

WICHE



Western Interstate Commission
for Higher Education

Western
Academic
Leadership
Forum



Changing Demographics, COVID-19 and Enrollment: Knocking at the College Door

The background of the slide is a photograph of a large group of graduates in black academic regalia with blue tassels, seen from behind, walking in a procession on a campus with green trees in the background.

KNOCKING
AT THE COLLEGE DOOR

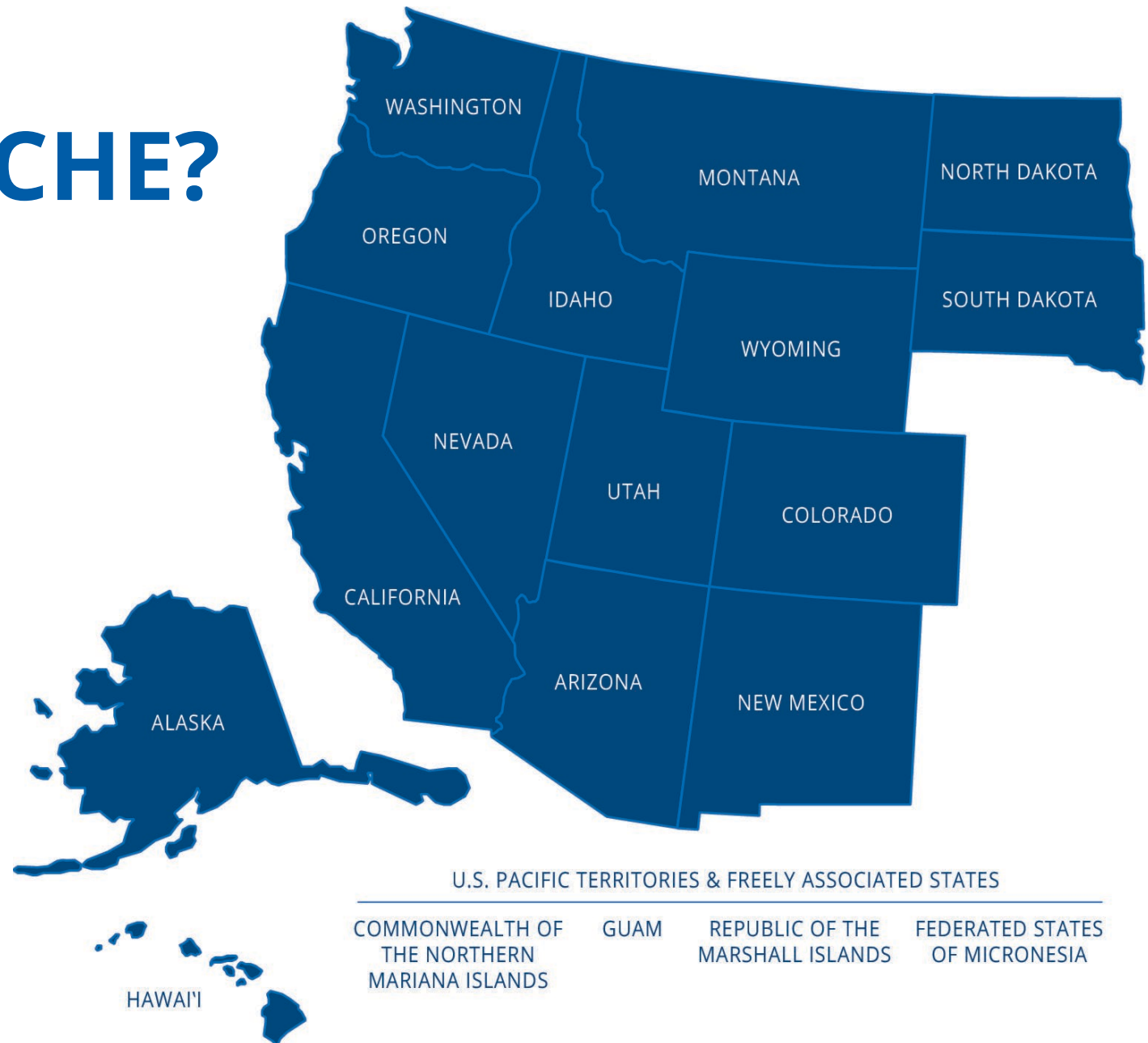
Changing Demographics, COVID-19, and Enrollment: Knocking at the College Door

Patrick Lane
WICHE
April 22, 2022

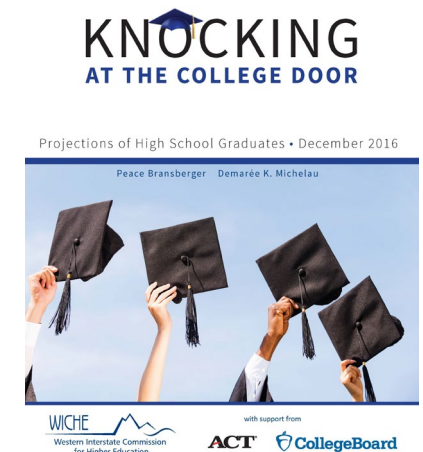
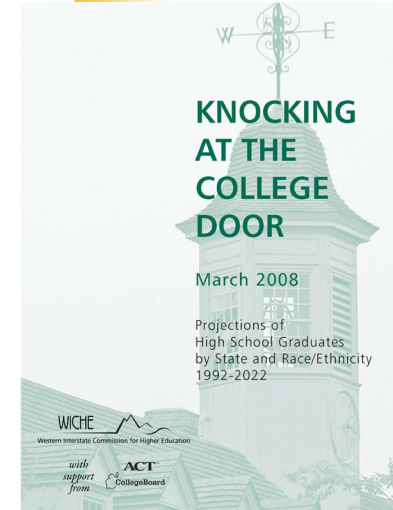
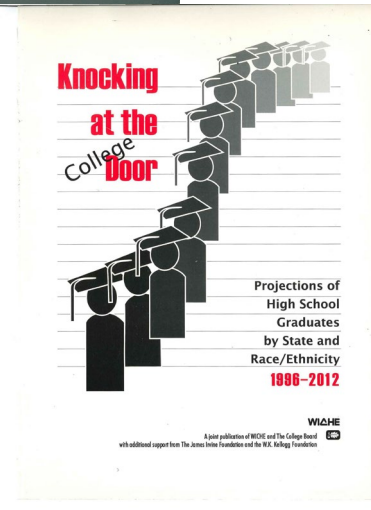
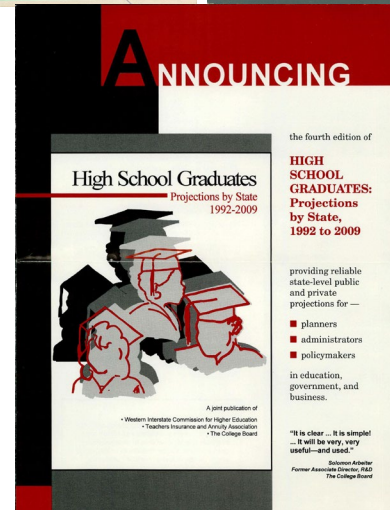
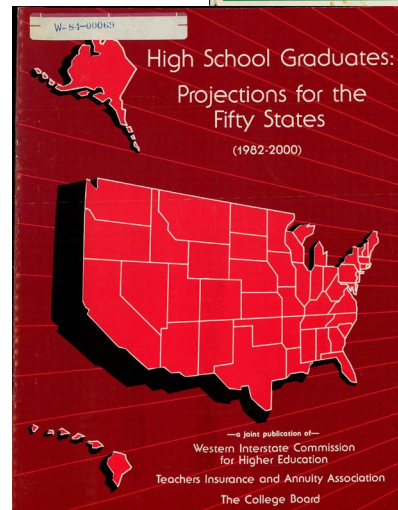
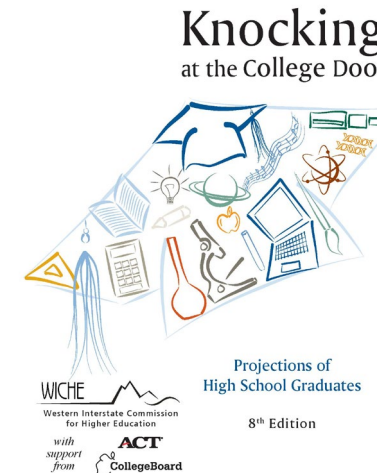
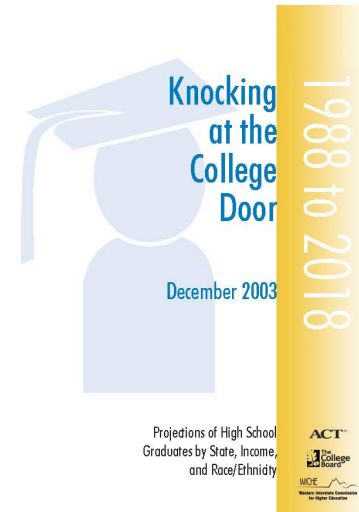
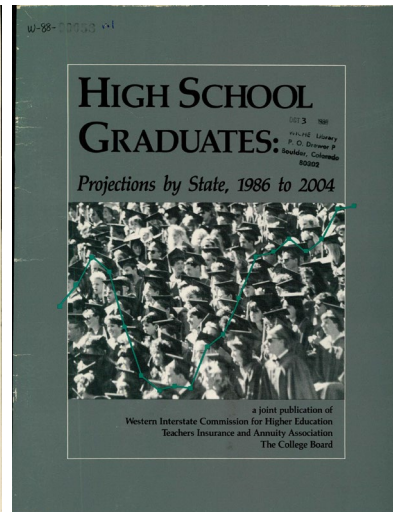
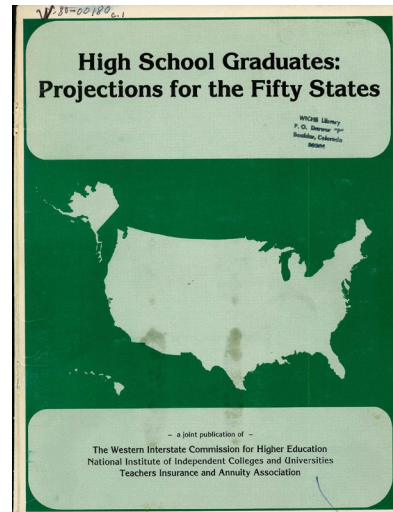
What is WICHE?

