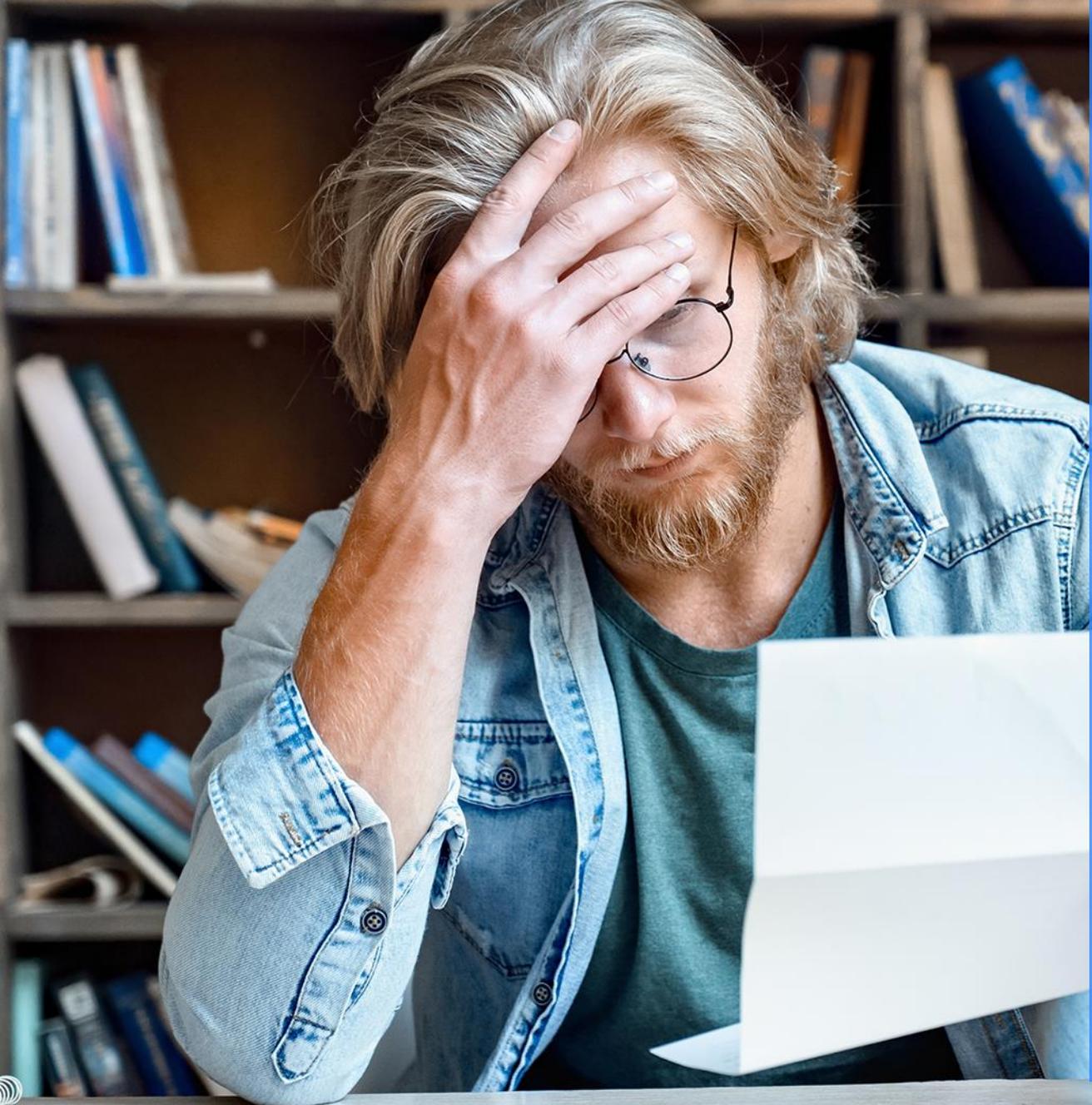
1. Modest growth, then decline
2. Increasing diversification of high school graduates
3. State and regional variation
4. COVID-19 implications

# COVID-19 Caveats and Warnings

- Main models built on data through H.S. Class of 2019
- COVID-19 likely to have significant and long-lasting impacts on education pathways
- WICHE is updating as new data become available

