

Session 1. An In-Depth Look at the National Enrollment Crisis

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CERPP CONFERENCE 2023

**Standing on Shaky Ground: Leading
Enrollment Management in 2023**

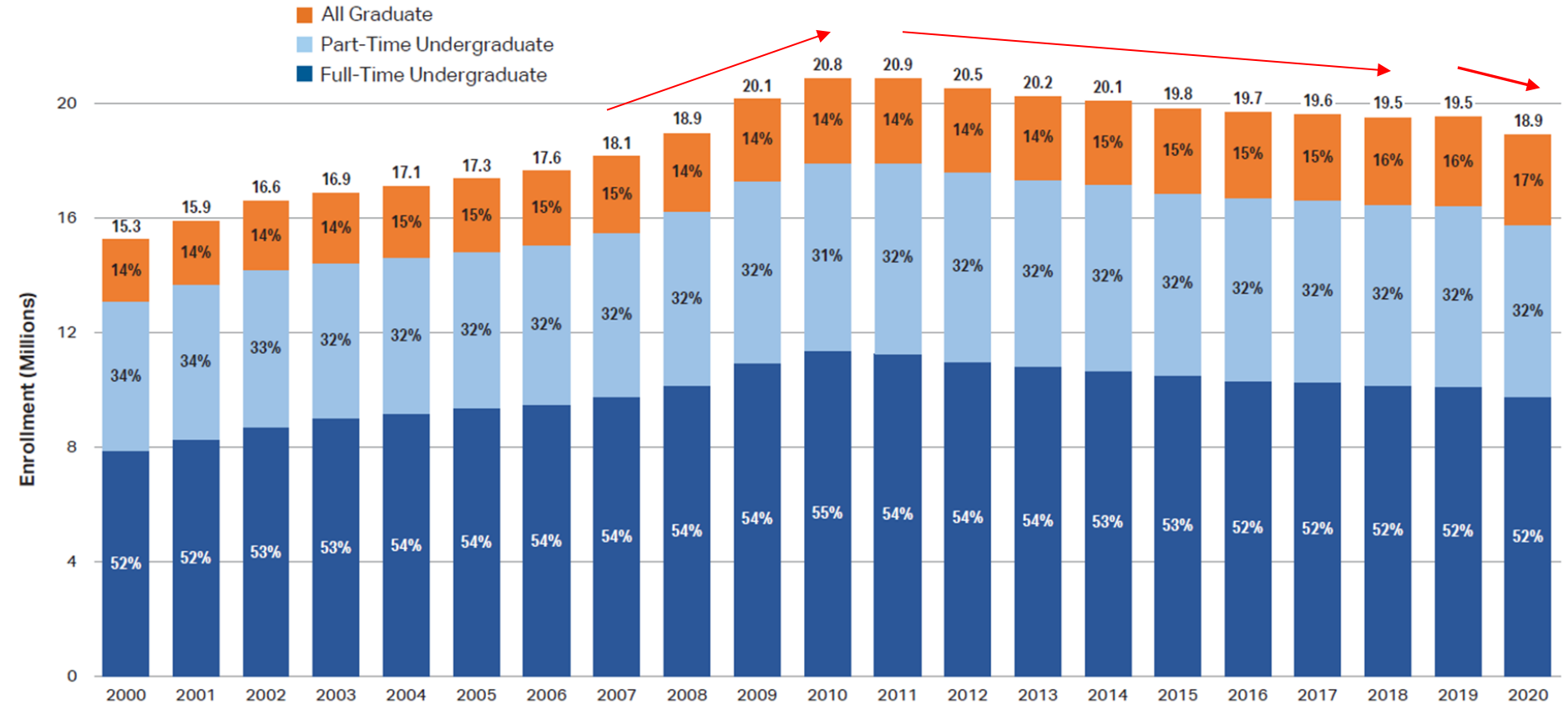
February 5 - 7

Los Angeles, CA

Total PSE Enrollment Peaked in 2011

Then declined gradually until the pandemic hit

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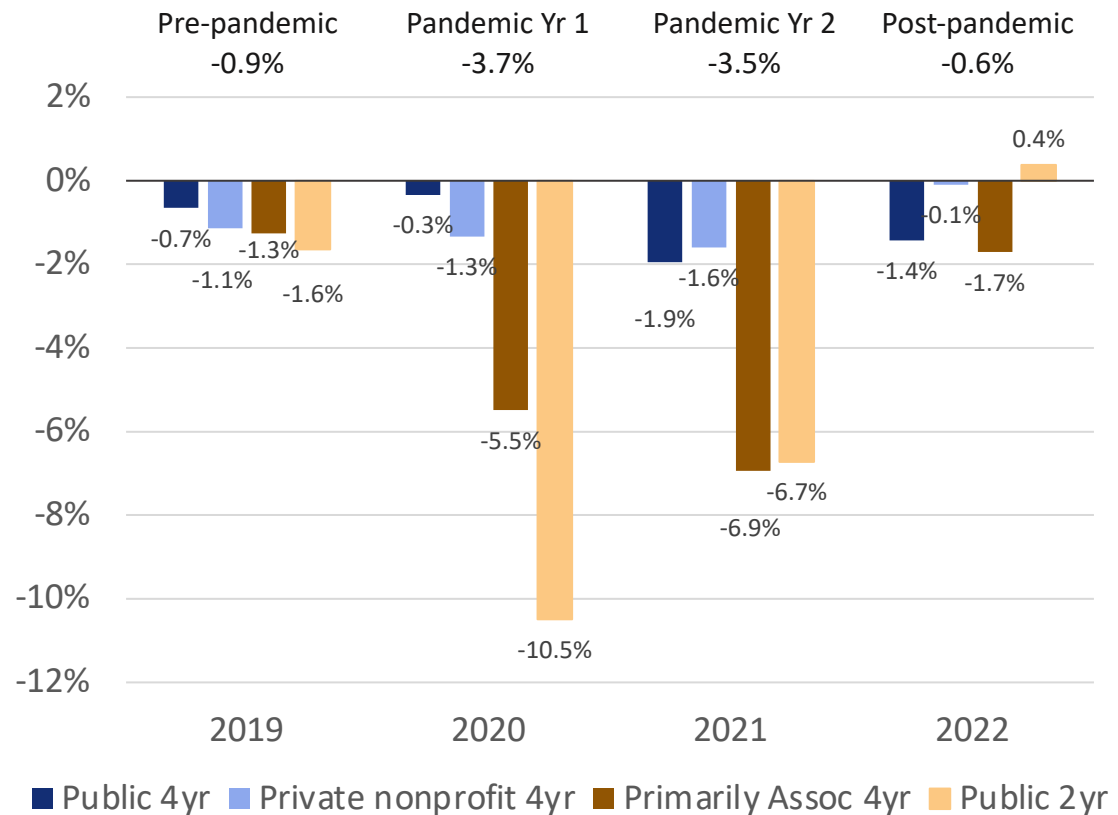
Undergrad Declines Slowing in 2022

Losses shift to bachelor's programs