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

Pandemic trends

The crystal ball



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

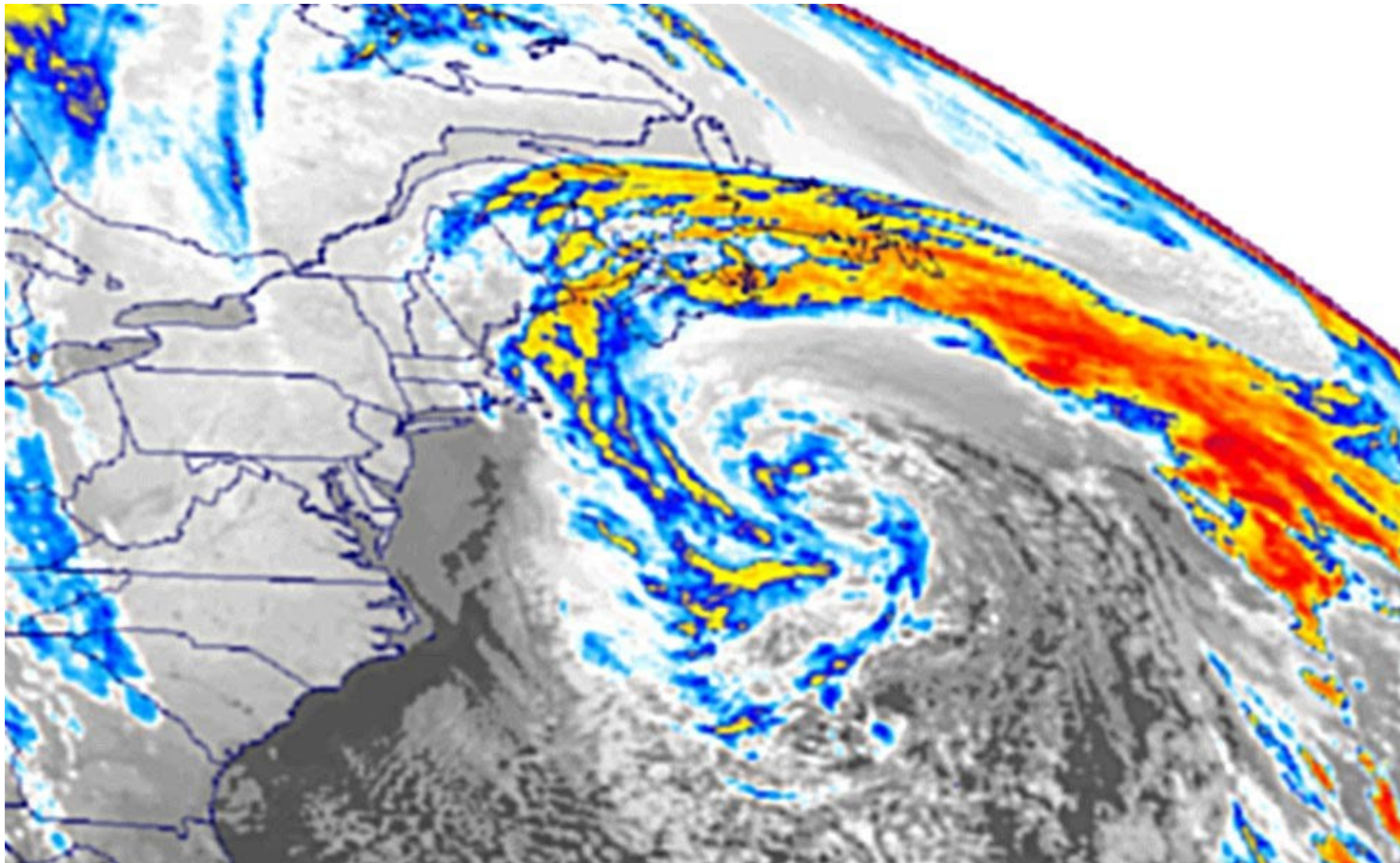
**Colleges Set to Fight for
Fewer Students**

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**

The Perfect Storm?



Source: NOAA Image
via National Park
Service

High School Graduate Projections



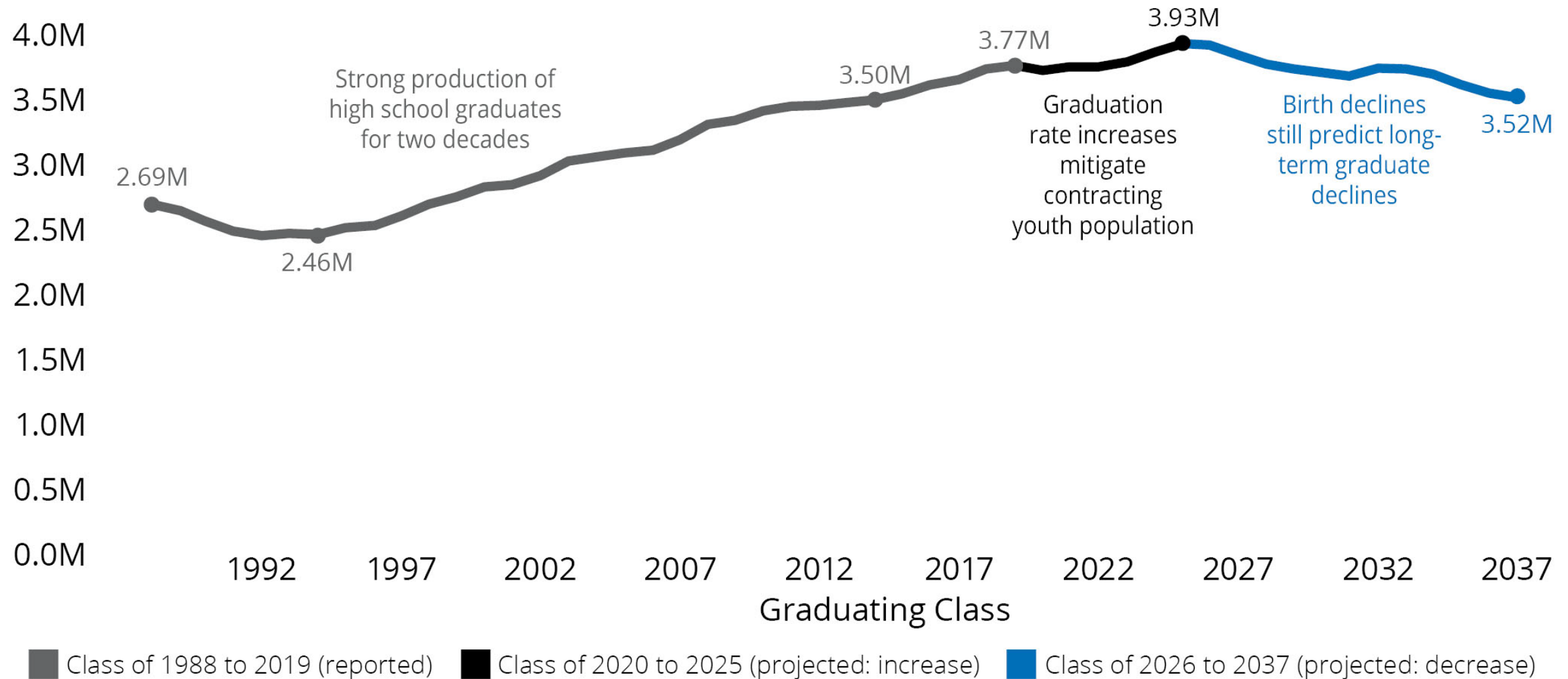
Four Key Themes

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

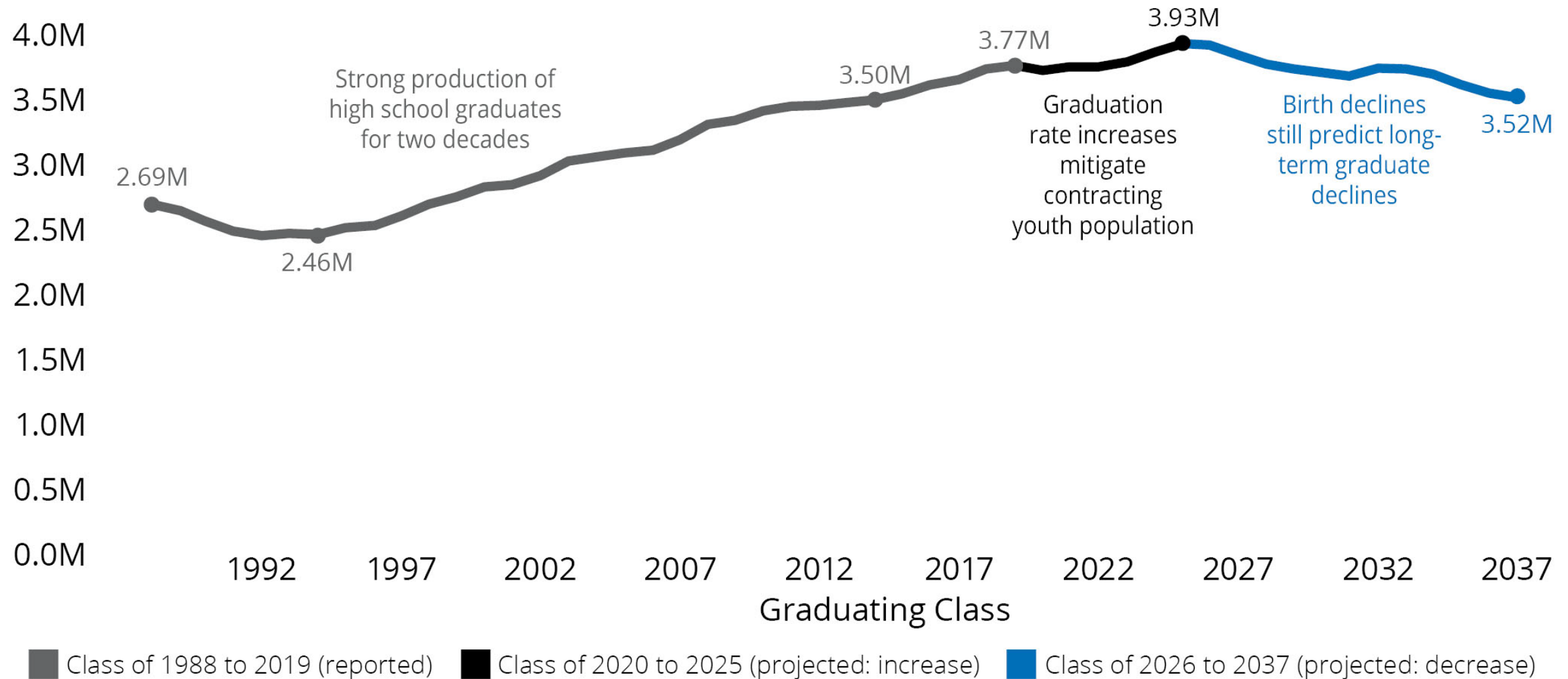




Methodological Interlude



Modest Growth, then Decline

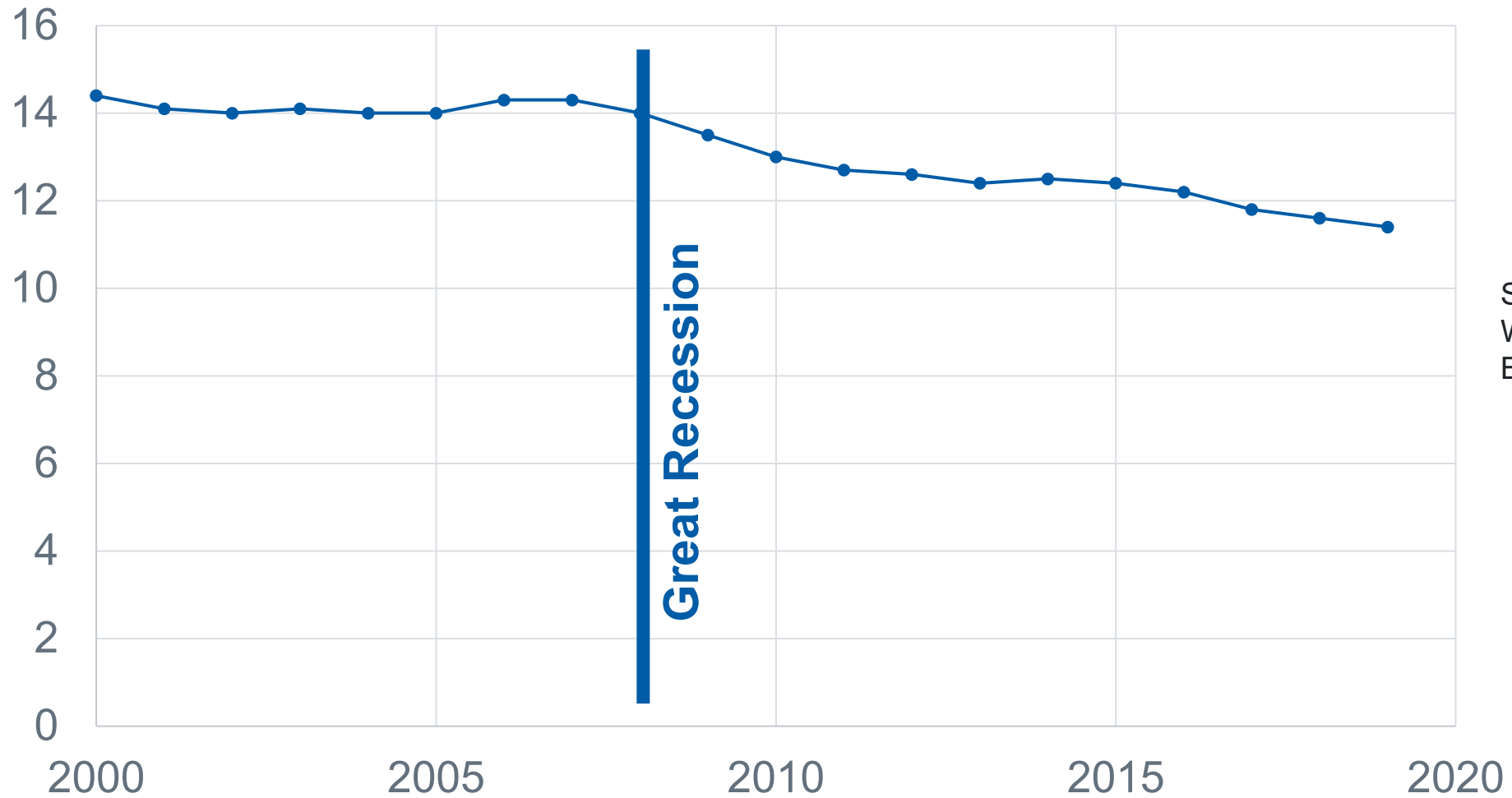


What's driving this trend?