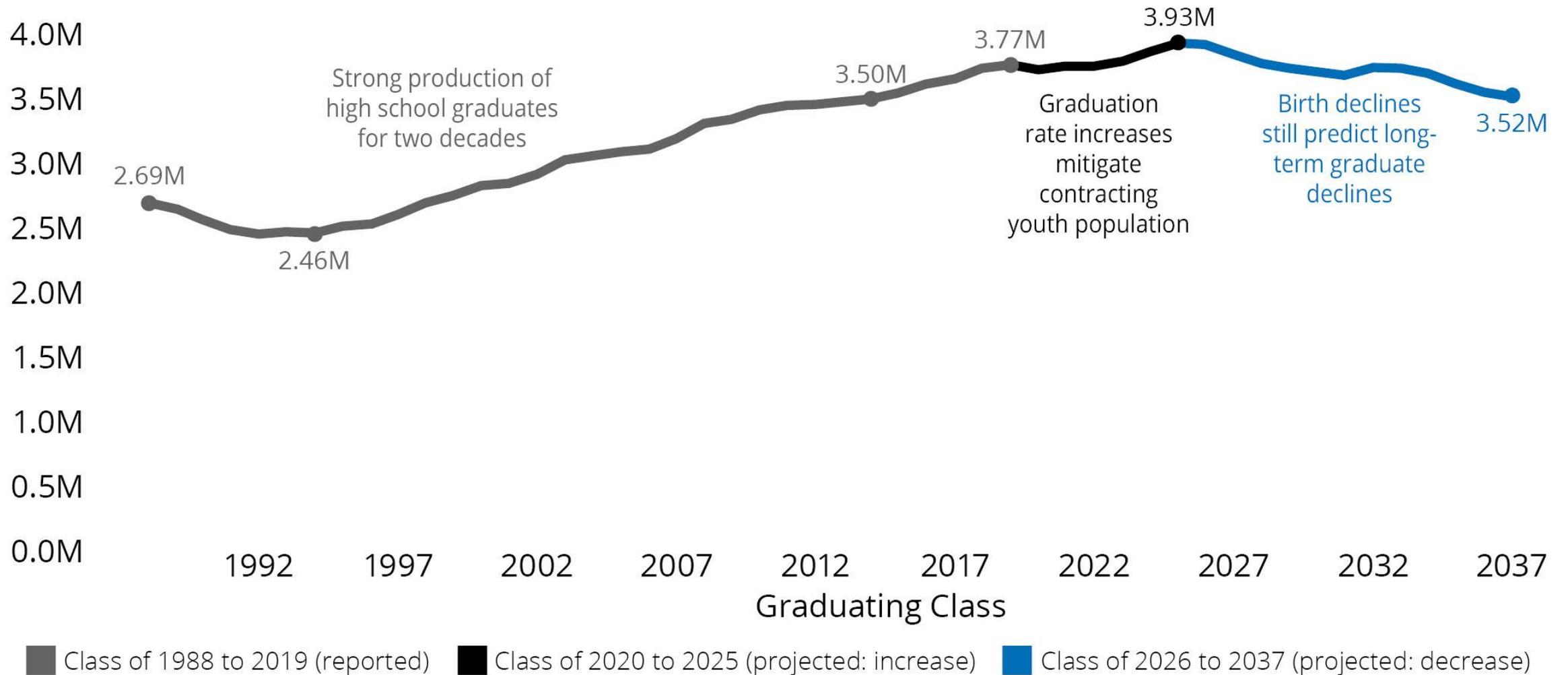
# Modest Growth, then Decline





# Methodological Interlude

# Modest Growth, then Decline

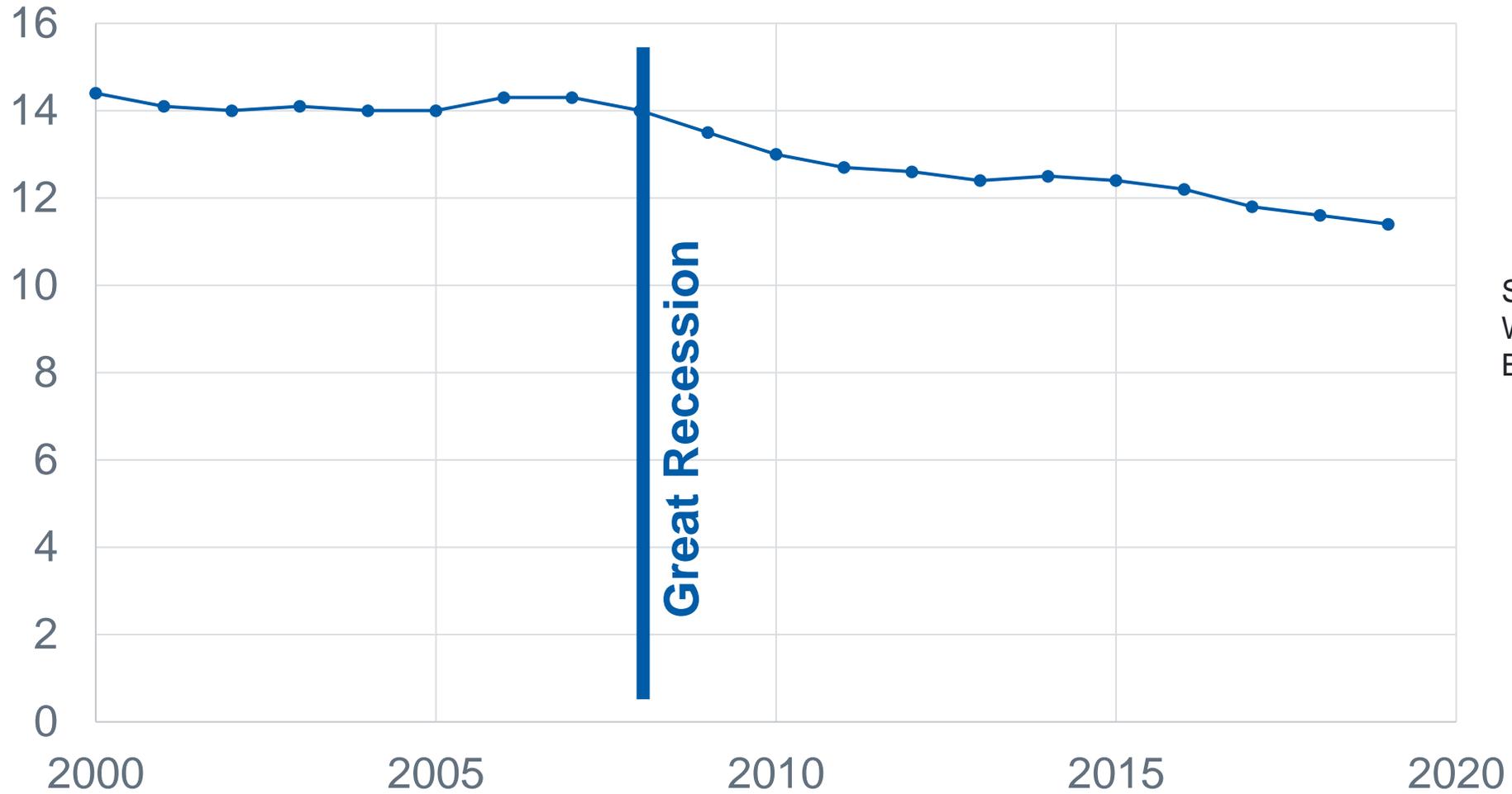


# What's driving this trend?



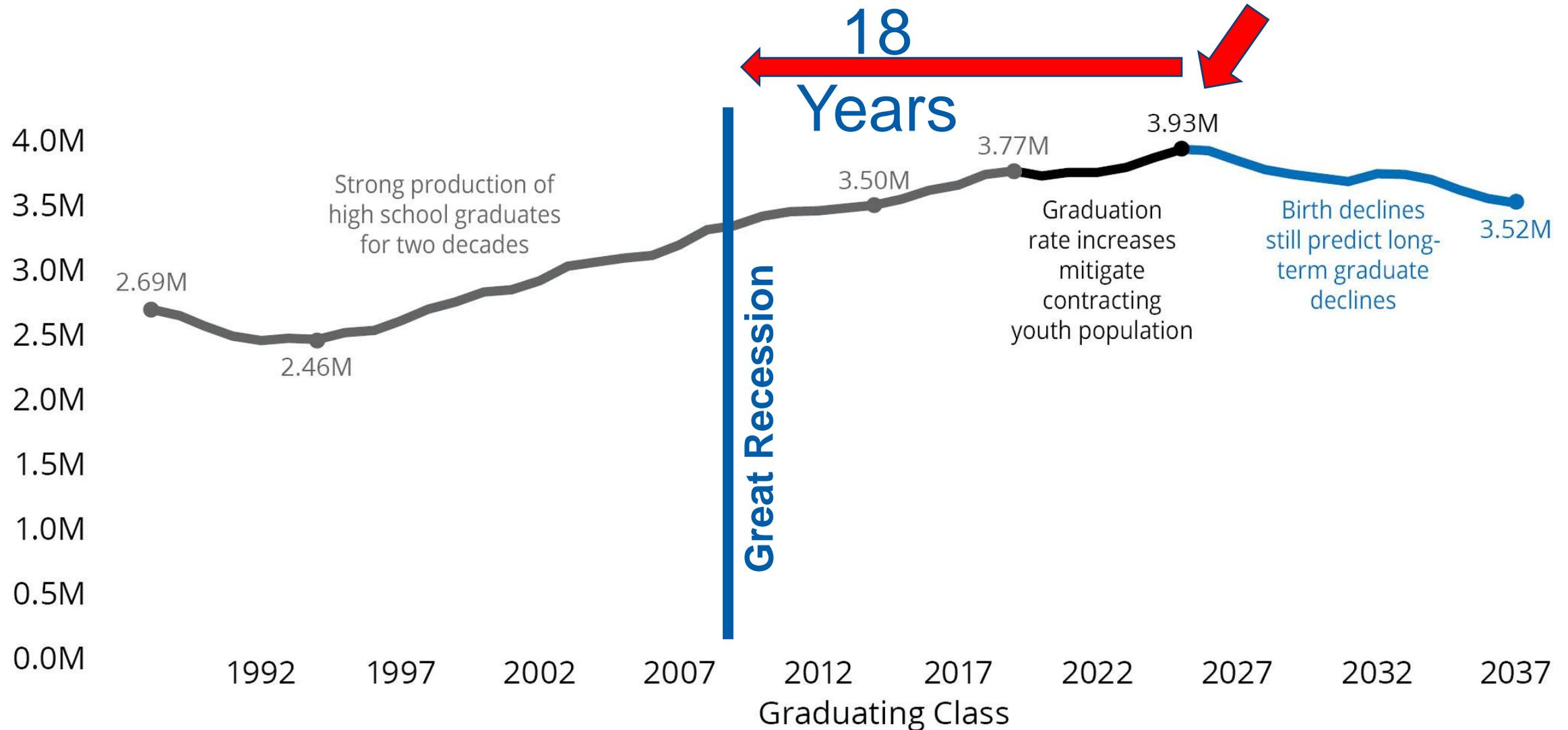
Source: Gerber website

# U.S. Births per Thousand People



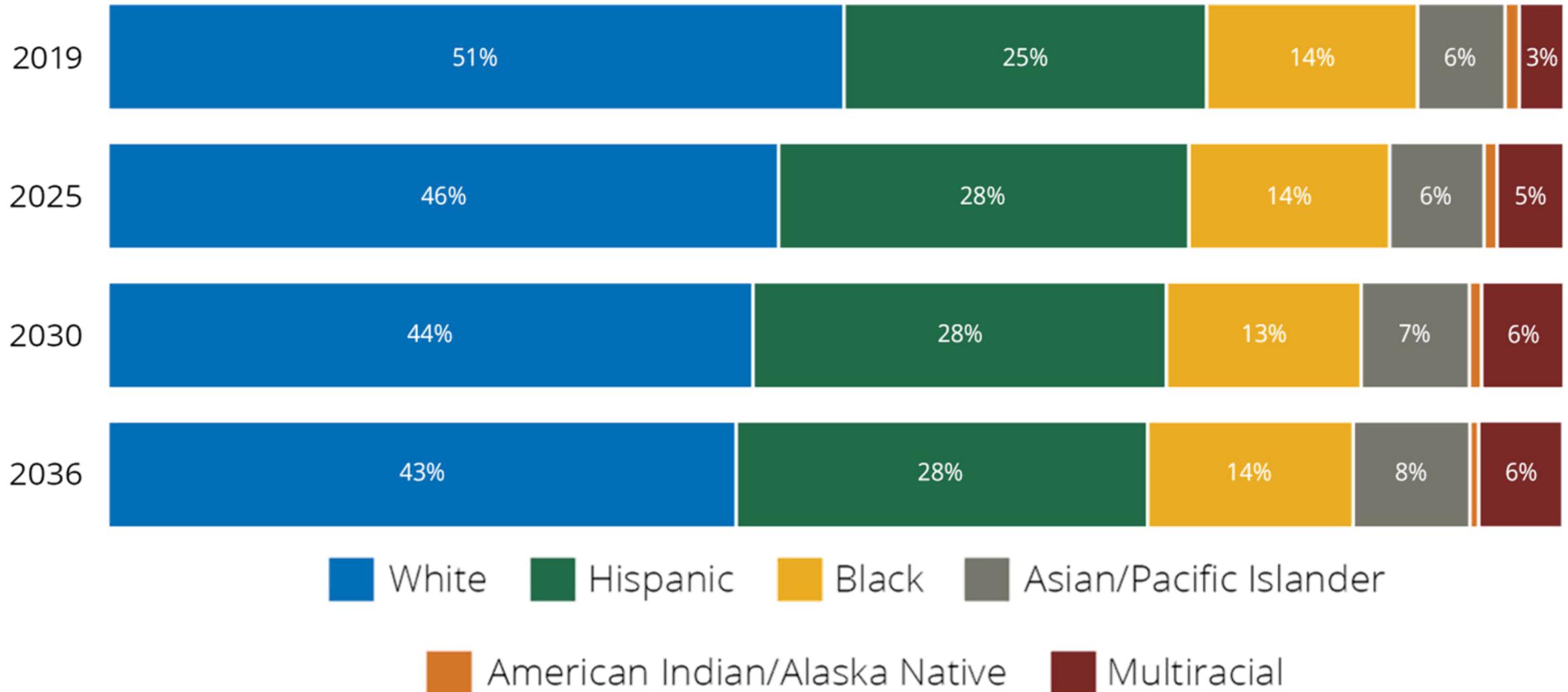
Source:  
World Bank, via Federal Reserve  
Bank of St. Louis

# Modest Growth, then Decline



■ Class of 1988 to 2019 (reported) ■ Class of 2020 to 2025 (projected: increase) ■ Class of 2026 to 2037 (projected: decrease)