- In the first year of the pandemic 90% of the lost degree students were seeking associates.
- Since then, the balance has steadily shifted to proportionately more bachelor's-seeking losses.
- In 2022, 73% of the losses were among those seeking bachelor's degrees.
- **Total decline: 1.2M undergrads (-7.6%) since 2019**

Public 4yr	-3.7%
Private NP 4yr	-3.0%
Primarily Assoc 4yr	-13.6%
Public 2yr	-16.2%

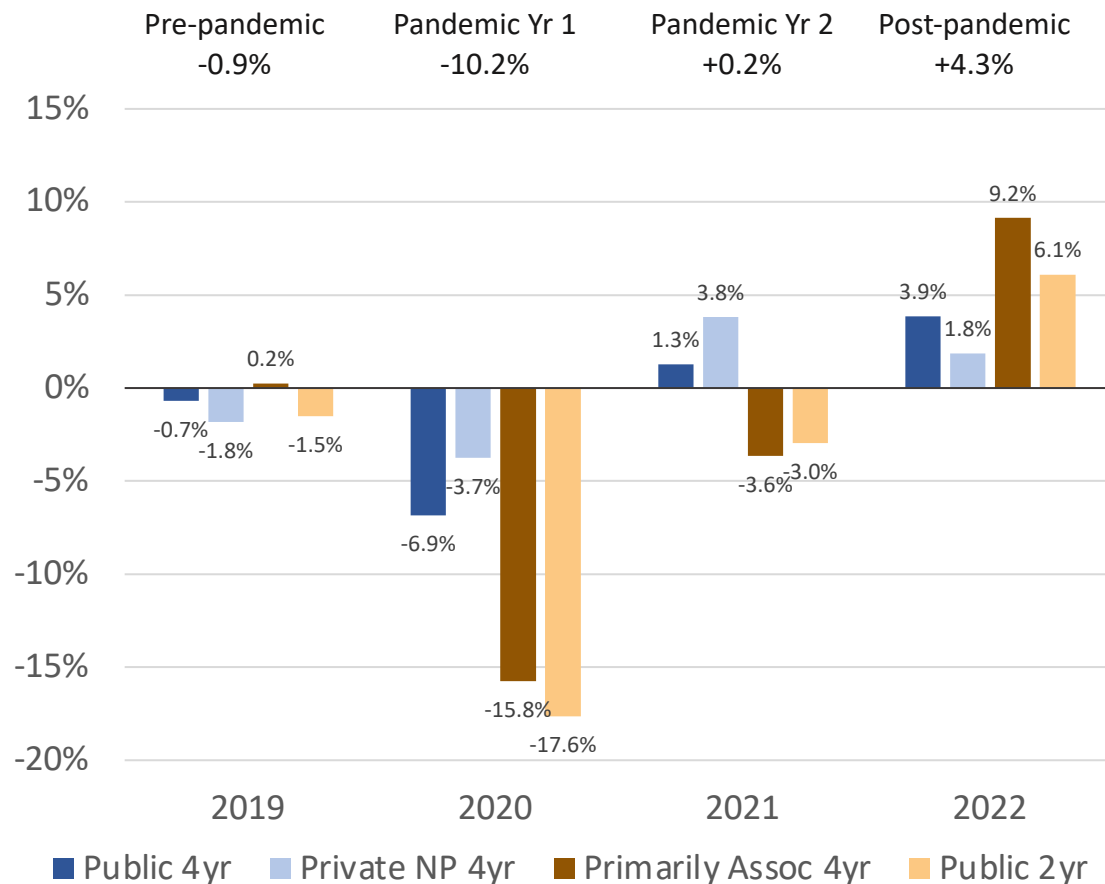
Total Fall Undergraduate Headcounts
Year-Over-Year Percent Change