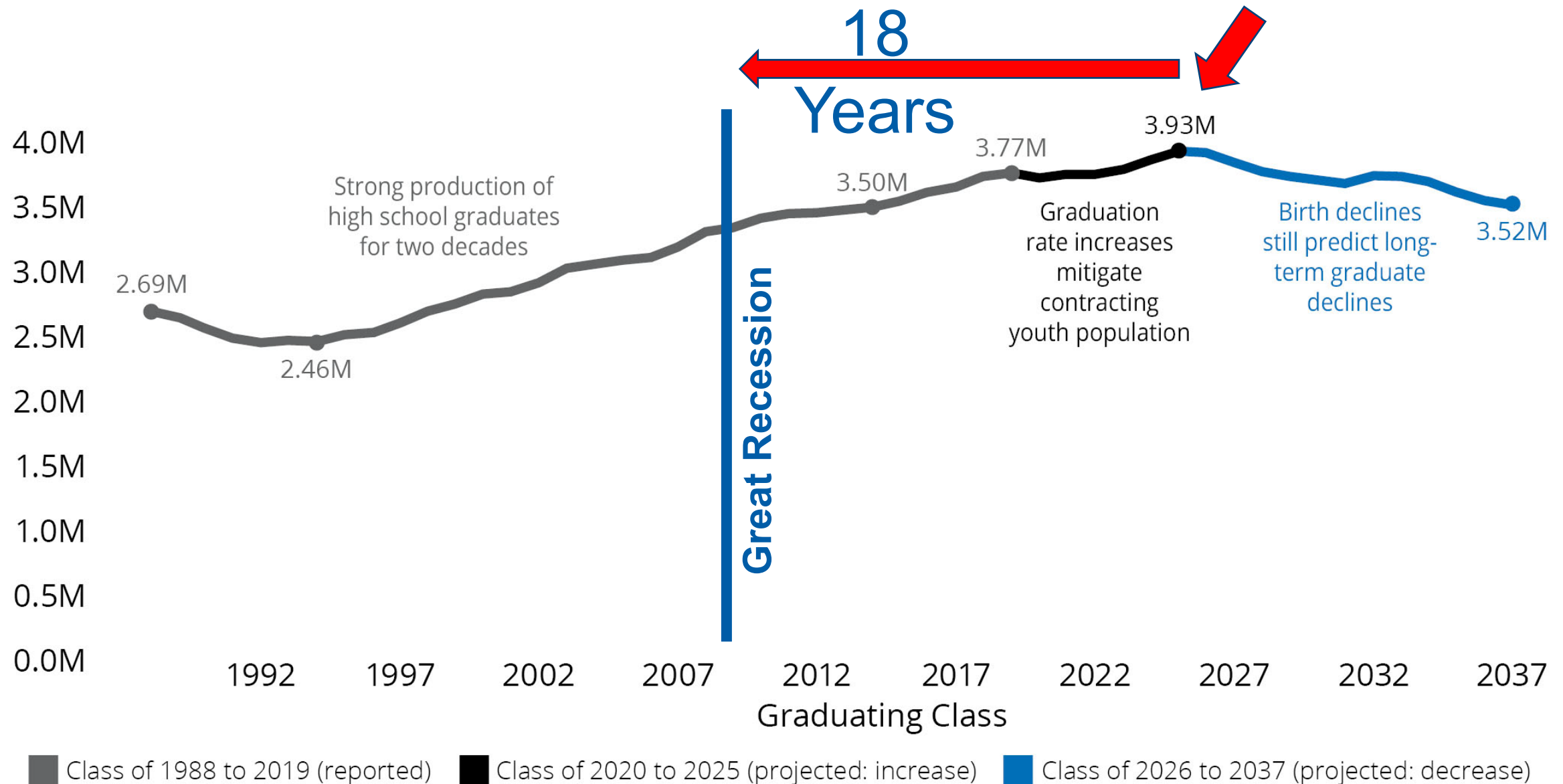
Source: Gerber website

U.S. Births per Thousand People

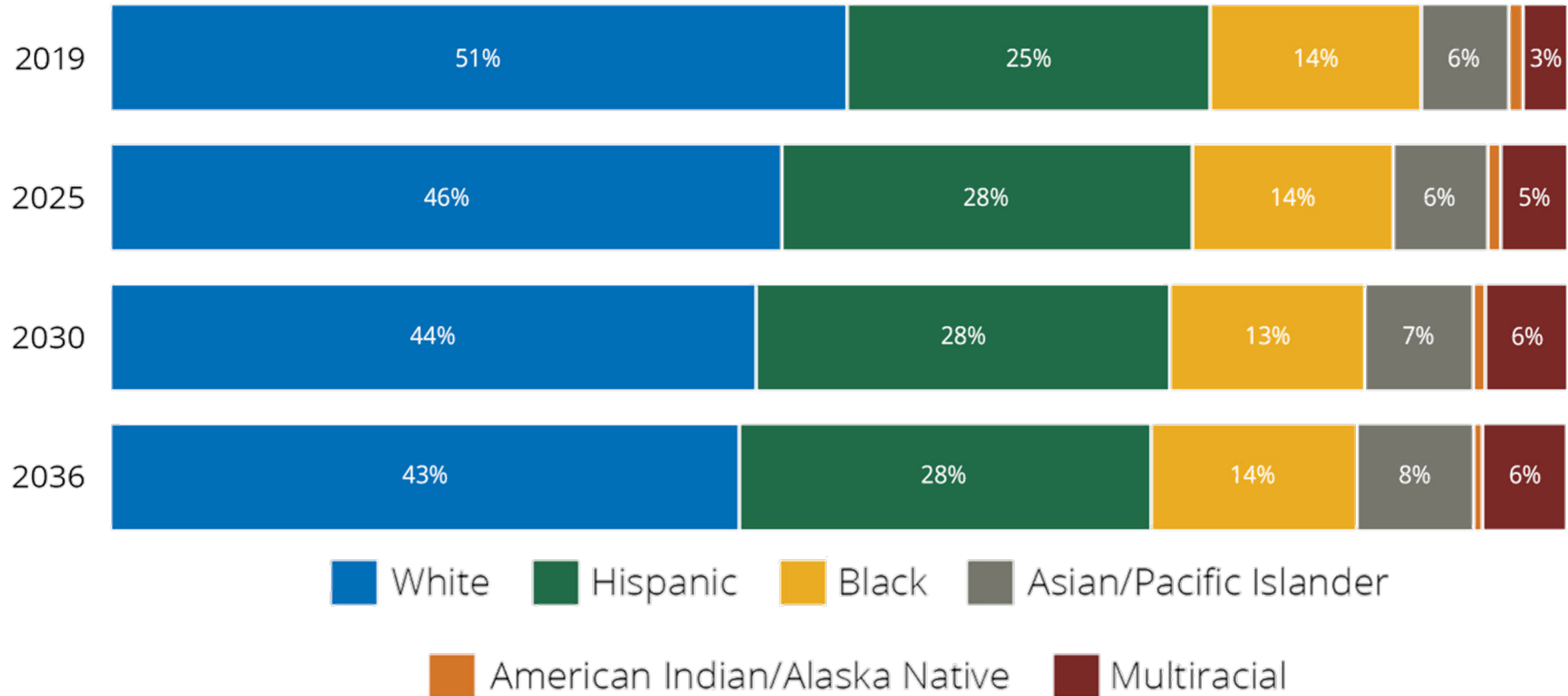


Source:
World Bank, via Federal Reserve
Bank of St. Louis

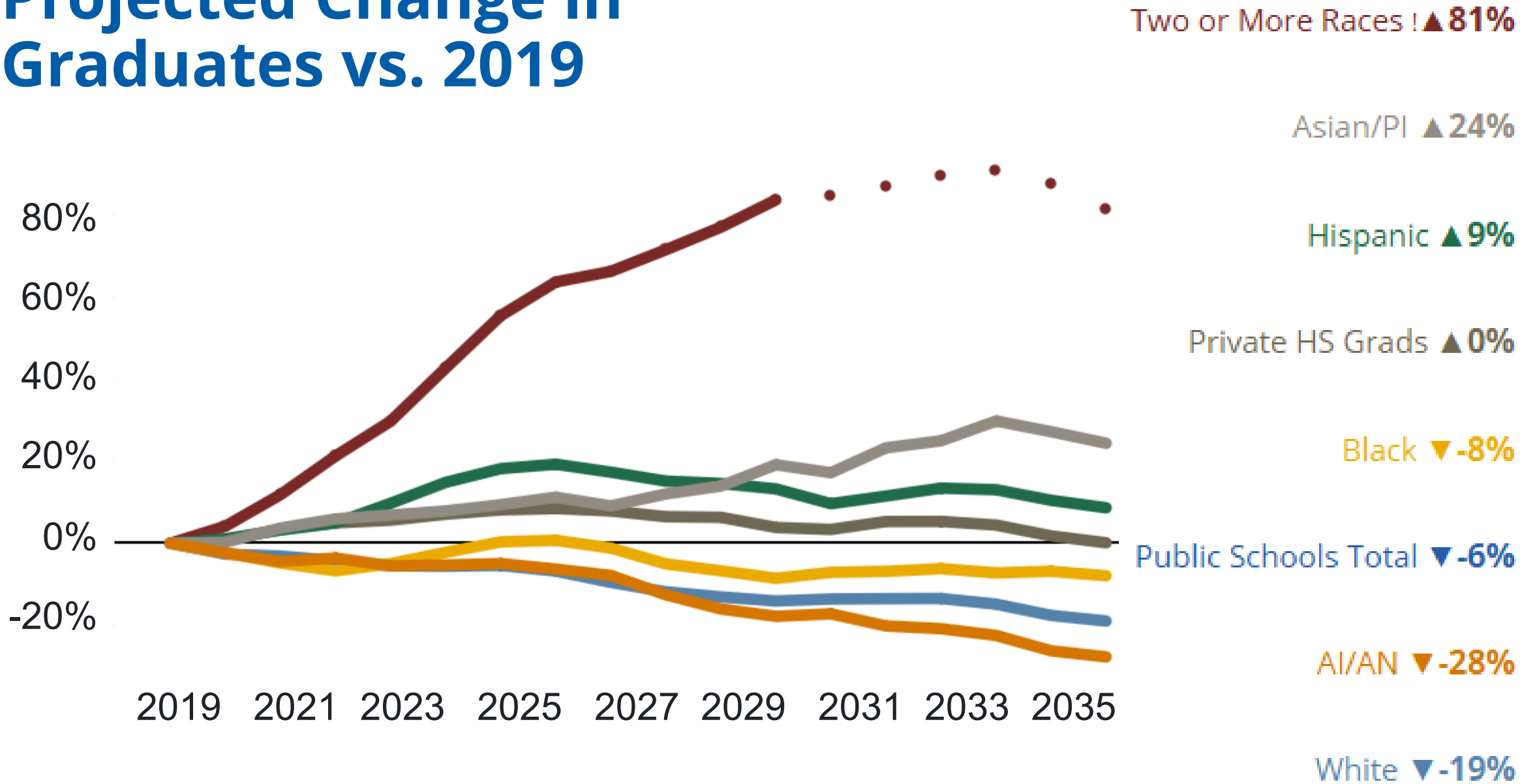
Modest Growth, then Decline