# Projected Diversification of Graduating Classes



# Projected Change in Graduates vs. 2019

Two or More Races ▲ 81%

Asian/PI ▲ 24%

Hispanic ▲ 9%

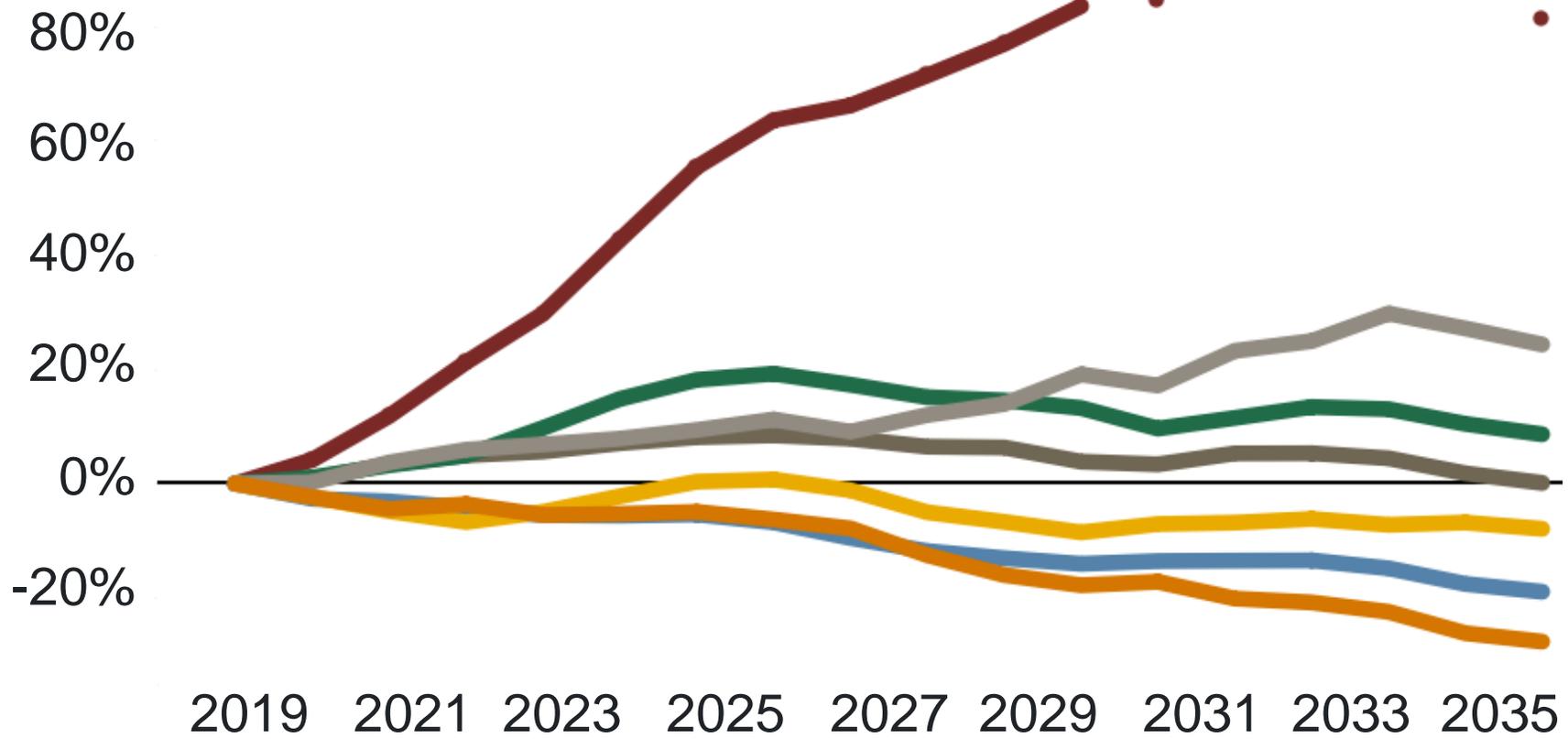
Private HS Grads ▲ 0%

Black ▼ -8%

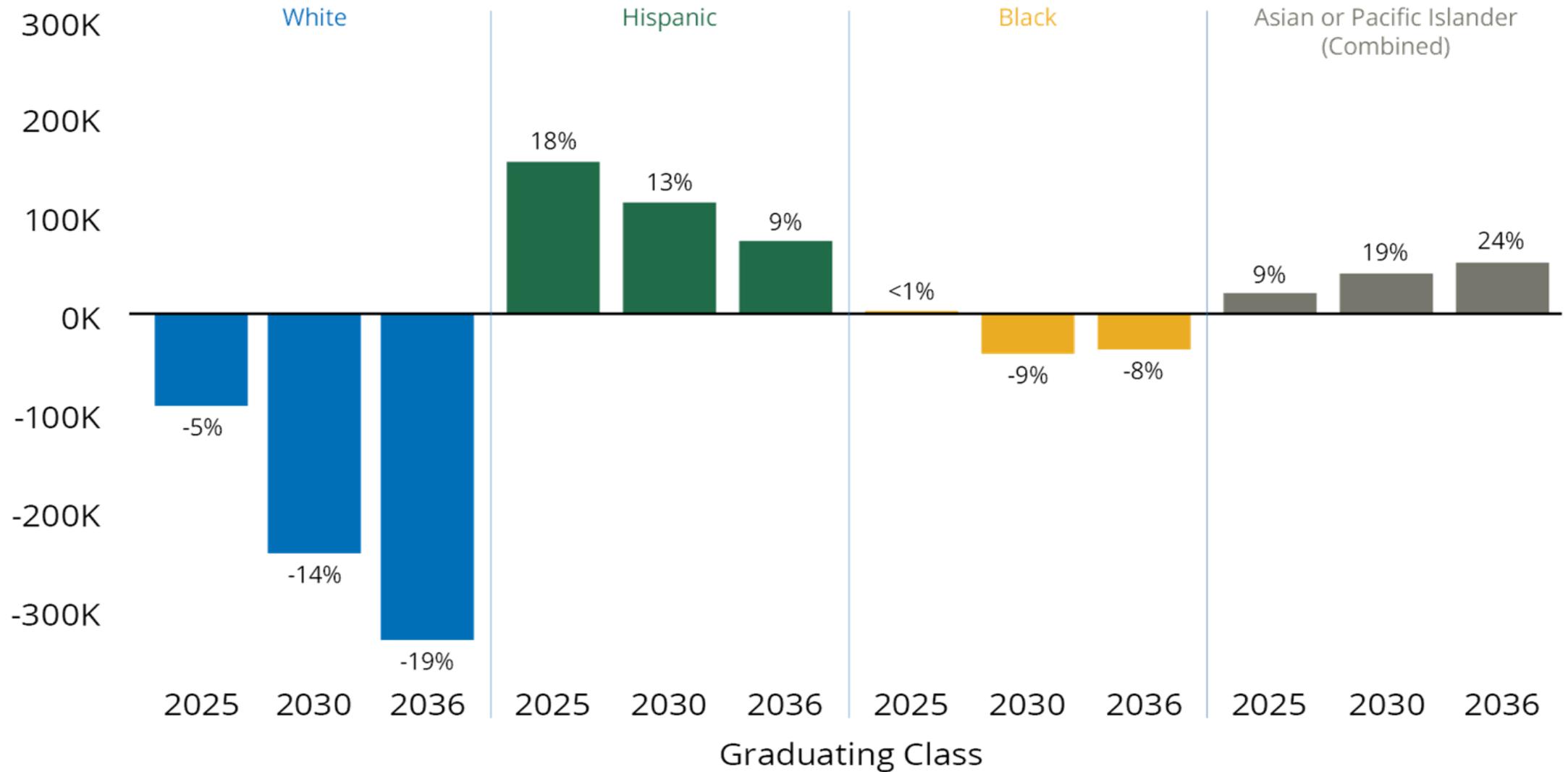