Signs of Recovery in Freshmen Classes

Enrollment up 4.3% in 2022

Total Fall Freshmen Headcounts
 Y-O-Y Percent Change



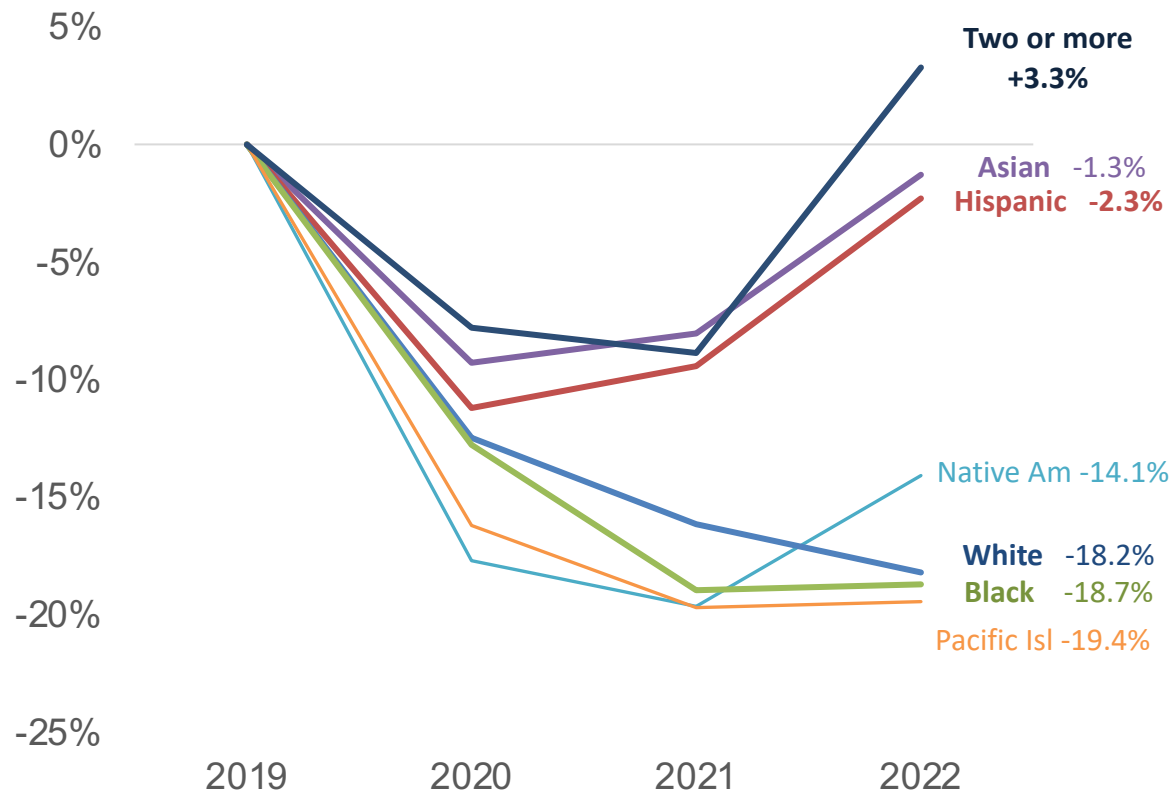
- Large increases in all four sectors
- After huge declines in 2020, however, there is still a long way to go before returning to pre-pandemic levels.
- Total entering class is now 6.0% below 2019:

Public 4yr	-2.0%
Private NP 4yr	+1.8%
Primarily Assoc 4yr	-11.4%
Public 2yr	-15.2%