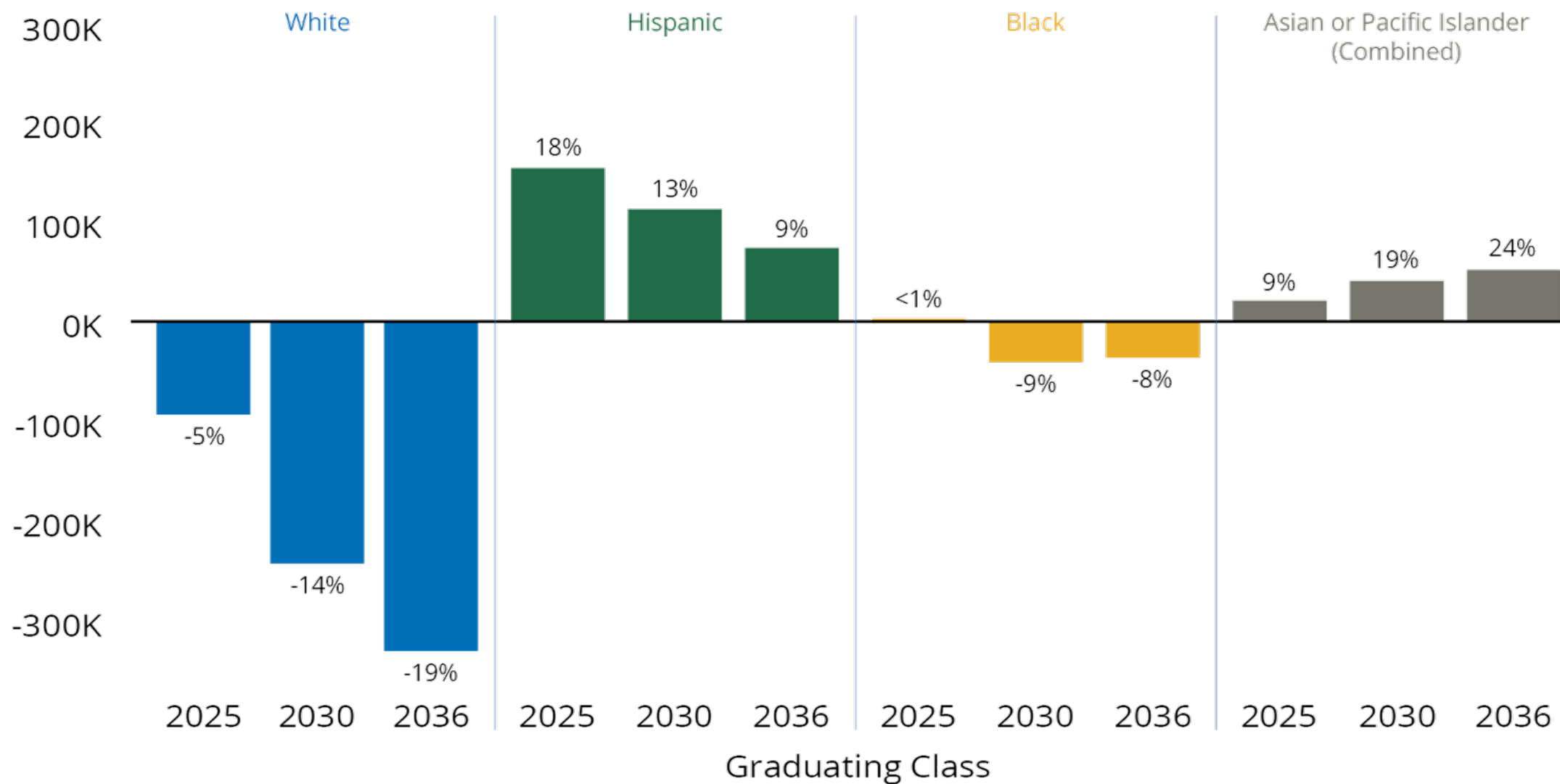
Projected Diversification of Graduating Classes



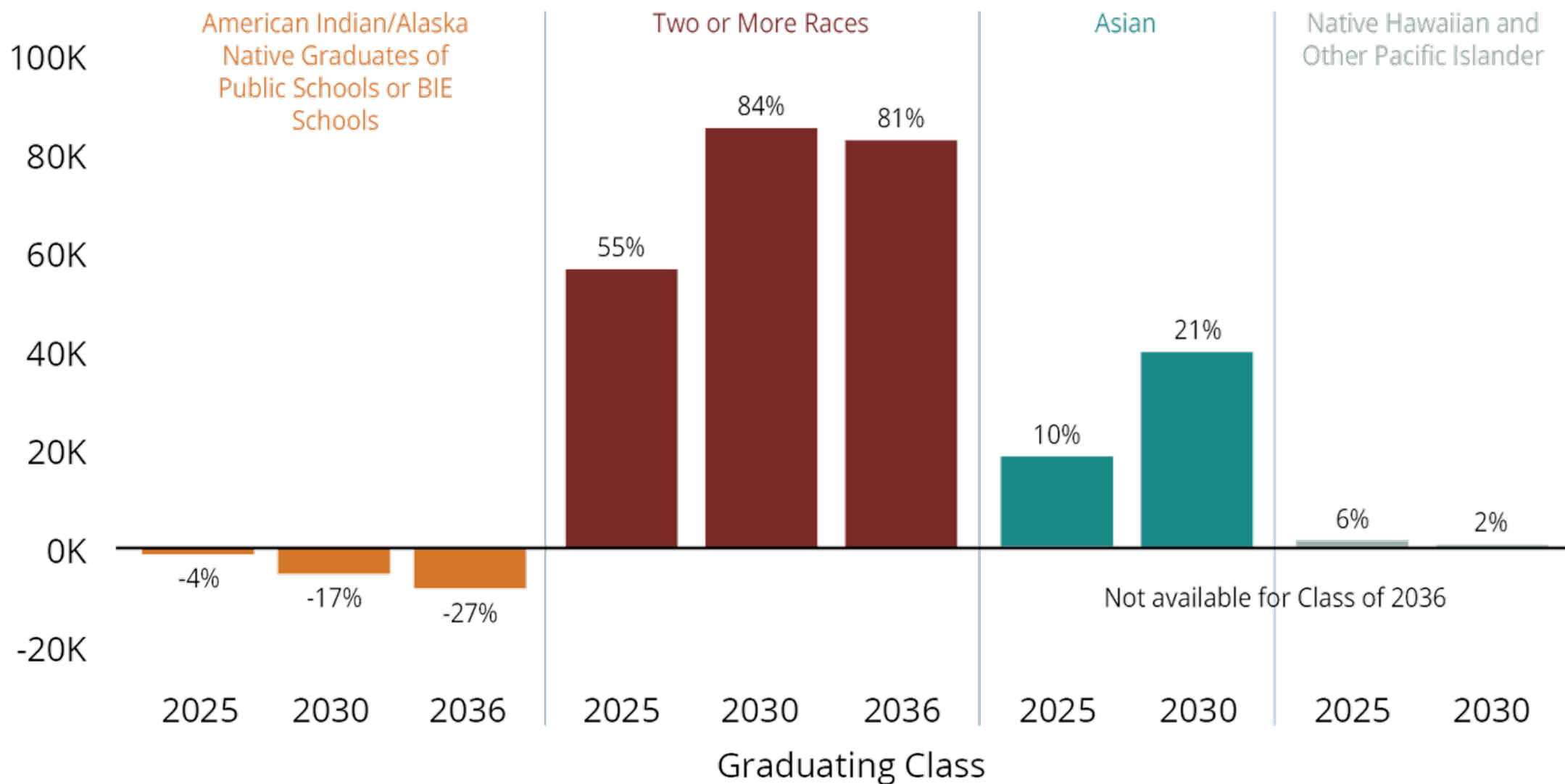
Projected Change in Graduates vs. 2019



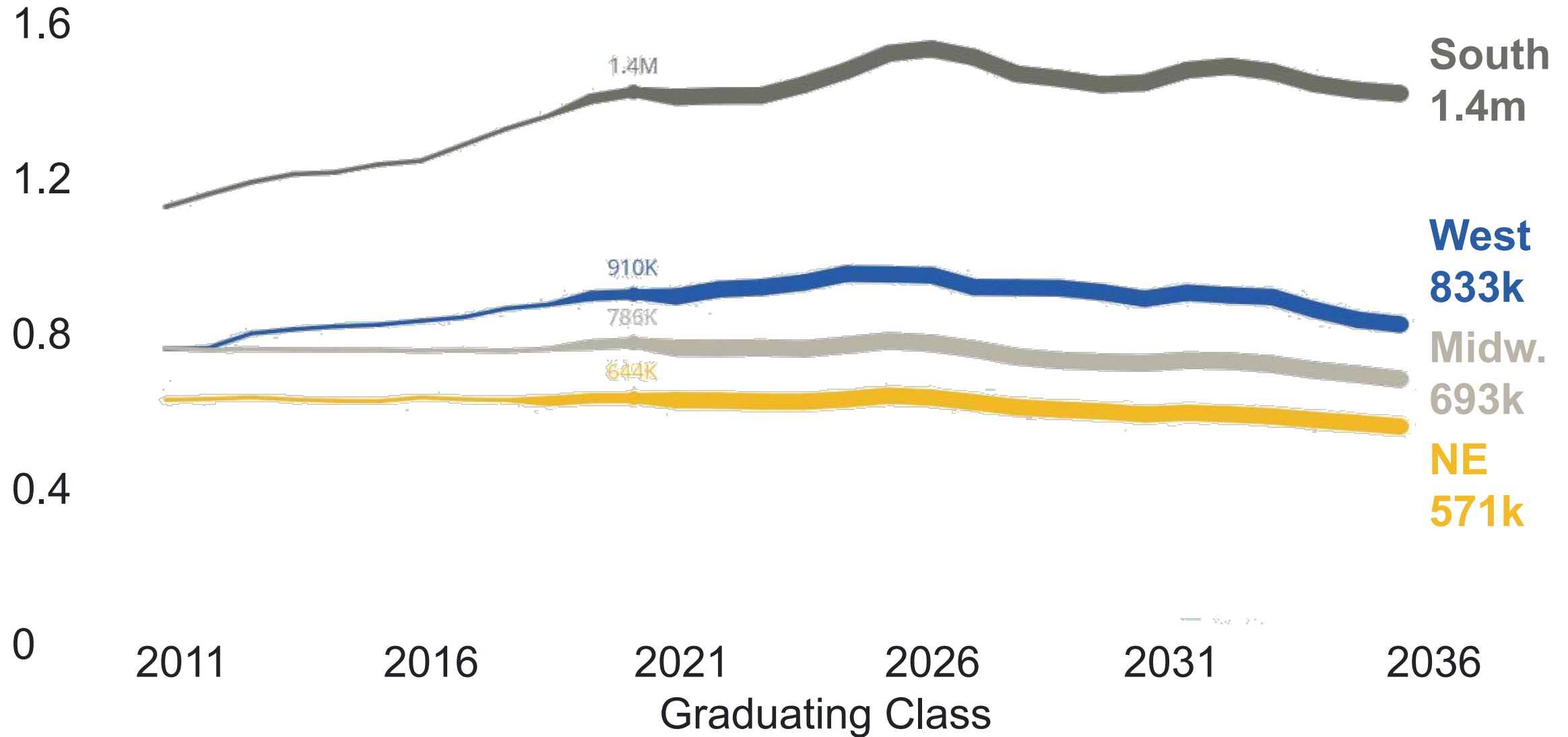
Projected Change from 2019 by Race/Ethnicity