Public Schools Total ▼ -6%

AI/AN ▼ -28%

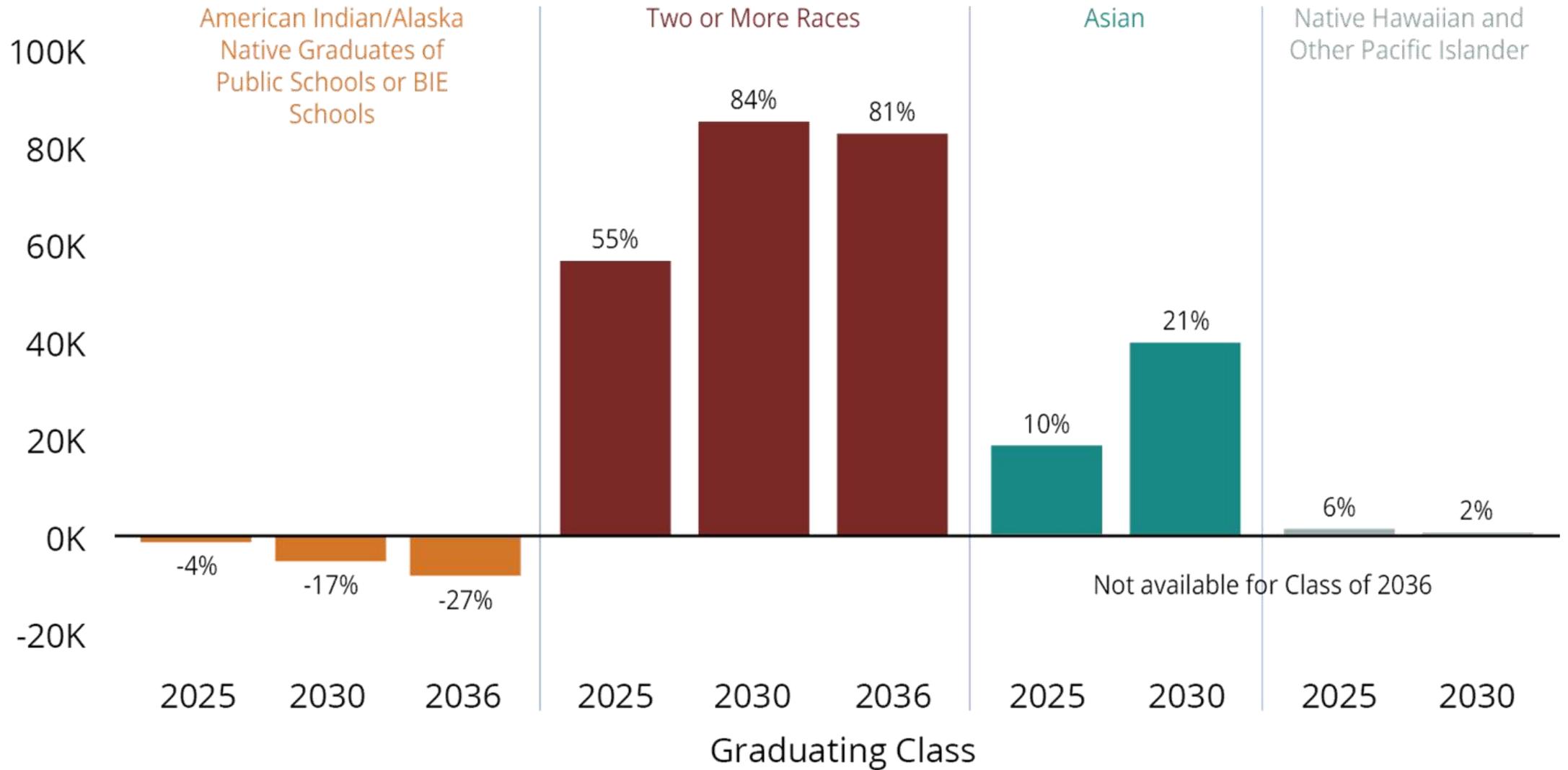
White ▼ -19%



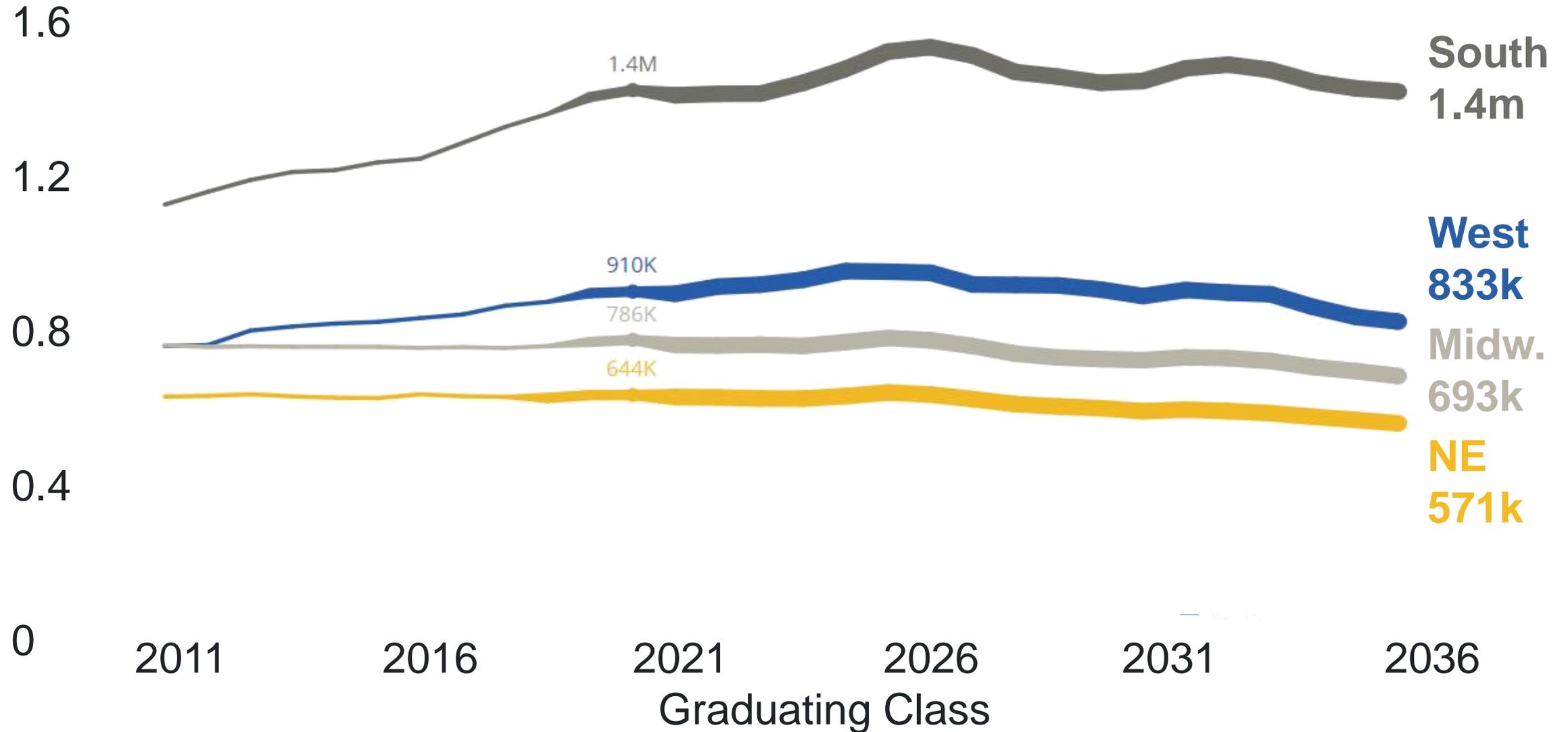
# Projected Change from 2019 by Race/Ethnicity



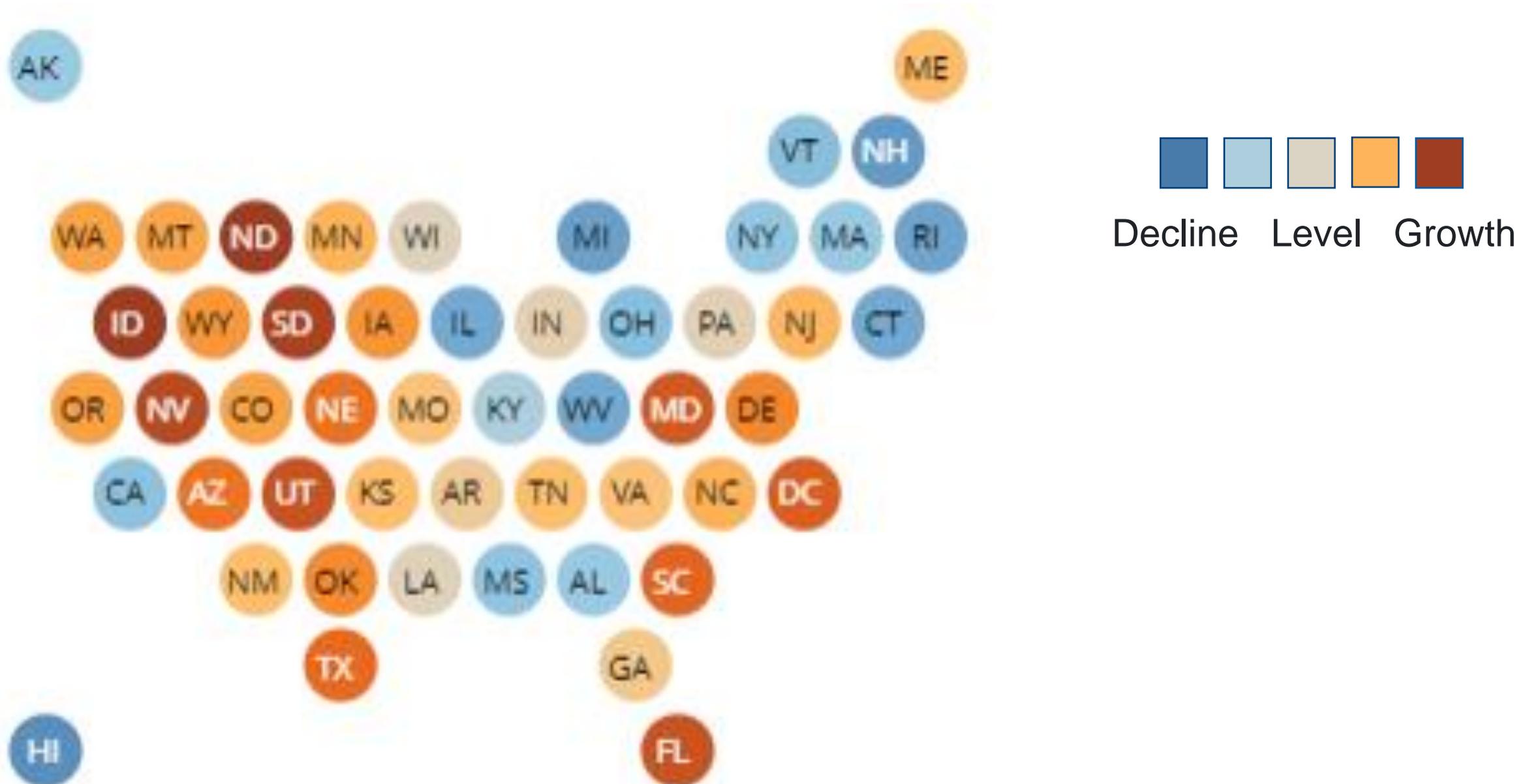
# Projected Change from 2019 by Race/Ethnicity