Racial/Ethnic Trends Diverged in 2021 and 2022

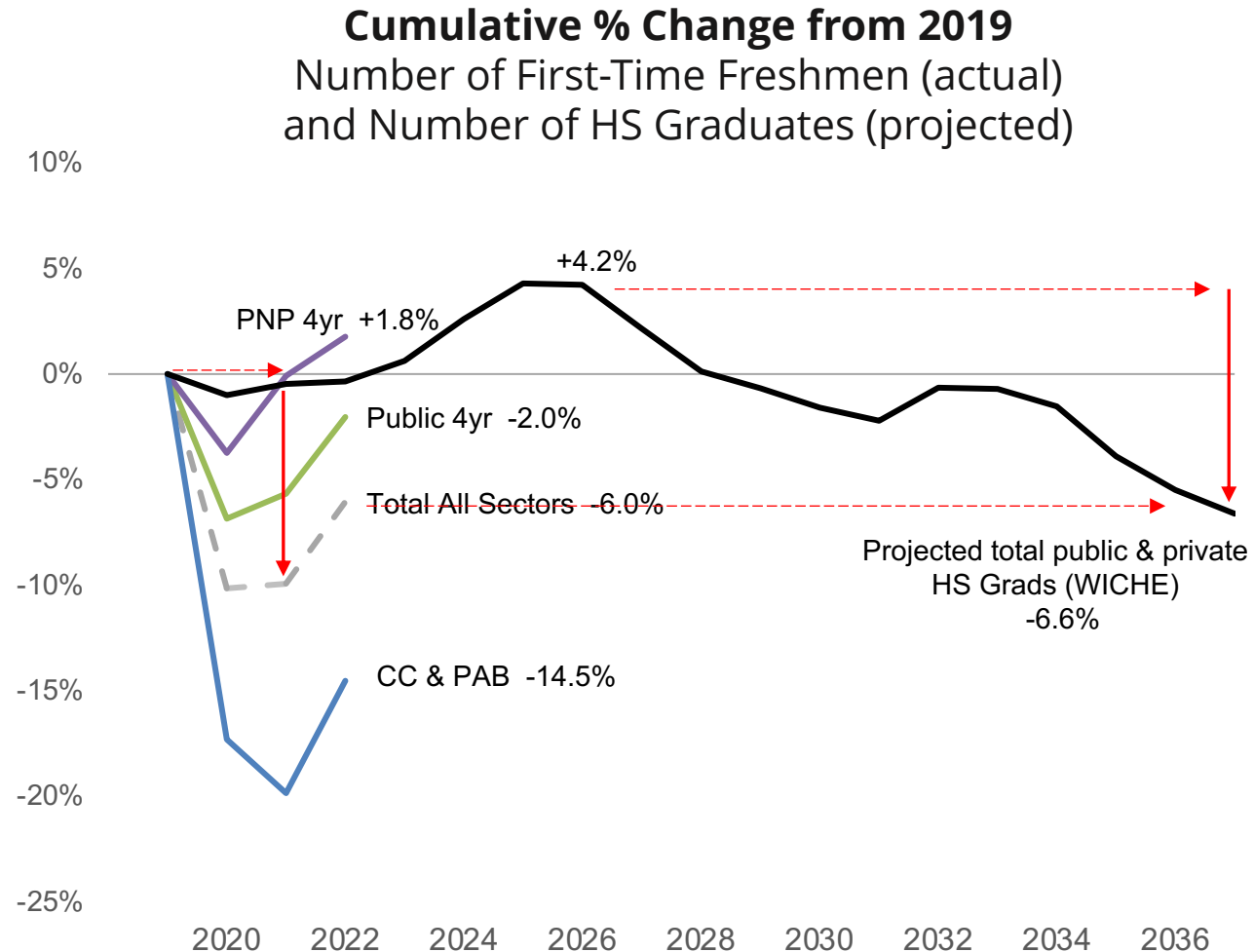
- All five of the largest categories followed roughly similar declines in 2020, ranging from 8% (Two or more) to 13% (White & Black)
- Since then, Asian and Hispanic freshmen have largely returned to 2019 levels, and “Two or more” has exceeded them
- White and Black continued to fall
- All sectors follow this general pattern, but the degree of divergence varies somewhat:
 - At **PNP 4yrs**, Asian and Hispanic are now 6% and 10% *above* 2019 levels (resp.); White and Black down 9% and 11% (resp.)
 - At **Public 4yrs**, Blacks are down only 9%, about half the White decline of 17%; “Two or more” is up 12%
- **Caution:** R/E are missing for about 20-25% of freshmen in NSC data. This share has risen by about 6 ppts since 2019.

Total Fall Freshmen Headcounts by Race/Ethnicity
 Cumulative % Change from 2019



The Demographic Cliff?

- Much worse than the WICHE projected demographic decline in HS graduates
- Even with the “recovery” in 2022, we’re now sitting, after just three years, all the way at the bottom of the cliff, 15 years away
- We already ran the full cliff (starting from the peak) – 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 holds only ~600,000 students, just half the size of the current total undergraduate enrollment gap of 1.2M



Only the Most Selective Thrive?

- In the first pandemic year, all categories declined at about the same rate.
- The “highly selective” institutions rebounded in 2021, while all the rest continued to fall.
- The pattern is growing even more divergent in 2022.