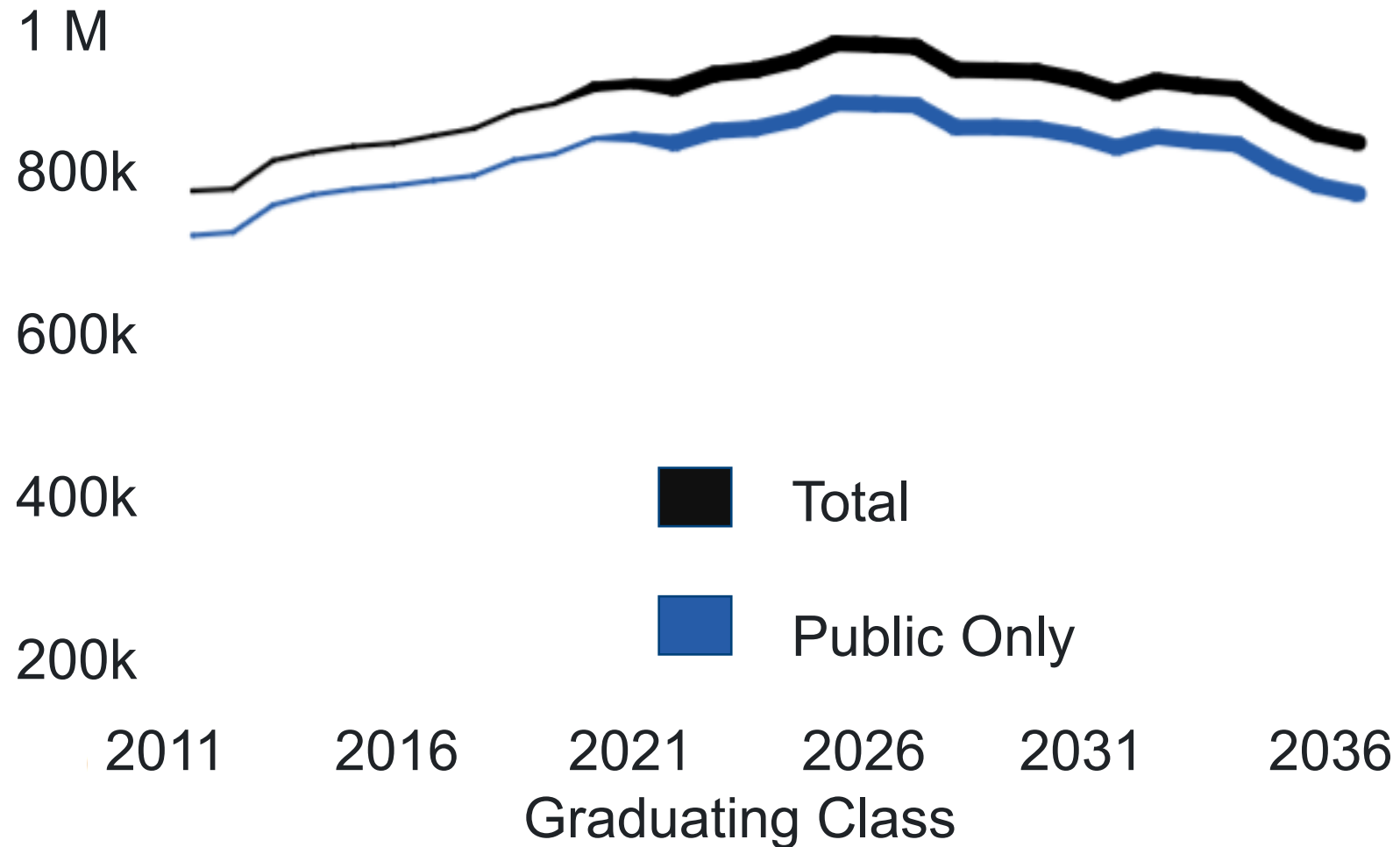
Projected Change from 2019 by Race/Ethnicity



