Changing Demographics, COVID-19 and Enrollment: 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
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

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

- Strong production of high school graduates for two decades
- Graduation rate increases mitigate contracting youth population
- Birth declines still predict long-term graduate declines
Methodological Interlude
Modest Growth, then Decline

Strong production of high school graduates for two decades
Graduation rate increases mitigate contracting youth population
Birth declines still predict long-term graduate declines

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

18 Years

Great Recession

- Strong production of high school graduates for two decades
- Graduation rate increases mitigate contracting youth population
- Birth declines still predict long-term graduate declines

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

<table>
<thead>
<tr>
<th>Year</th>
<th>White</th>
<th>Hispanic</th>
<th>Black</th>
<th>Asian/Pacific Islander</th>
<th>American Indian/Alaska Native</th>
<th>Multiracial</th>
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</thead>
<tbody>
<tr>
<td>2019</td>
<td>51%</td>
<td>25%</td>
<td>14%</td>
<td>6%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td>46%</td>
<td>28%</td>
<td>14%</td>
<td>6%</td>
<td>5%</td>
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</tr>
<tr>
<td>2030</td>
<td>44%</td>
<td>28%</td>
<td>13%</td>
<td>7%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>2036</td>
<td>43%</td>
<td>28%</td>
<td>14%</td>
<td>8%</td>
<td>6%</td>
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</tbody>
</table>
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

- White: -5%, -14%, -19%
- Hispanic: 18%, 13%, 9%
- Black: <1%, -9%, -8%
- Asian or Pacific Islander (Combined): 9%, 19%, 24%
Projected Change from 2019 by Race/Ethnicity

American Indian/Alaska Native Graduates of Public Schools or BIE Schools

Two or More Races

-4%  -17%  -27%  55%  84%  81%

Asian

10%  21%

Not available for Class of 2036

Native Hawaiian and Other Pacific Islander

6%  2%
High School Graduates: The West

2011       2016       2021       2026      2031        2036
Graduating Class

Total
Public Only
Diversification in the West

Public High School Graduates by Race/Ethnicity

- White
- Hispanic
- Black
- Asian or Pacific Islander
- Two or more races
- American Indian/Alaska Native
State Variation – Pct change 2019-2037

Decline   Level   Growth

[Map of the United States with states colored in different shades indicating percentage change]
State Variation: North Dakota

- Total
- Public Only

Year: 2011, 2016, 2021, 2026, 2031, 2036
State Variation: North Dakota

Asian/PI ▲139%
Black ▲190%
Hispanic ▲318%
Public Schools Total ▲33%
White ▲11%
Private HS Grads ▲82%
Two or More Races N/A
AI/AN ▼-15%
State Variation: California

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Public Only</th>
</tr>
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<tbody>
<tr>
<td>2011</td>
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<td>70k</td>
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<tr>
<td>2031</td>
<td>100k</td>
<td>60k</td>
</tr>
<tr>
<td>2036</td>
<td>0</td>
<td>50k</td>
</tr>
</tbody>
</table>
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

White  |  Hisp.  | Black  | Asian/PI | 2 or more | AI/AN

2012  | 2024  | 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

- White & Asian
- White & AI/AN
- White & Black
- White & NH/OP
- 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?
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

The Agile College

Demographics and the Demand for Higher Education

Nathan D. Grawe
Key Links

1. Main landing page: The main page for accessing the report and the associated resources.
   https://knocking.wiche.edu

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

3. Executive Summary: Key findings and takeaways with high level summary.
   https://knocking.wiche.edu/executive-summary/


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?