All Undergraduates Enrolled in Fall Term Y-O-Y % Change

Public & Private NP 4yr by Barron’s Category

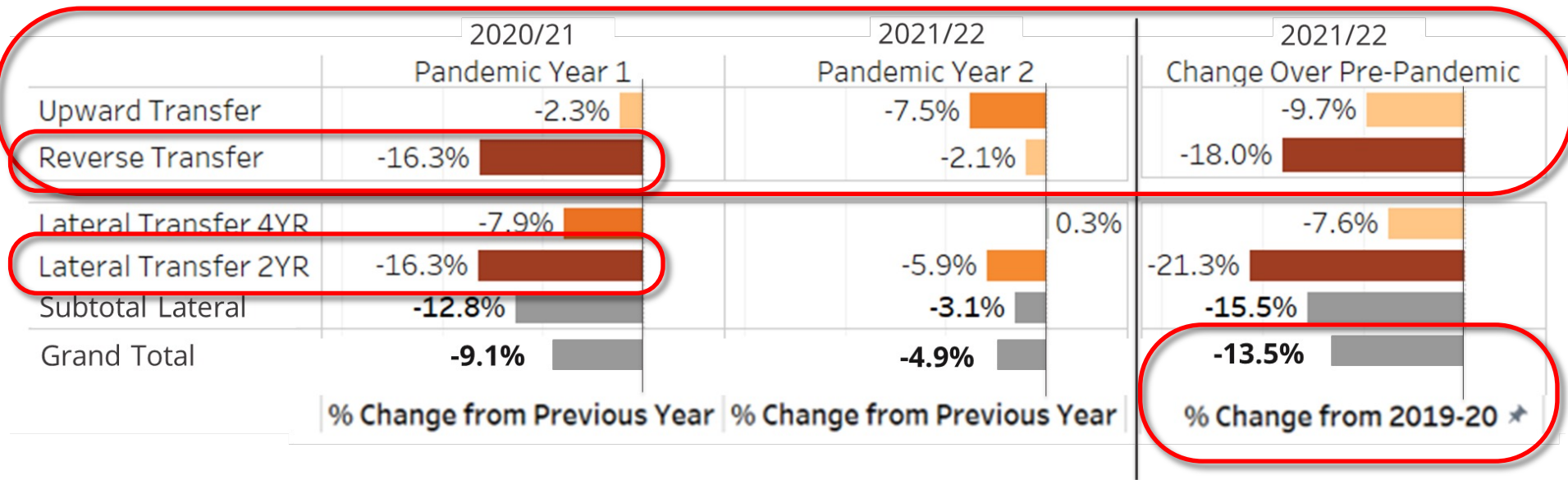


Pandemic's Effects on Transfer

- **Fears in Spring 2020** that pandemic disruptions would cause more reverse and lateral transfers, but fewer upward transfers, constricting accessible pathways to bachelor's attainment
- **Year 1: The opposite happened**
 - Reverse and lateral transfers fell
 - Upward transfer was relatively stable
- **Year 2: The other shoe dropped**
 - Reverse and lateral transfers stabilized
 - Fewer community college students led to drop in upward transfers