Regional Variation

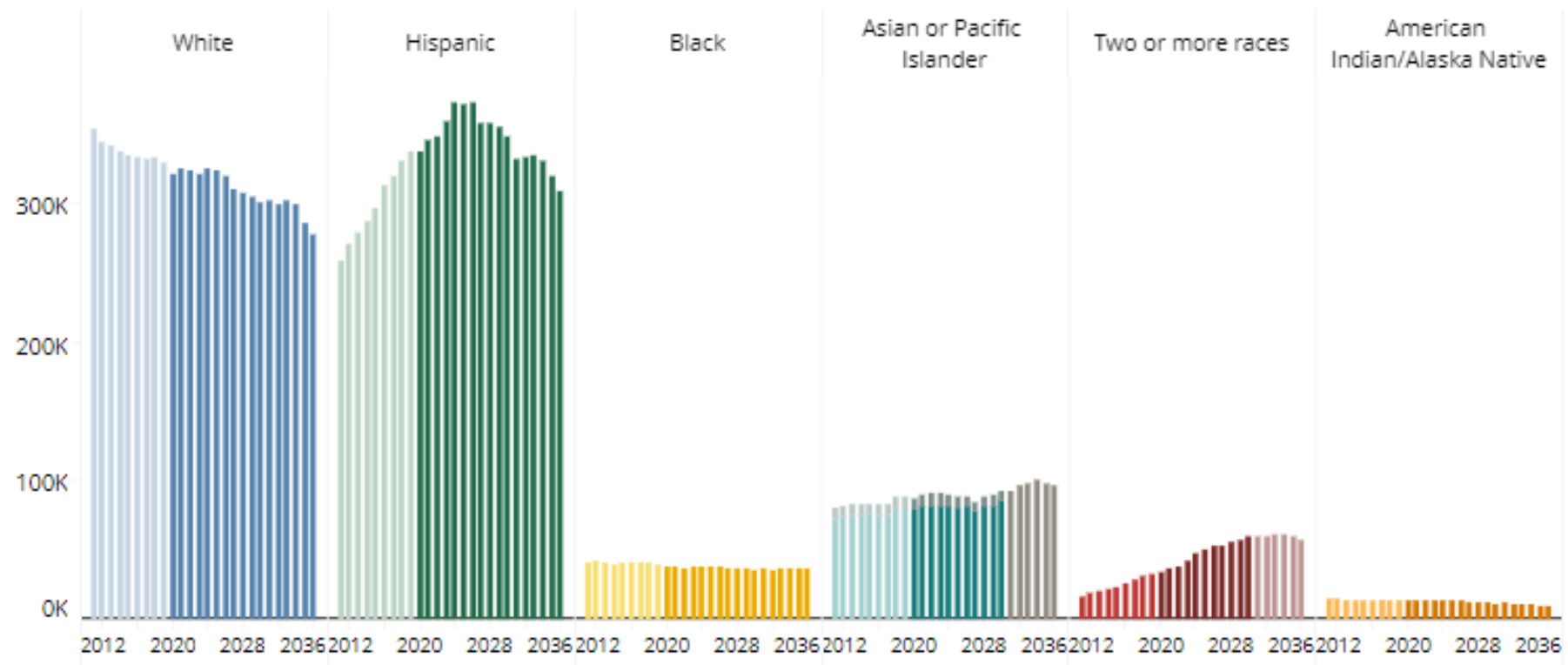


High School Graduates: The West

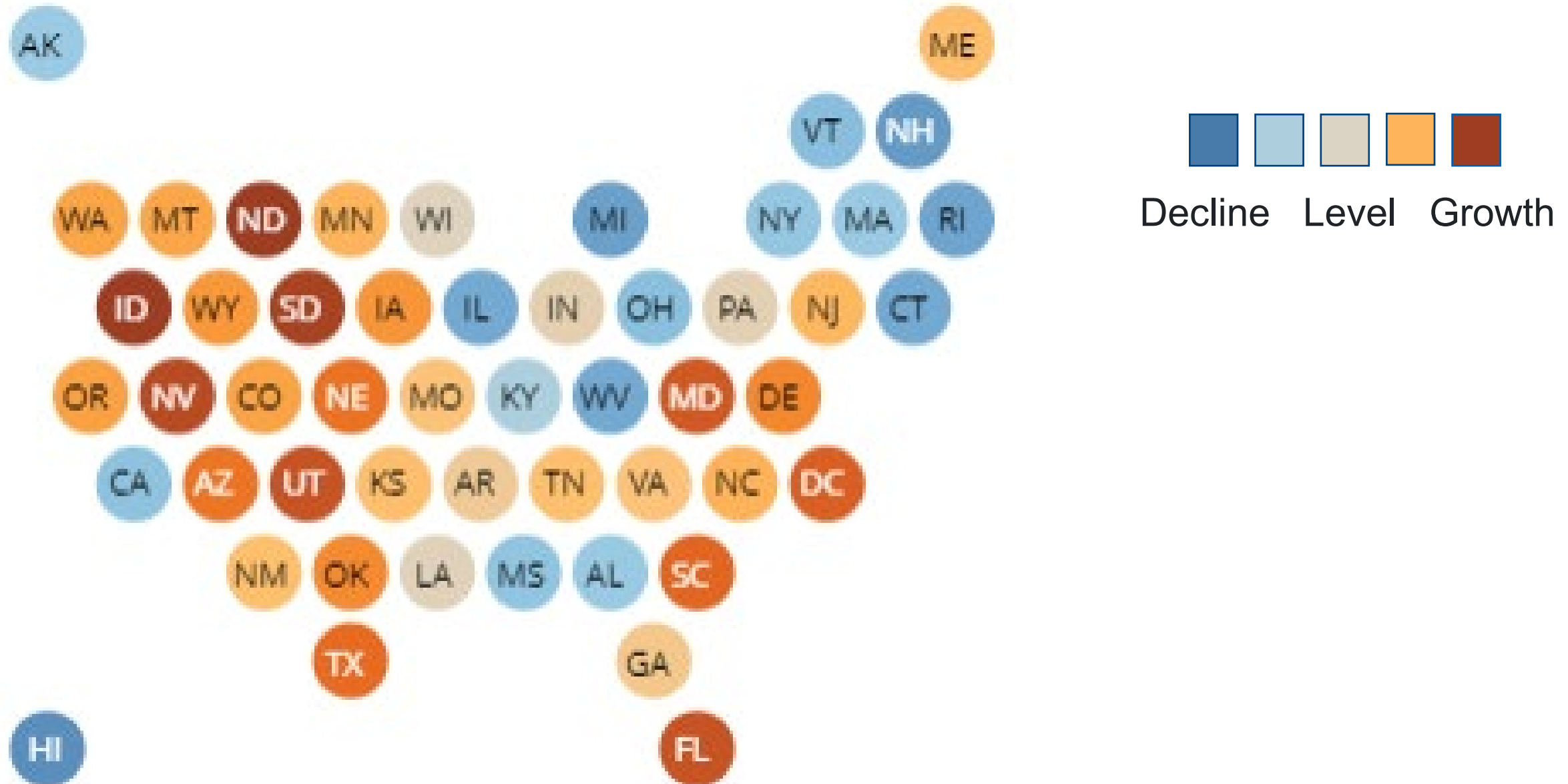


Diversification in the West

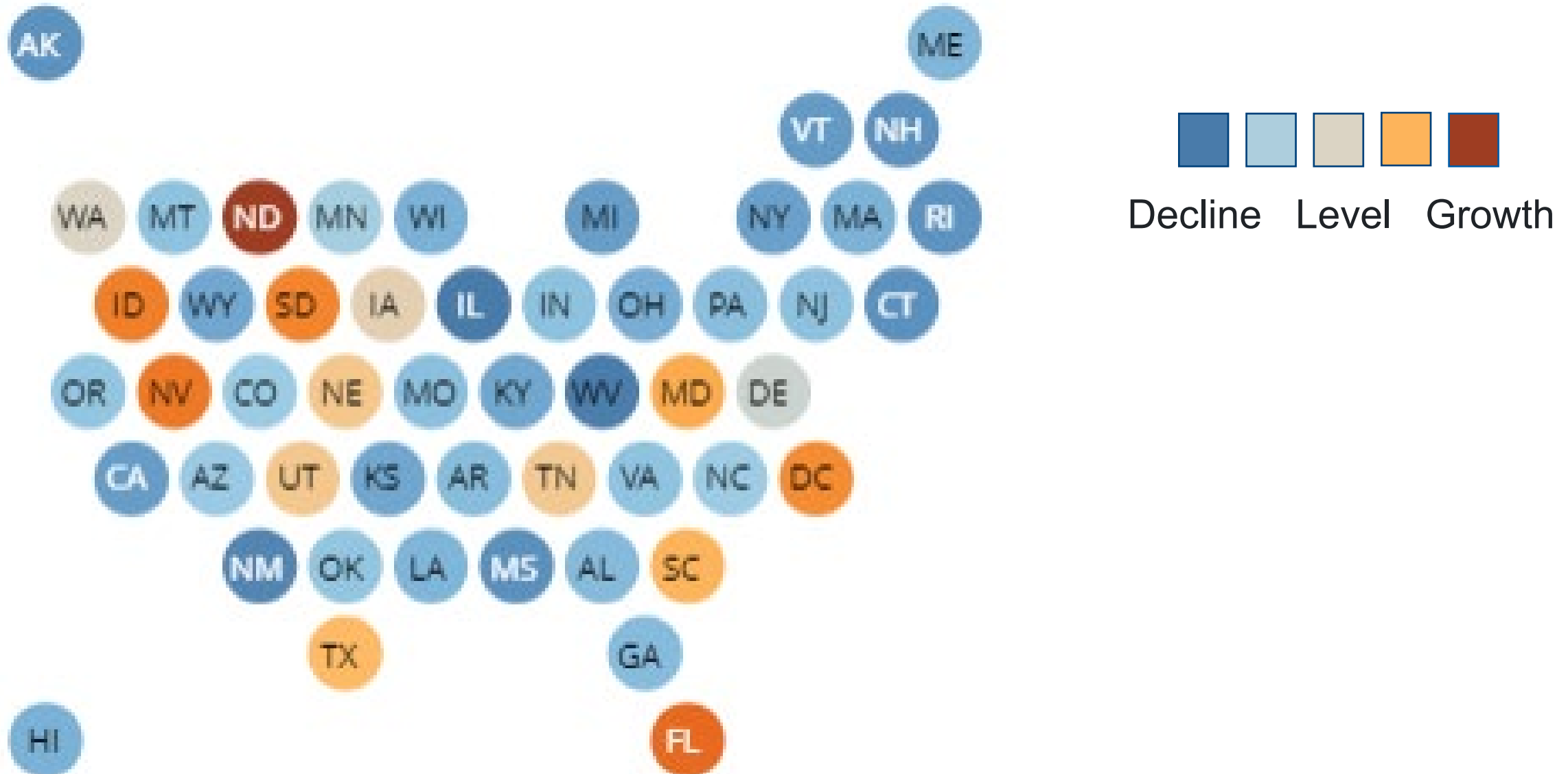
Public High School Graduates by Race/Ethnicity