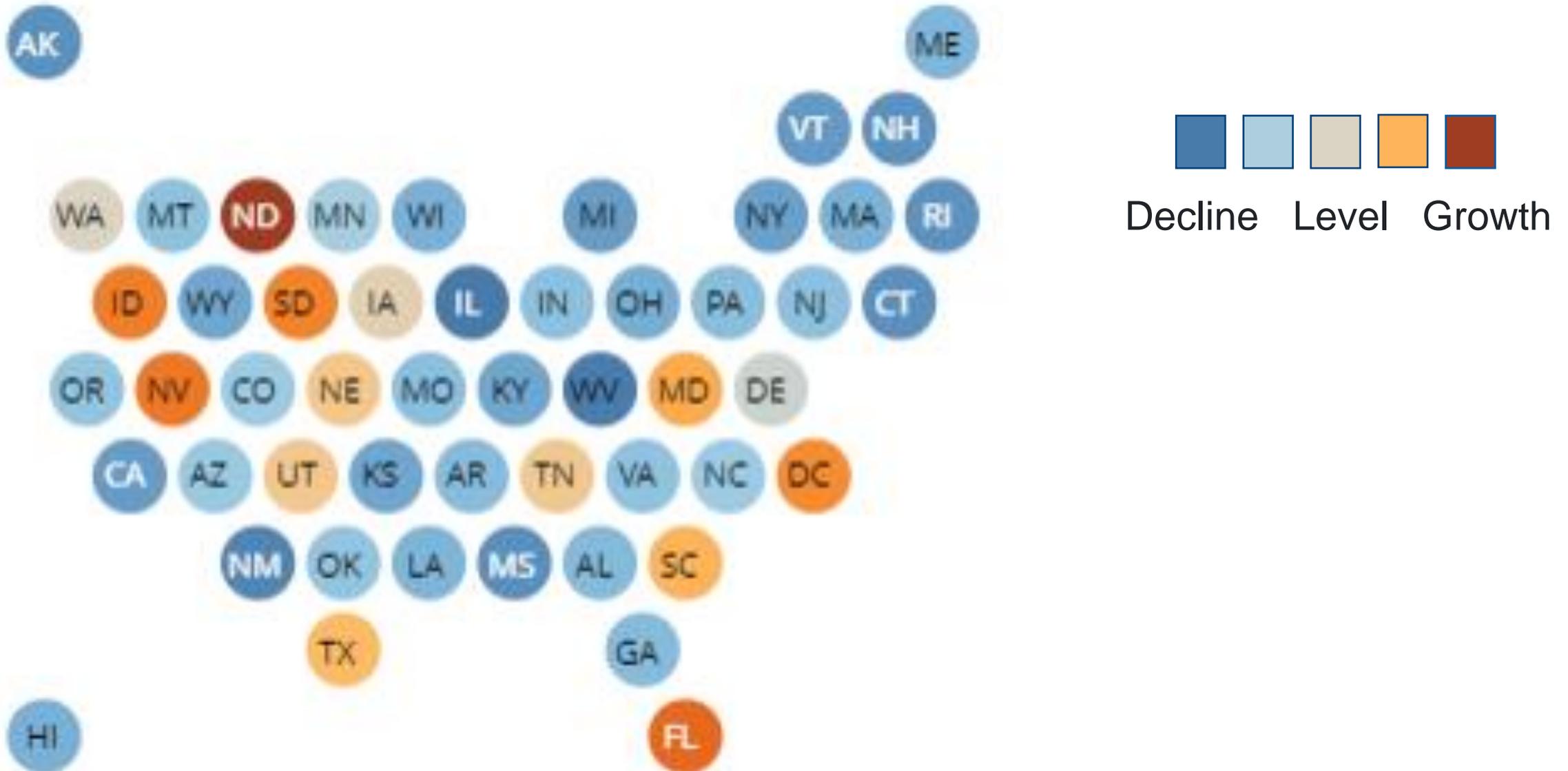
# Regional Variation



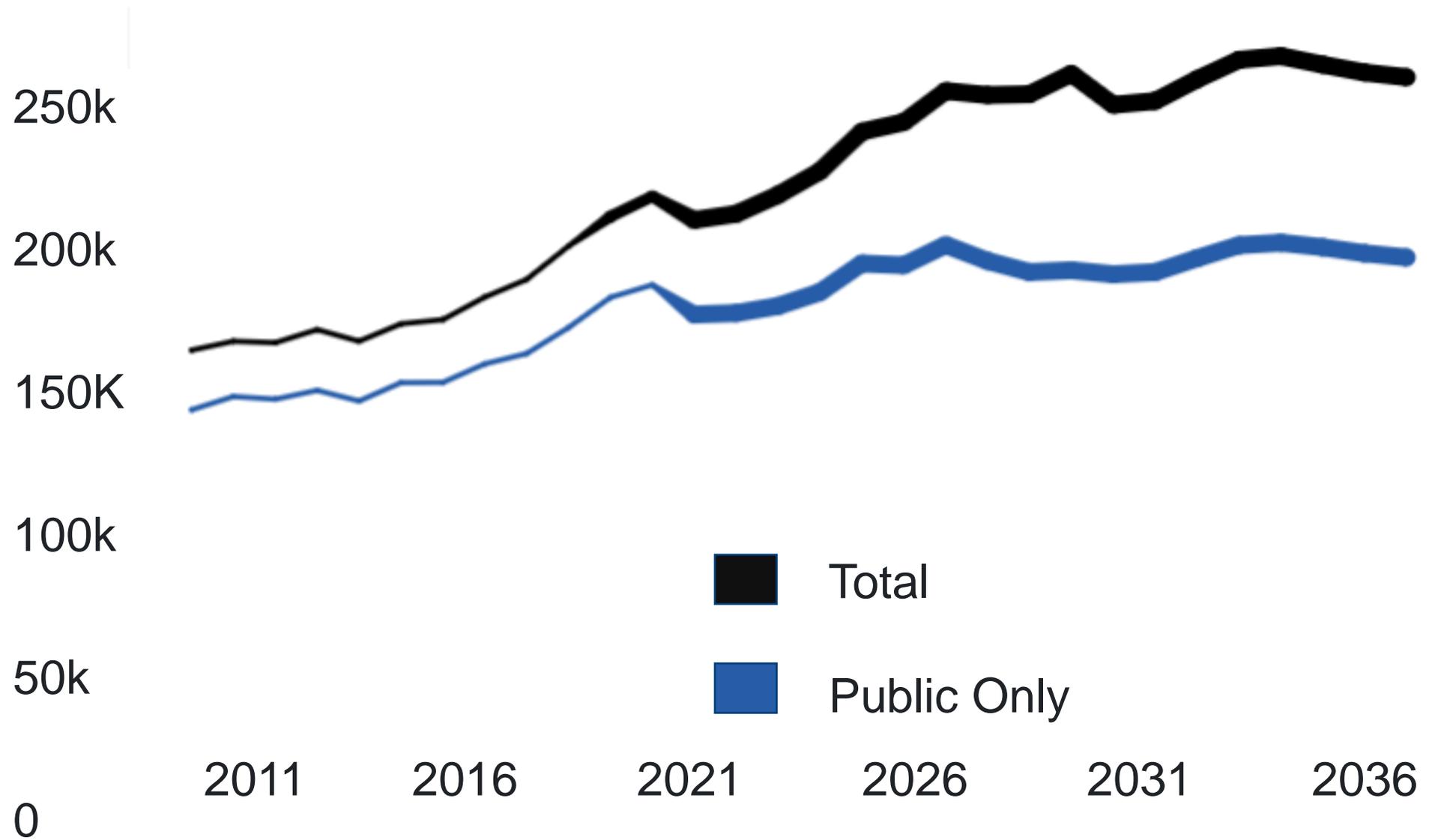
# State Variation - Pct change 2019-2027



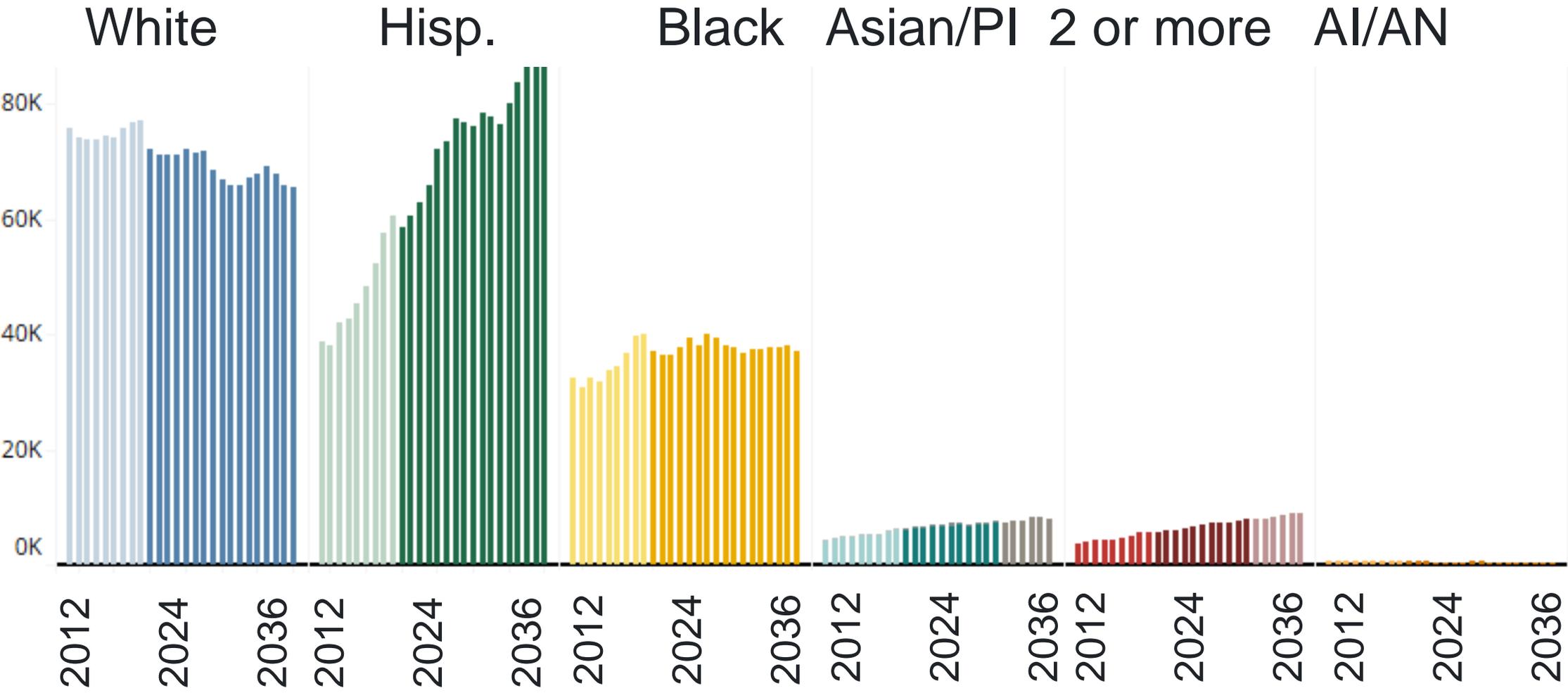
# State Variation - Pct change 2019-2037