Total transfer enrollment declined by 296,000 students over two years



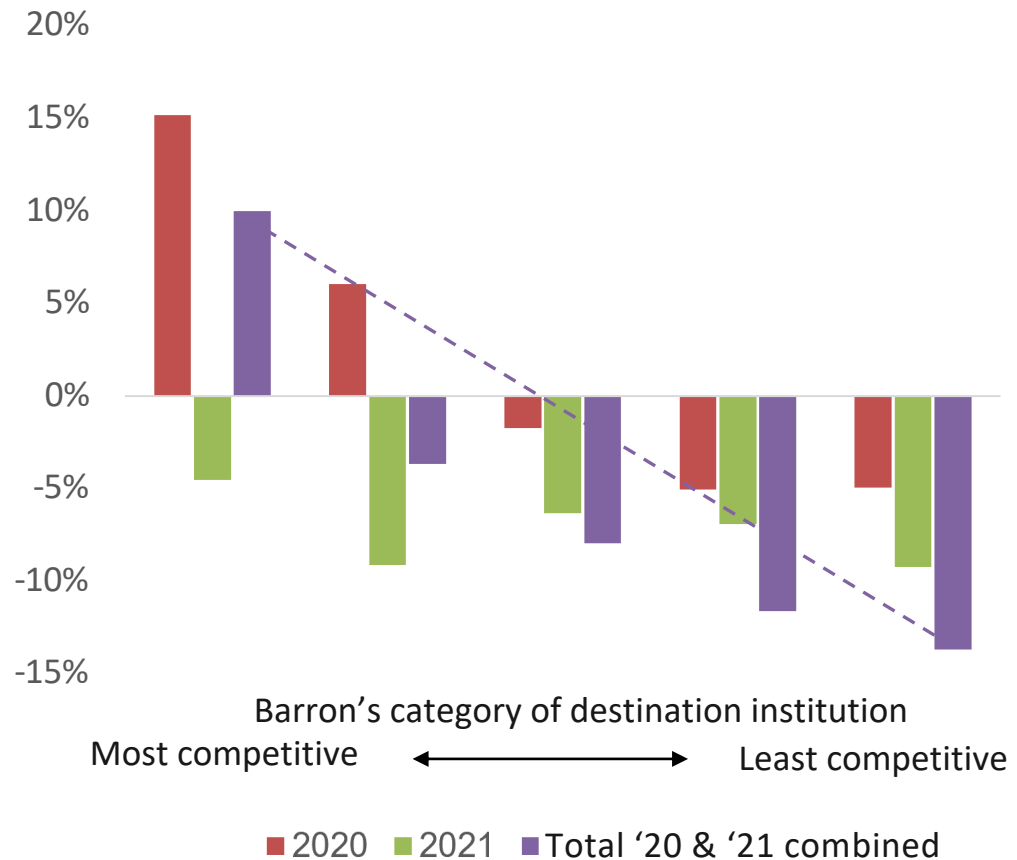
Divergence by Selectivity and Race

- The most-selective four-year schools gained upward transfer students in Year 1, while less-selectives lost.
- State disparity

	<u>Two-year change</u>
— Out-of-state	-0.7%
— In-state	-12.3%
- Race disparities

— Native American	- 15.6%
— Black	- 13.9%
— White	- 13.6%
— Hispanic	- 6.1%
— Asian	- 3.4%

Y-O-Y % Change in Upward Transfer Enrollment



Key Points

And Some Reflections on Driving Factors

- 1. Pandemic** forces picked up where the economic recovery from the Great Recession left off, accelerating enrollment declines in fall 2020, mostly at community colleges
- 2. Economic** forces, post-pandemic, are widening equity gaps by institutional selectivity, expanding the swath of decline to include less-competitive 4-year colleges
- 3. Demographic** forces are emerging in 2021 and 2022, driving steeper losses among White and Black freshmen, and quicker recoveries among Asian, Hispanic and multi-racial. The “Cliff” may prove to be more insurmountable in the long run than the pandemic, but it pales in severity.
- 4. Transfer** was highly constrained during the pandemic, especially reverse and lateral pathways. Upward transfers provided a “reserve” for enrollments at selective 4-years in 2020, then declined in 2021.

Recent High School Grads



2020



2021



- **High school class of 2020**
 - Final months of senior year disrupted, missed proms/graduations
 - Uncertain transition into college
- **High school class of 2021**
 - Senior year remote/hybrid learning → missed learning
 - Disrupted testing, widespread test-optional admissions
 - Mental and physical health challenges
- **High school class of 2022**
 - Return to in-person learning
 - Testing returns, test-optional remains
 - Mental health challenges and learning loss implications linger

Recent High School Grads' Trajectories To and Progress **Through** College

Research Questions:

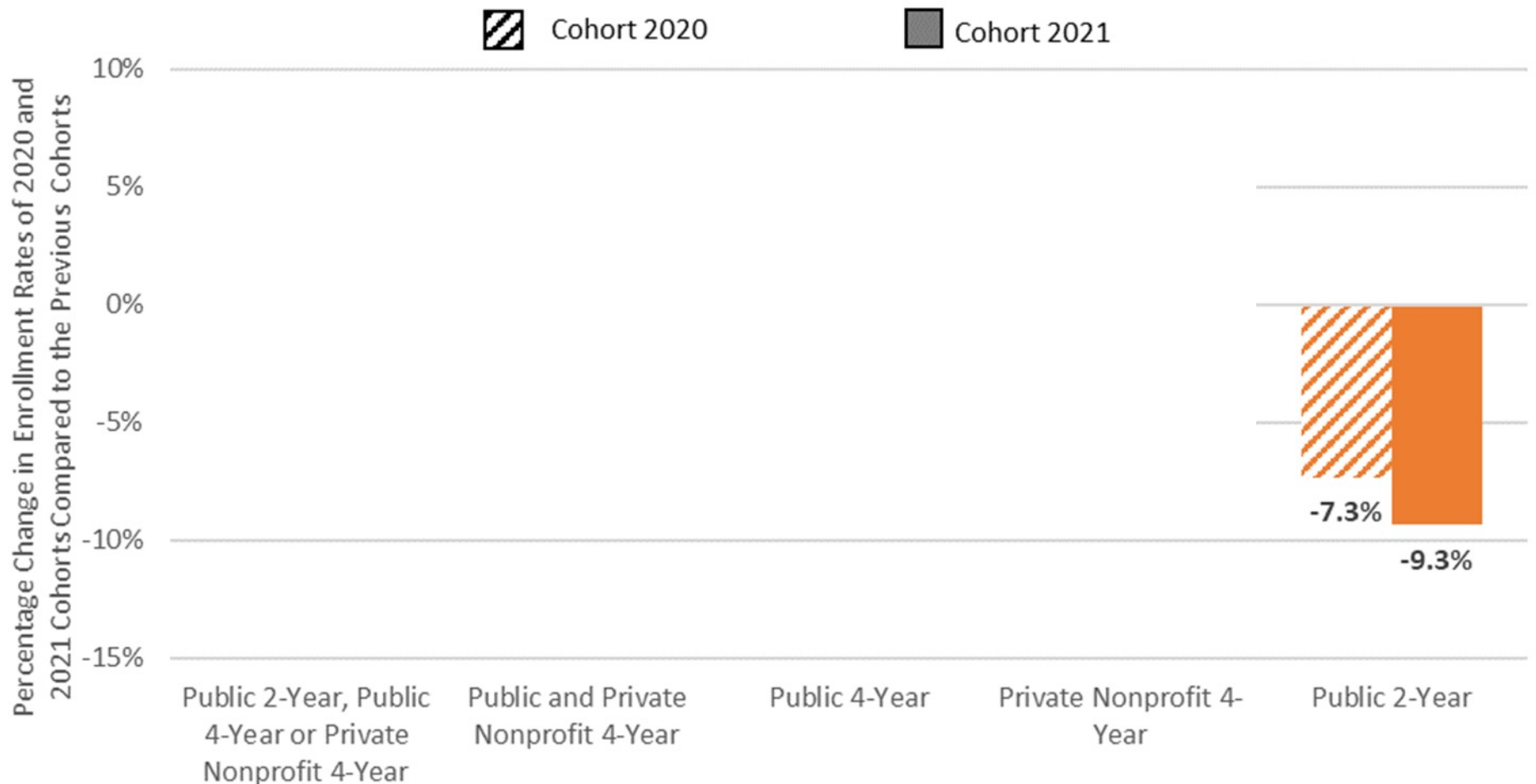
1. How did college enrollment rates change for the class of 2020 and the class of 2021 (after adjusting for pre-pandemic trends)?
2. Are enrollment rate changes different for different types of students in different higher ed sectors?
3. To what extent were these two cohorts of college freshmen retained to their second year?