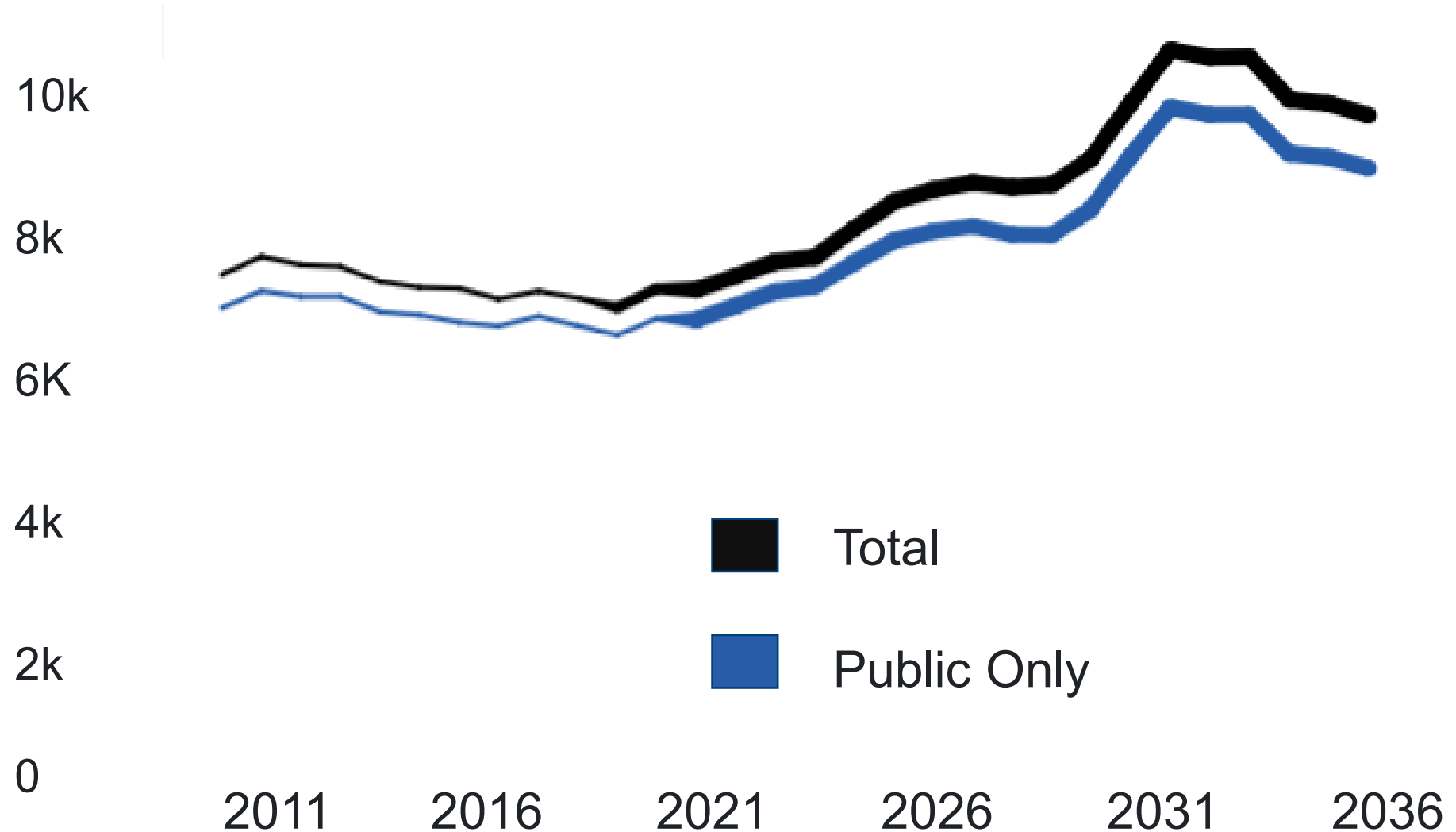
State Variation – Pct change 2019-2027



State Variation – Pct change 2019-2037



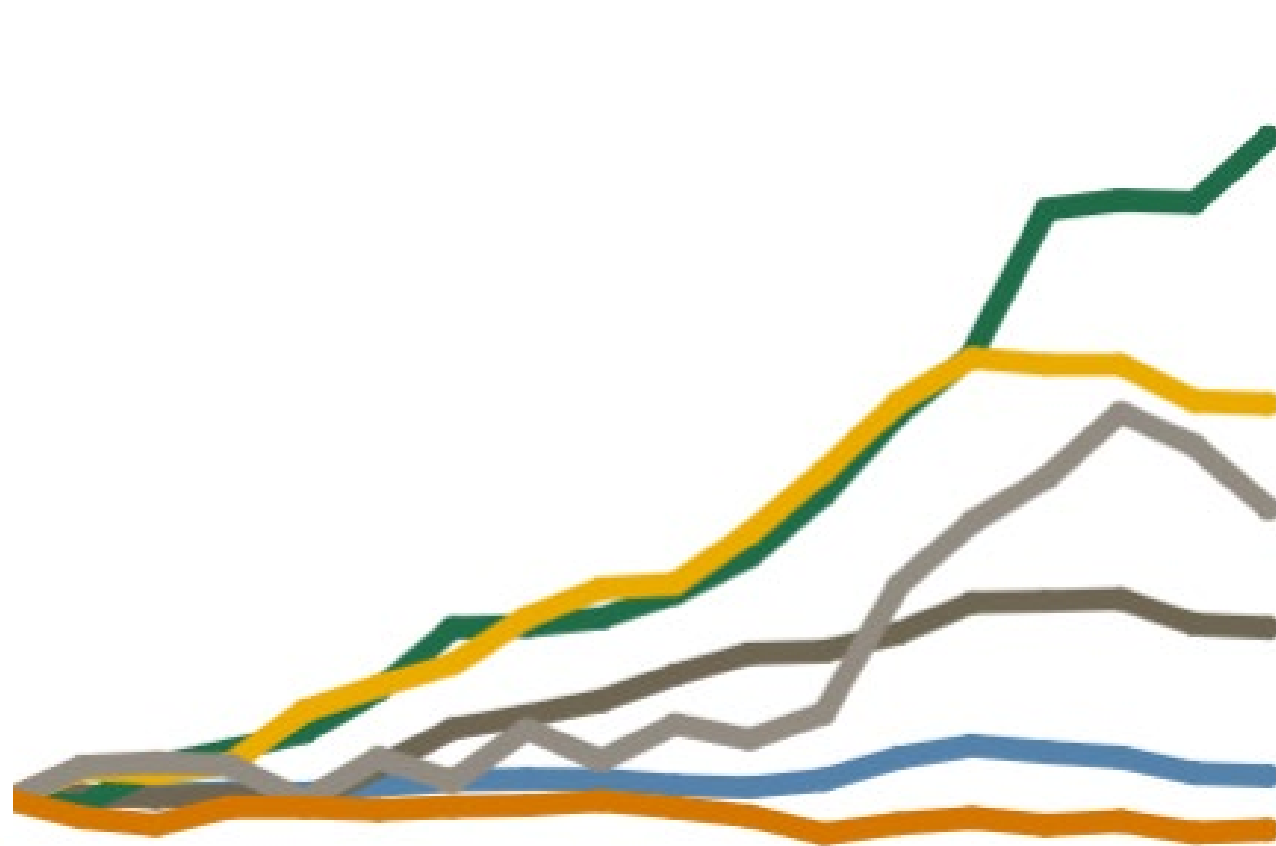
State Variation: North Dakota



State Variation: North Dakota

300%
200%
100%
0%

2022 2027 2032



Public Schools Total ▲ 33%

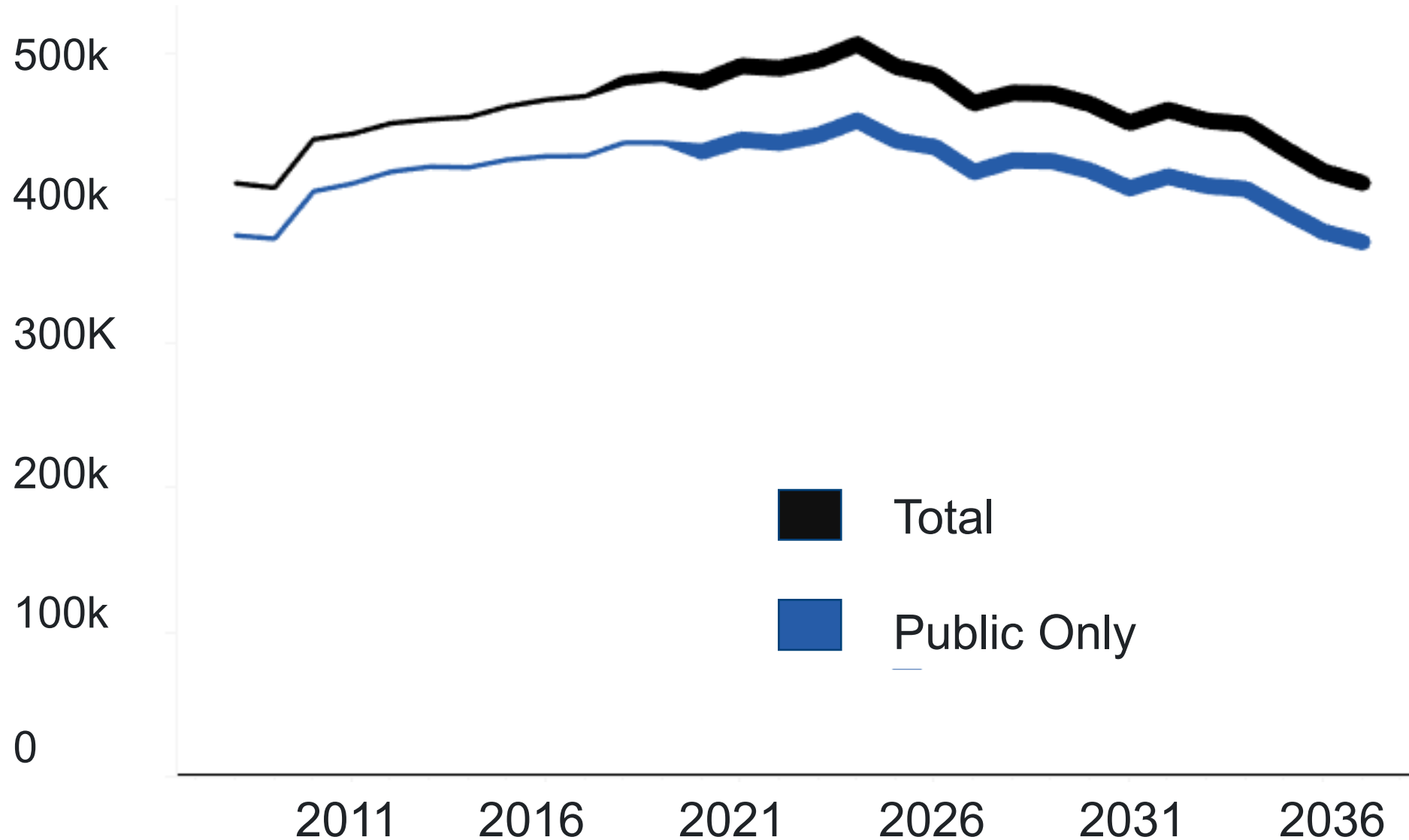
White ▲ 11%

Private HS Grads ▲ 82%

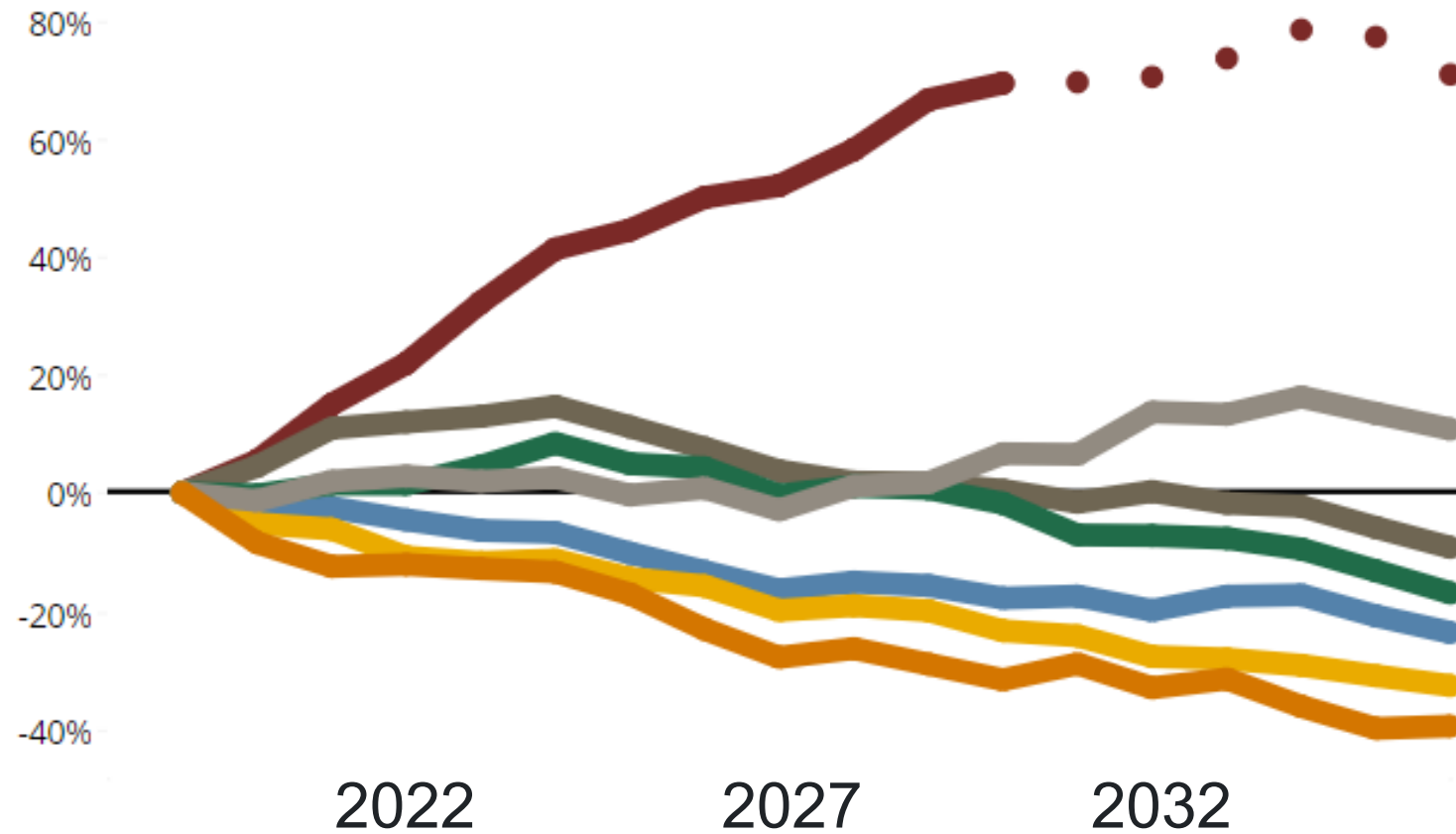
Two or More Races !N/A

AI/AN ▼ -15%

State Variation: California



Projected Change in Graduates vs. 2019: California



Two or More Races !▲71%

Asian/PI ▲11%

Black ▼-33%

Hispanic ▼-17%

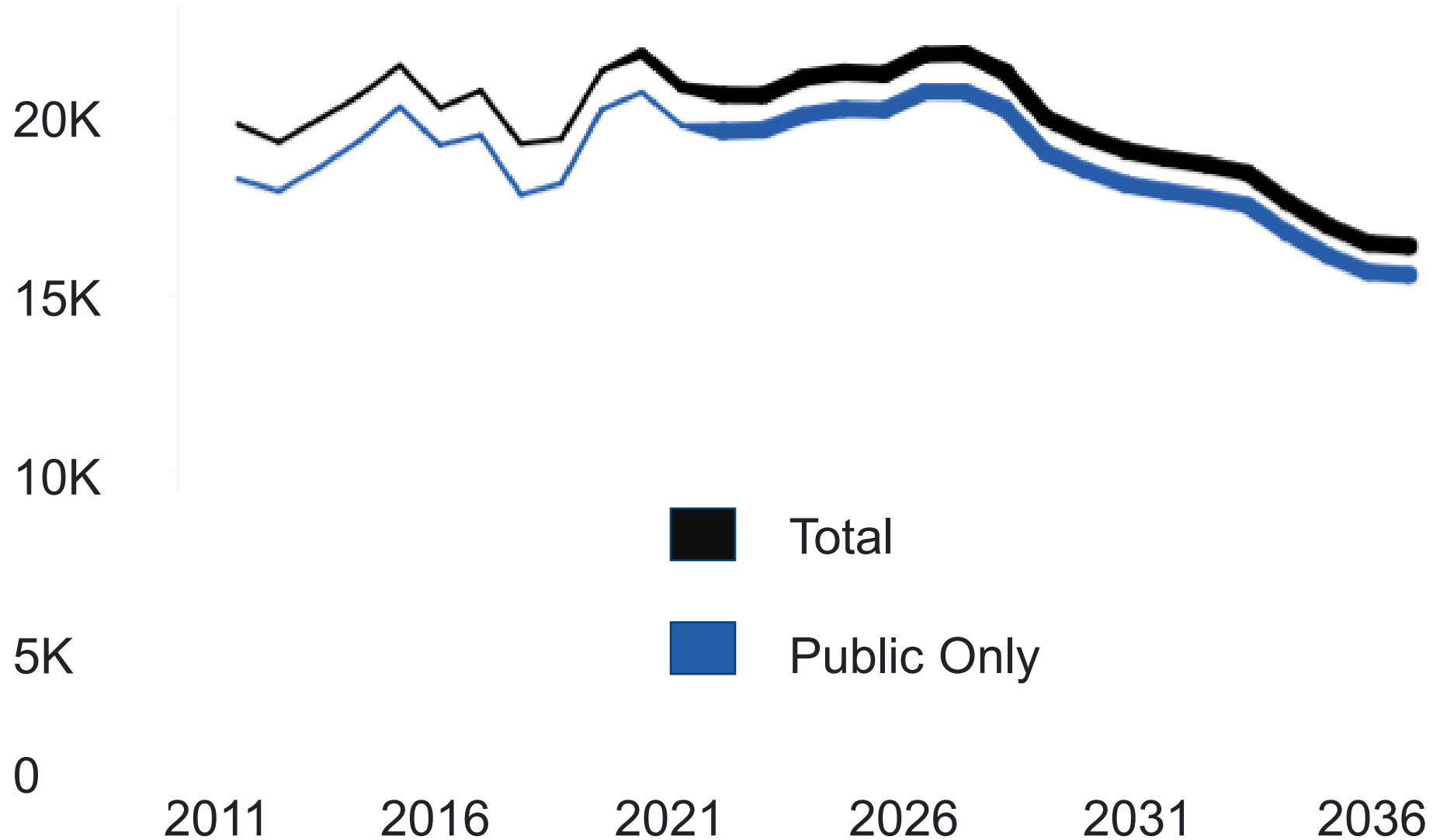
Public Schools Total ▼-14%

AI/AN ▼-39%

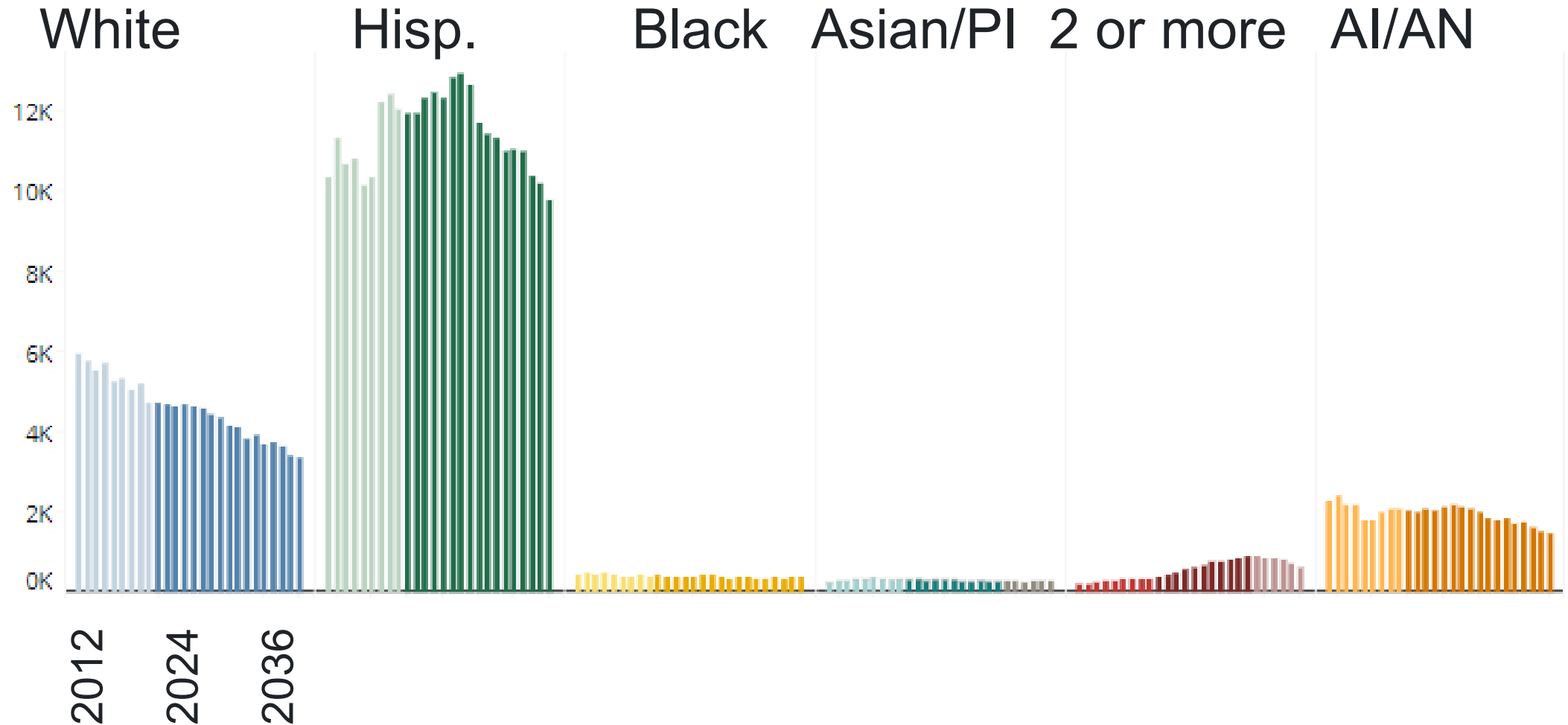
White ▼-24%

Private HS Grads ▼-9%

State Variation: New Mexico



State Variation: New Mexico



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

■ White & Asian ■ White & AI/AN ■ White & Black ■ White & NH/OPI

■ White & 'Some other race'

□ All other multiracial identities





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 11th 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