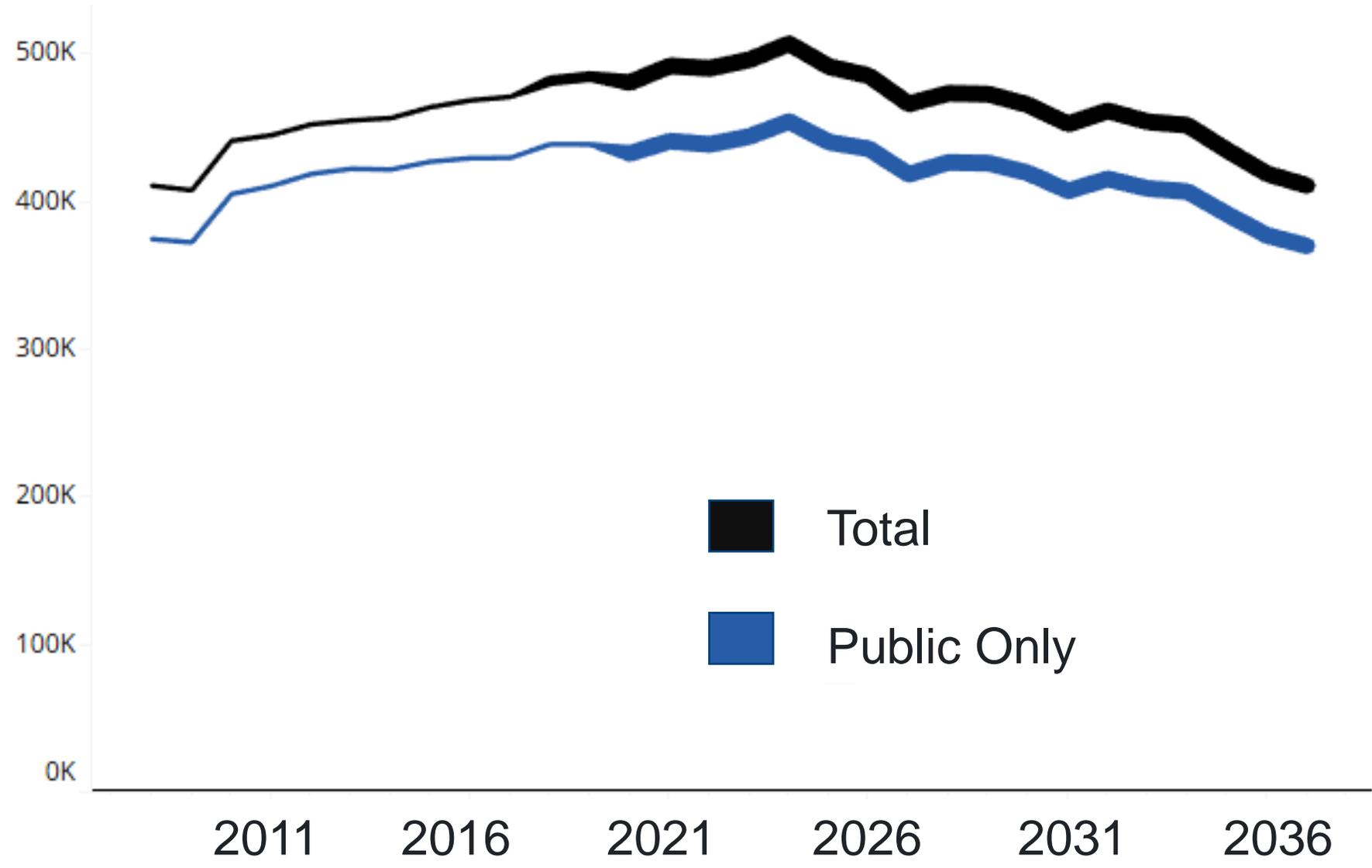
# State Variation: Florida



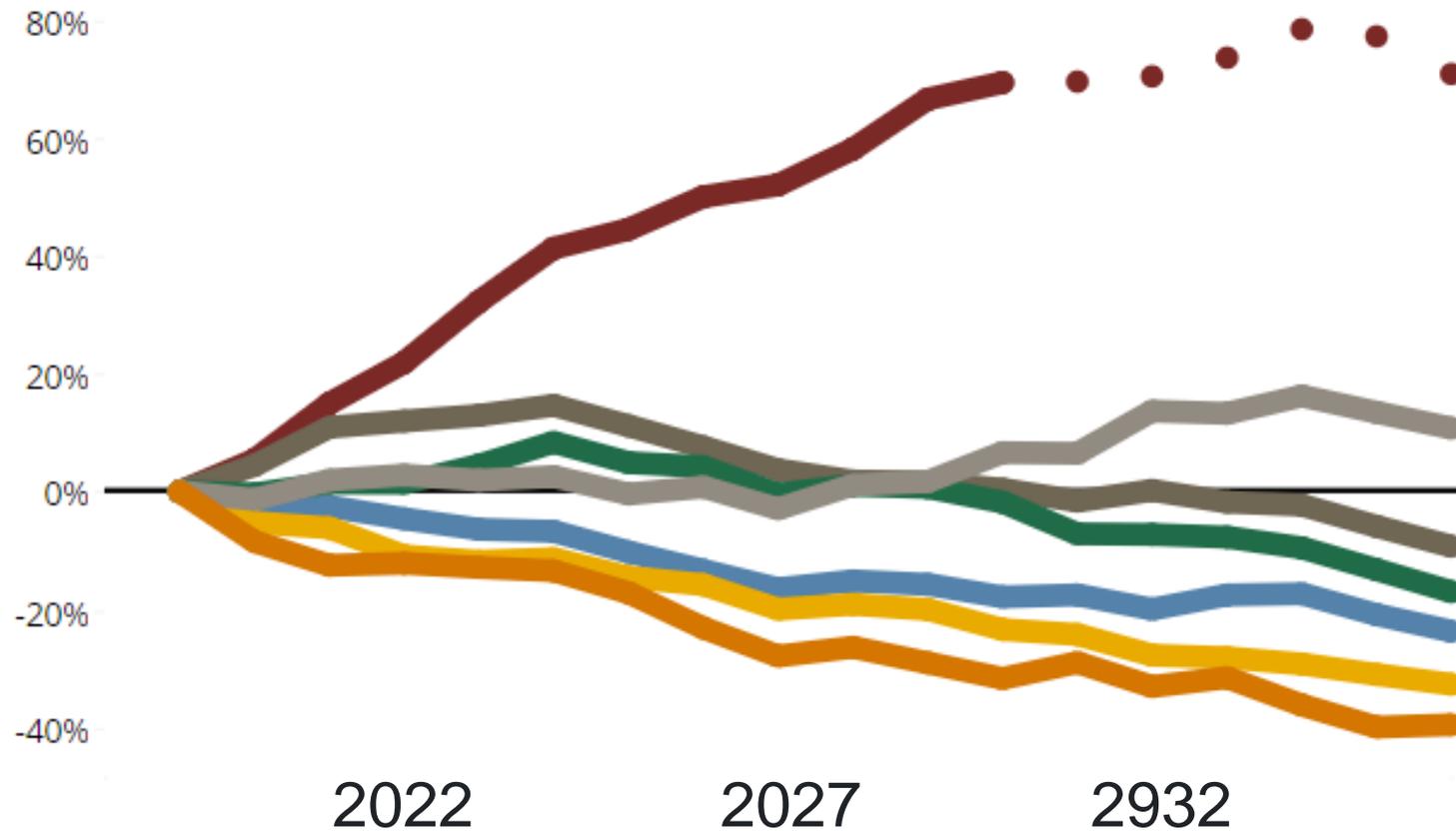
# State Variation: Florida



# State Variation: California



# Projected Change in Graduates vs. 2019: California



Two or More Races !▲71%

Asian/PI ▲11%

Black ▼-33%

Hispanic ▼-17%

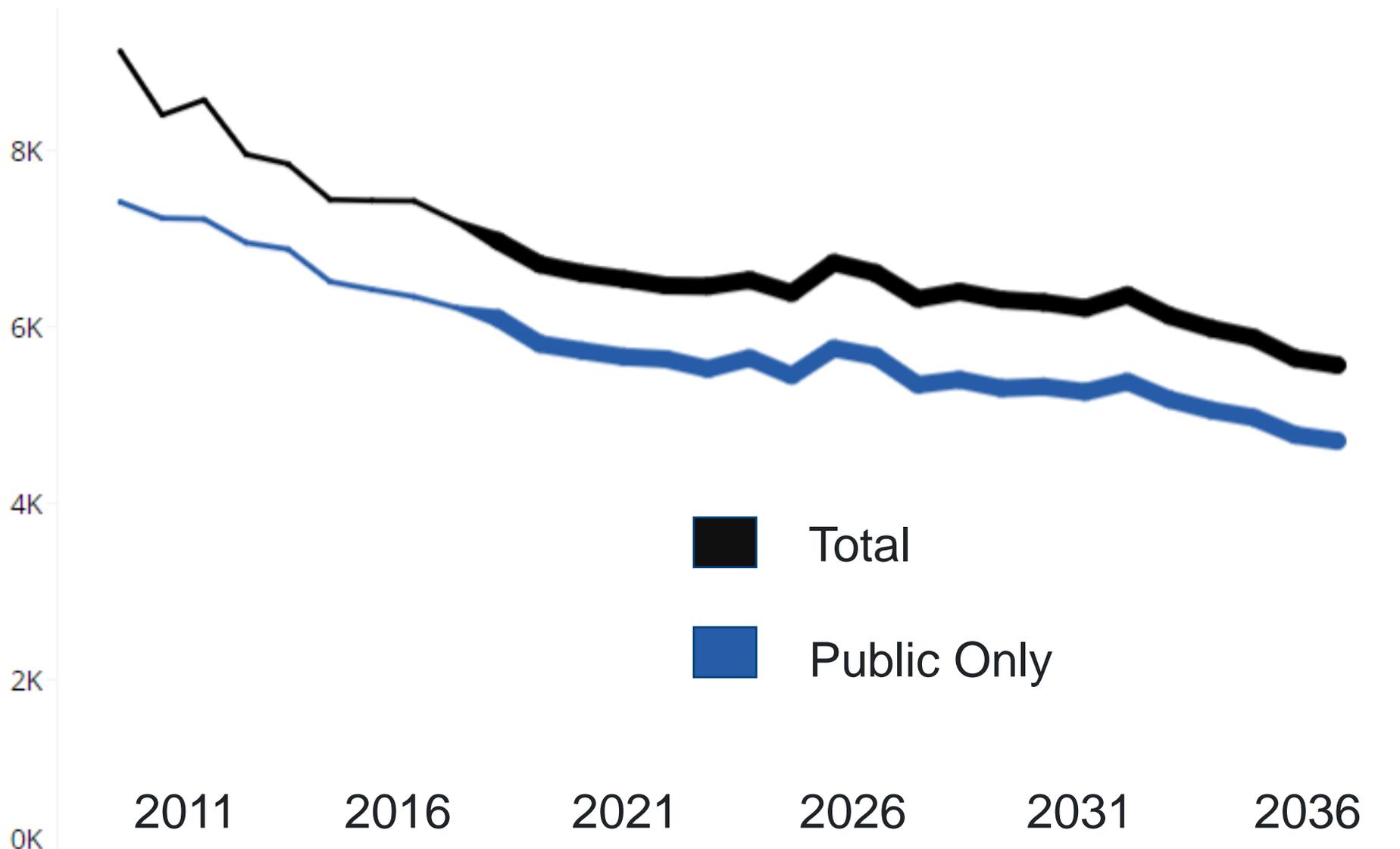
Public Schools Total ▼-14%

AI/AN ▼-39%

White ▼-24%

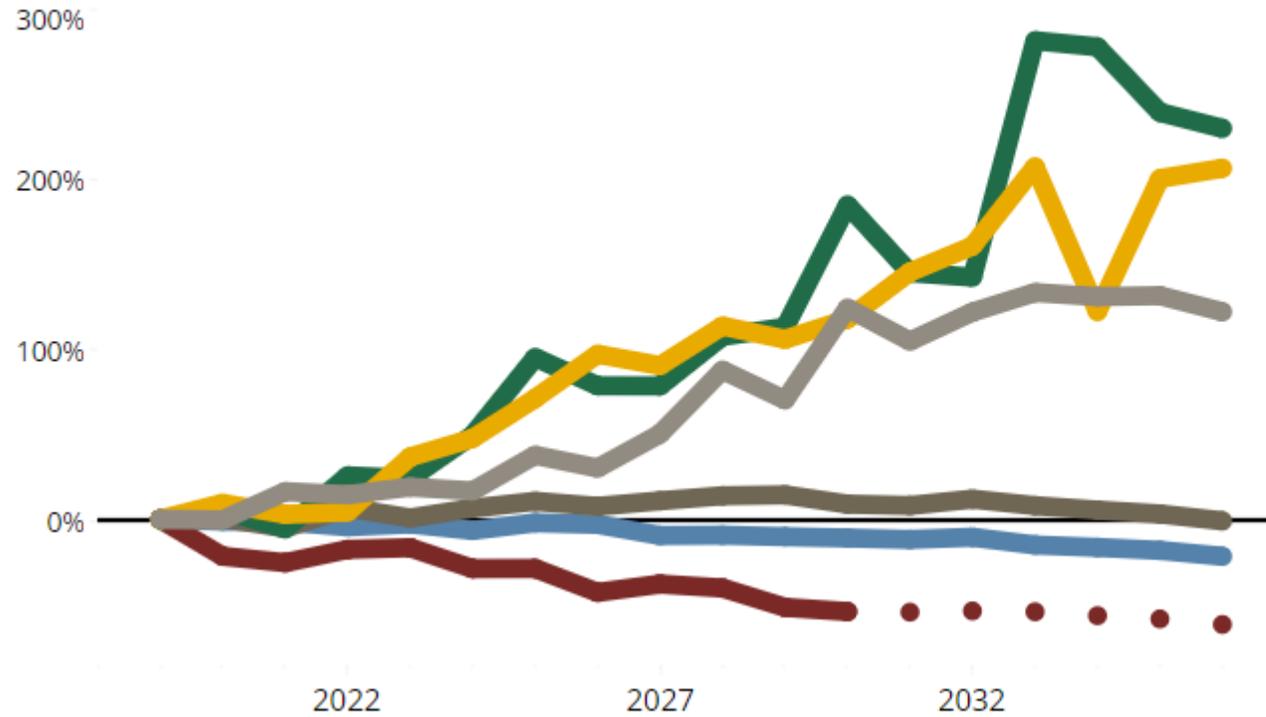
Private HS Grads ▼-9%

# State Variation: Vermont

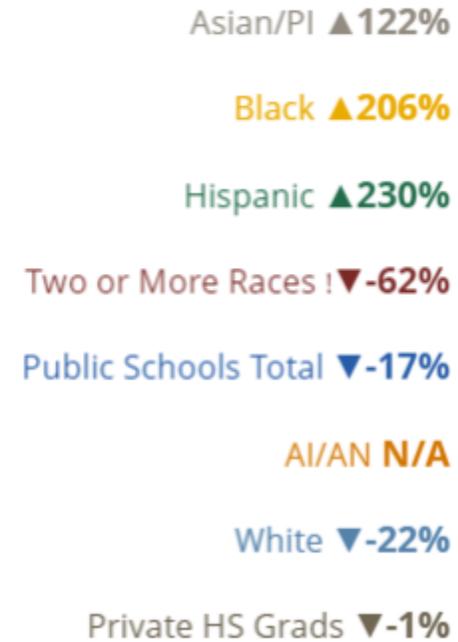


# State Variation: Vermont

Cumulative Percent Change