Data:

PSAT-takers from 2018, 2019, 2020, 2021 cohorts matched to NSC data; rich set of demographic and academic variables

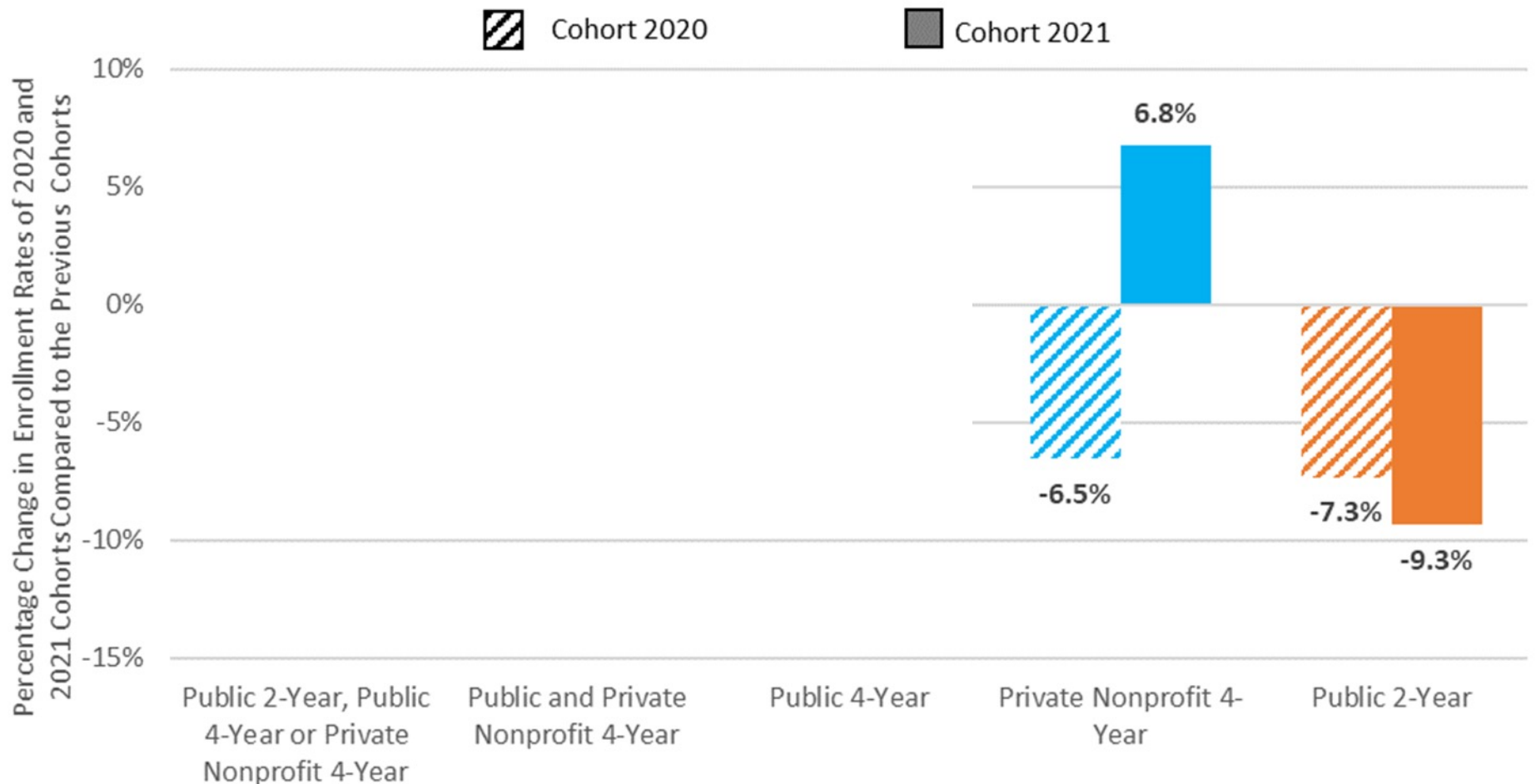
Changes in College Enrollment Rates, Class of 2020 and Class of 2021