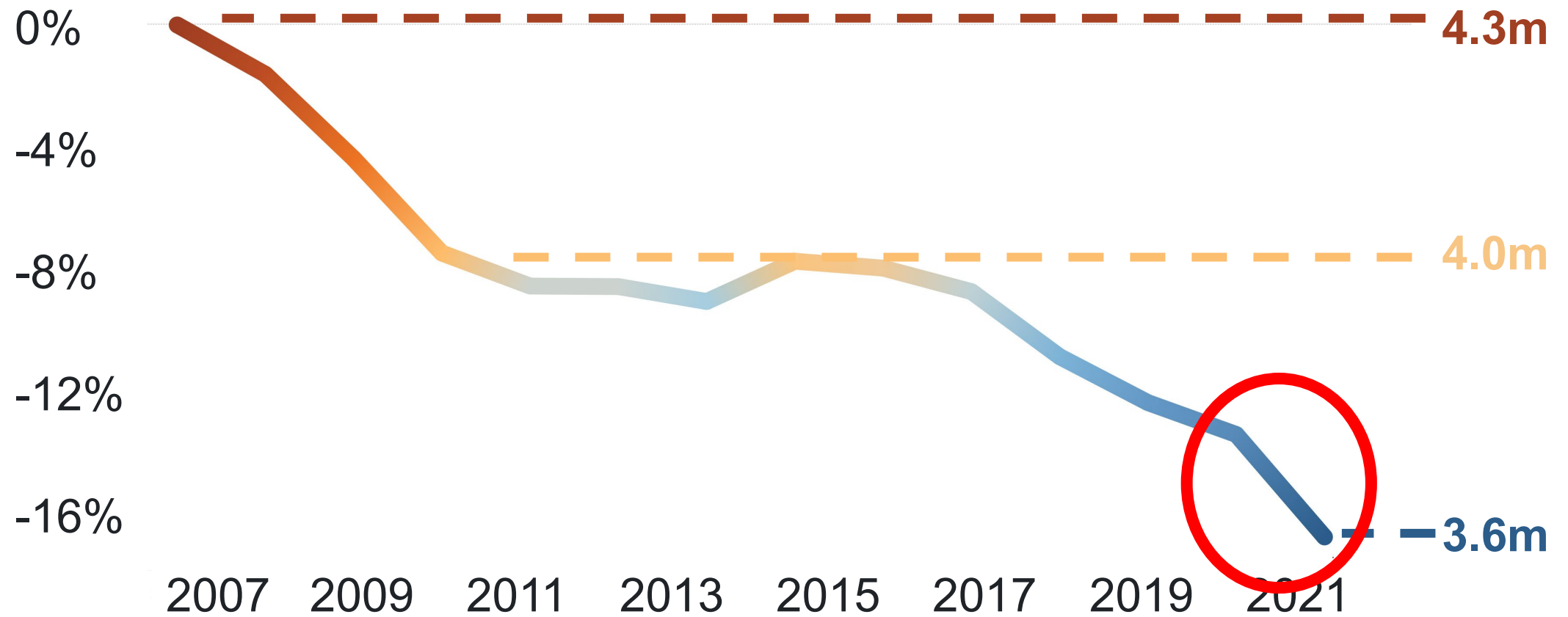
- Declines concentrated at for-profits and public 2-yr institutions
 - For-profits down 10.8% vs. Fall 2019
 - 2-yrs down 14.8% vs. Fall 2019
- Declines highest among White, Black/African-American, and Native American students

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

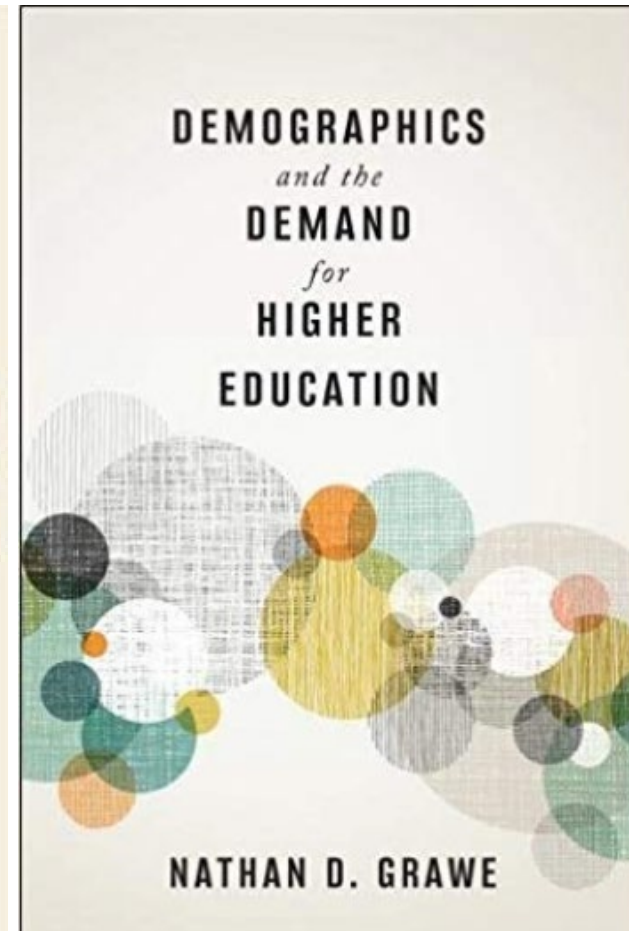
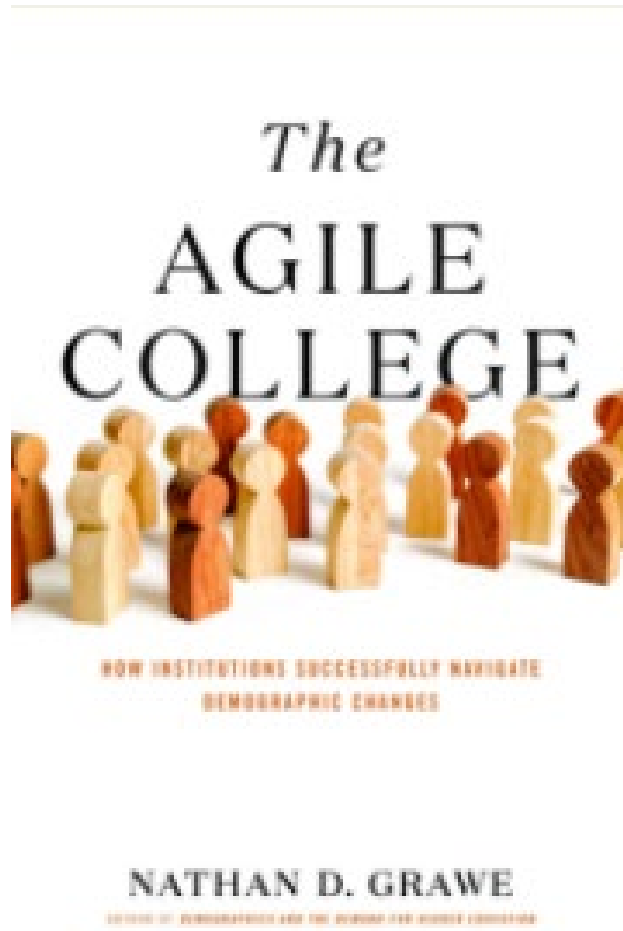
What Will Successful Institutions Do?

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

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Discussion Questions

- How will the predicted decreases in college educated individuals impact the larger economy as we enter the latter half of the 21st Century?
- How will the predicted percent increases in college students of color impact higher education?
- We are already seeing small private liberal arts colleges and smaller public institutions struggling. Assuming this trend continues, how will this impact 1) college access; 2) tuition cost; 3) faculty jobs?
- Since college will become a “buyers market” how would you predict universities will respond when competing for students?