Change between 2019 & 2036



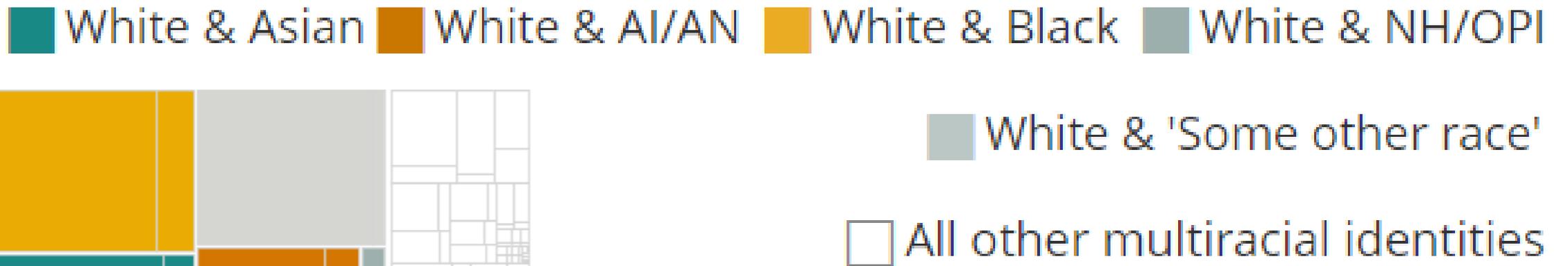
# Census 2020 Data – Student Diversification



# First Look: Census Redistricting Data

- Consistent with projections: Increasing diversification, limited number of future potential graduates
- “Two-or-more race” category is highly diverse
- Native students underrepresented by race/ethnicity categories

# Census Data: Two or More Races



## NAST Enrollments

Key question:

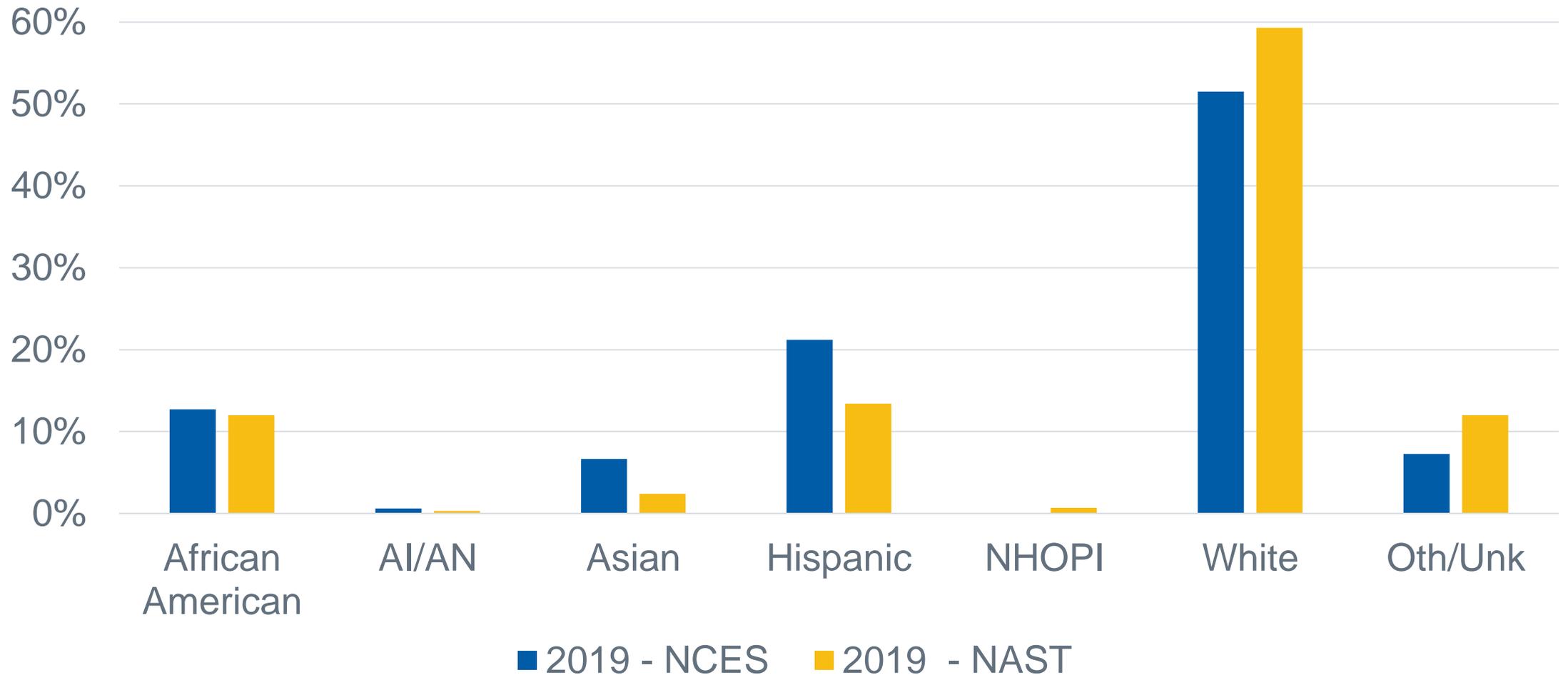
How does NAST enrollment data relate to the number of high school graduates?



# Overall

- NAST schools tend toward 4-yr institutions
- May be shielded from biggest pandemic impacts
- Demographic impacts may be muted at selective institutions (see Nathan Grawe's research for more detail)

# NAST Enrollment vs. All Postsecondary – Race/Ethnicity (Fall 2019)



# Implications

- NAST schools' enrollment is slightly whiter and less Hispanic than overall postsecondary population
- This may add to enrollment headwinds
- Serving those student groups that have traditionally been marginalized and/or poorly served must be a priority



# Pandemic Trends

# Class of 2020 – Projections vs. Actual

Projected change (vs. 2019): -41,000 students

Actual change (vs. 2019): -335 students

Driven by Florida (+15k grads vs. projections), Washington (+3k), and Kansas (+2k)

# 2020-21 High School Enrollments

- Slightly higher progression of 2019-20 11<sup>th</sup> graders (potential Class of 21 grads).
- If new progression rate holds, modest increase in number of graduates (approx. one percent)

# COVID-19 Impacts: Postsecondary Enrollment

- **Fall 2021 Enrollment:**
  - Down 3.5% vs. Fall 2020
  - Down 7.8% vs. Fall 2019
- **First-year enrollment**
  - Down 2.7% vs. Fall 2020
  - Down 13.1% vs. Fall 2019
  - But private non-profits up 2.5% vs. Fall 2020

Source: National Student  
Clearinghouse Research Center

# COVID-19 Impacts: Postsecondary Enrollment

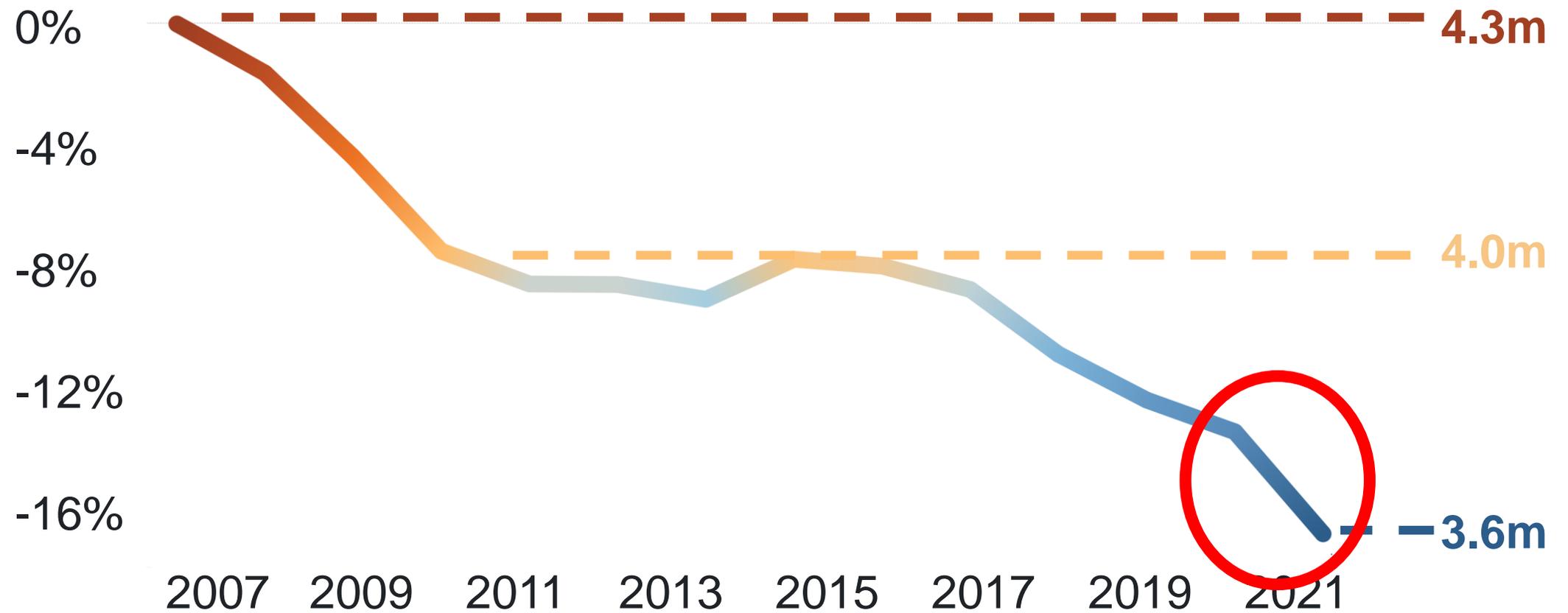
- Declines concentrated at for-profits and public 2-yr institutions
  - For-profits down 10.8% vs. Fall 2019
  - 2-yrs down 14.8% vs. Fall 2019
- Declines highest among White, Black/African-American, and Native American students

Source: National Student Clearinghouse Research Center

# COVID-19 Impacts: Key Questions

- How has college-going behavior changed since the beginning of the pandemic?
- Is it permanent?
- Are there institutional, state, or federal policies that can reverse these trends?

# Births Data, Part II



Source: Centers for Disease Control and Prevention

So What?

What does this all mean?



# The “Crystal Ball” Slides



**Warning**  
**Caveats**  
**Ahead**

# The “Crystal Ball” Slides

- Fact: There will be fewer 18 year-olds in the future than there are now
- Question: How many will graduate high school?
- Another question: How many of those will go on to college?
- Yet another question: How many other students will come back to college?
- And one more: Immigration policy?
- College enrollment trends are more worrisome than demographic trends

# What Will Successful Institutions Do?

**DON'T  
PANIC**

# What Will Successful Institutions Do?

Pct. of 18-24 year-olds enrolled in  
postsecondary education:

41%

Source: National Center for  
Education Statistics

# What Will Successful Institutions Do?

Full-time retention rate (4-yr insts) in  
postsecondary education:

**75.7%**

Source: National Center for  
Education Statistics

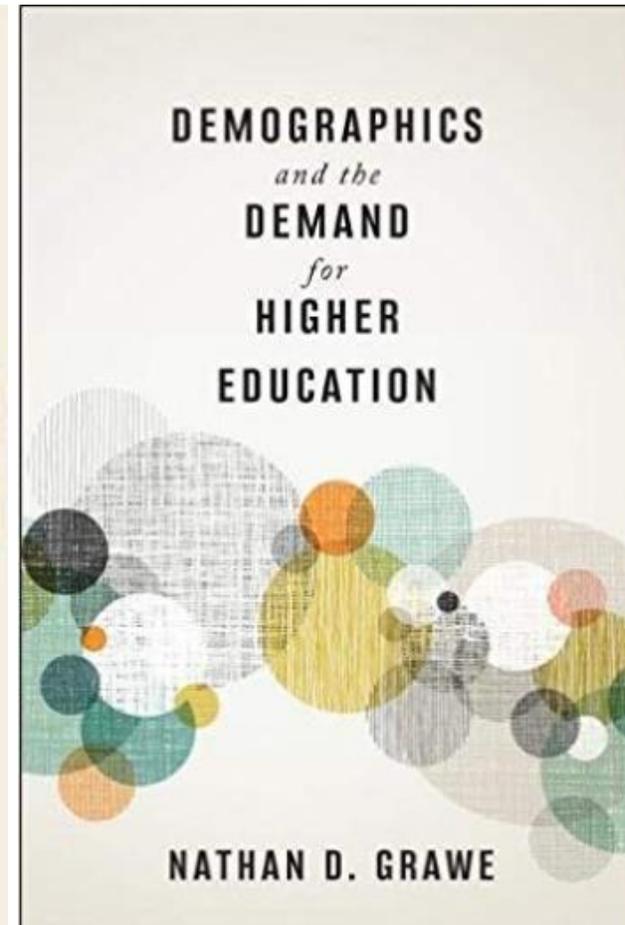
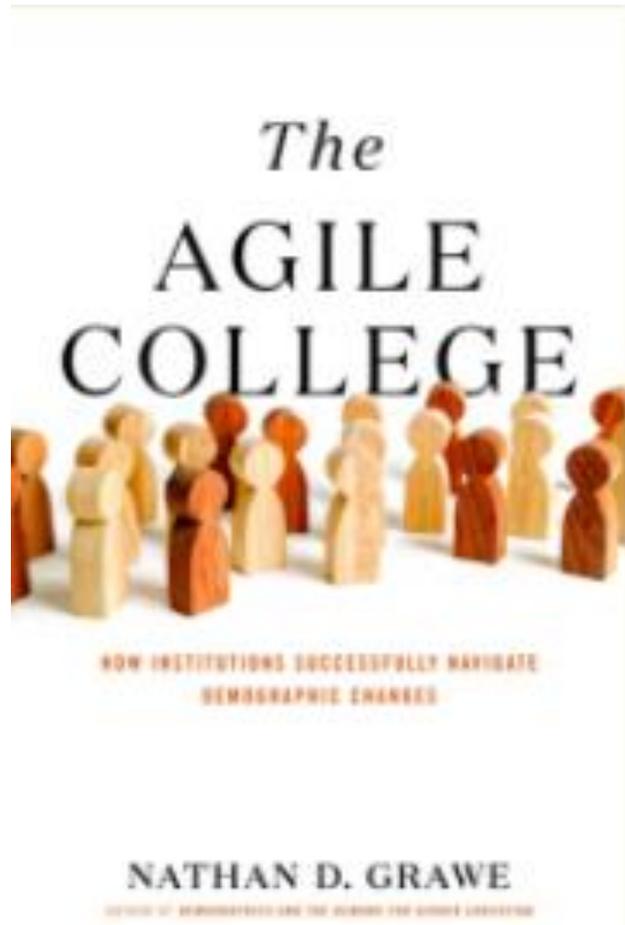
# What Will Successful Institutions Do?

Number of U.S. residents 25 and over  
with some college but no degree:

**34.7 million**

Source: U.S. Census Bureau

# Required Reading



# Key Links

1. Main landing page: The main page for accessing the report and the associated resources.

<https://knocking.wiche.edu>

2. Report: Our full analysis and discussion of the results.

<https://knocking.wiche.edu/report/>

3. Executive Summary: Key findings and takeaways with high level summary.

<https://knocking.wiche.edu/executive-summary/>

4. Technical Appendix: Methodology and “weedy” release notes. <https://knocking.wiche.edu/technical-appendix/>

5. COVID-19 Analysis. <https://knocking.wiche.edu/public-hsgs-covid-19/>

6. Census Analysis. <https://knocking.wiche.edu/census2020-west-youth/>

# Questions and Follow-up

Patrick Lane  
plane@wiche.edu  
www.wiche.edu  
@wicheEDU 





# Discussion Questions

- How aware is the leadership of your institution about coming demographic trends?
- What are they doing about it?
- What are your best plans for keeping your programs strong?