Percentage Change in Regression-Adjusted Enrollment Rates Compared to Prior Cohorts, Class of 2020 and Class of 2021, by Sector



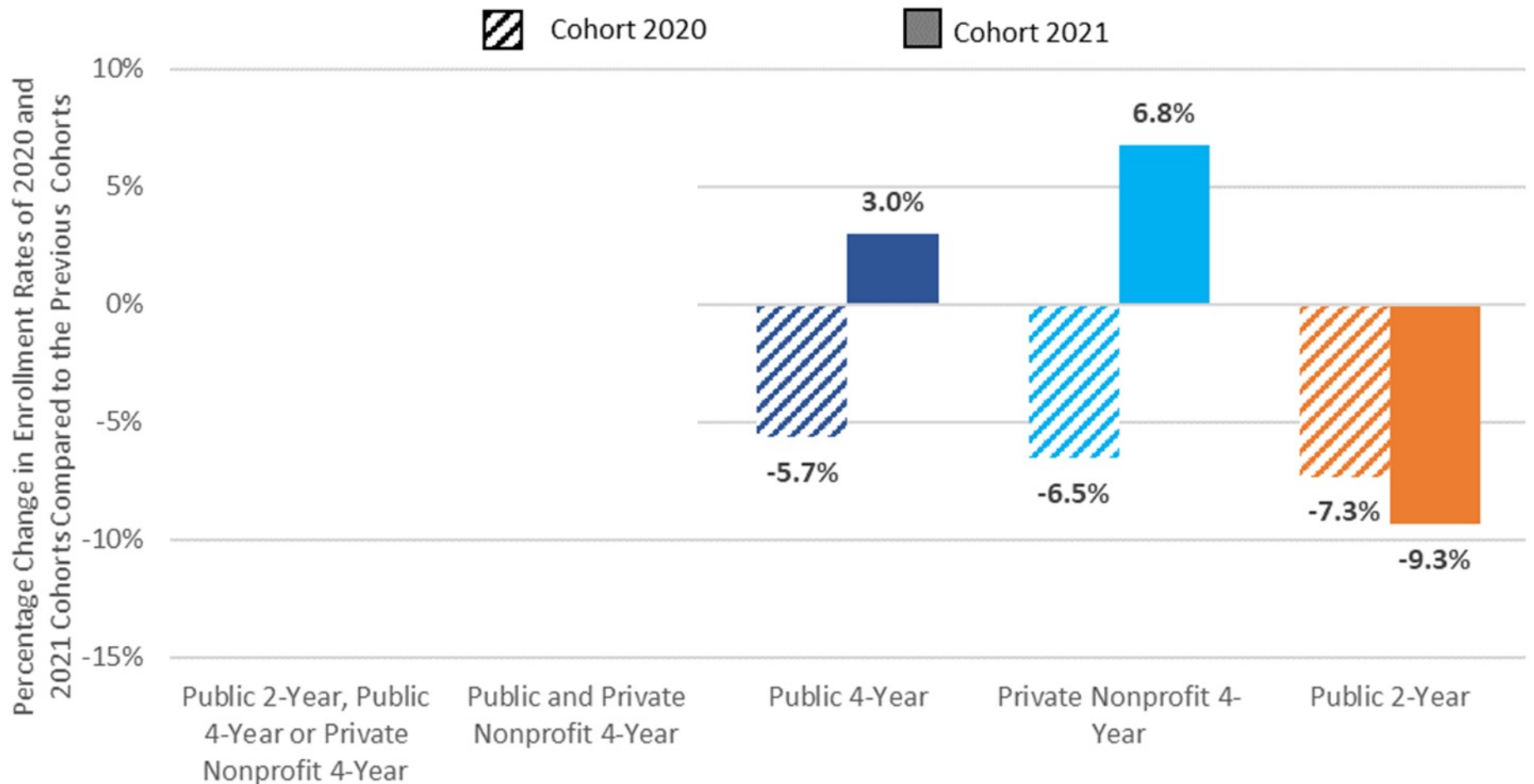
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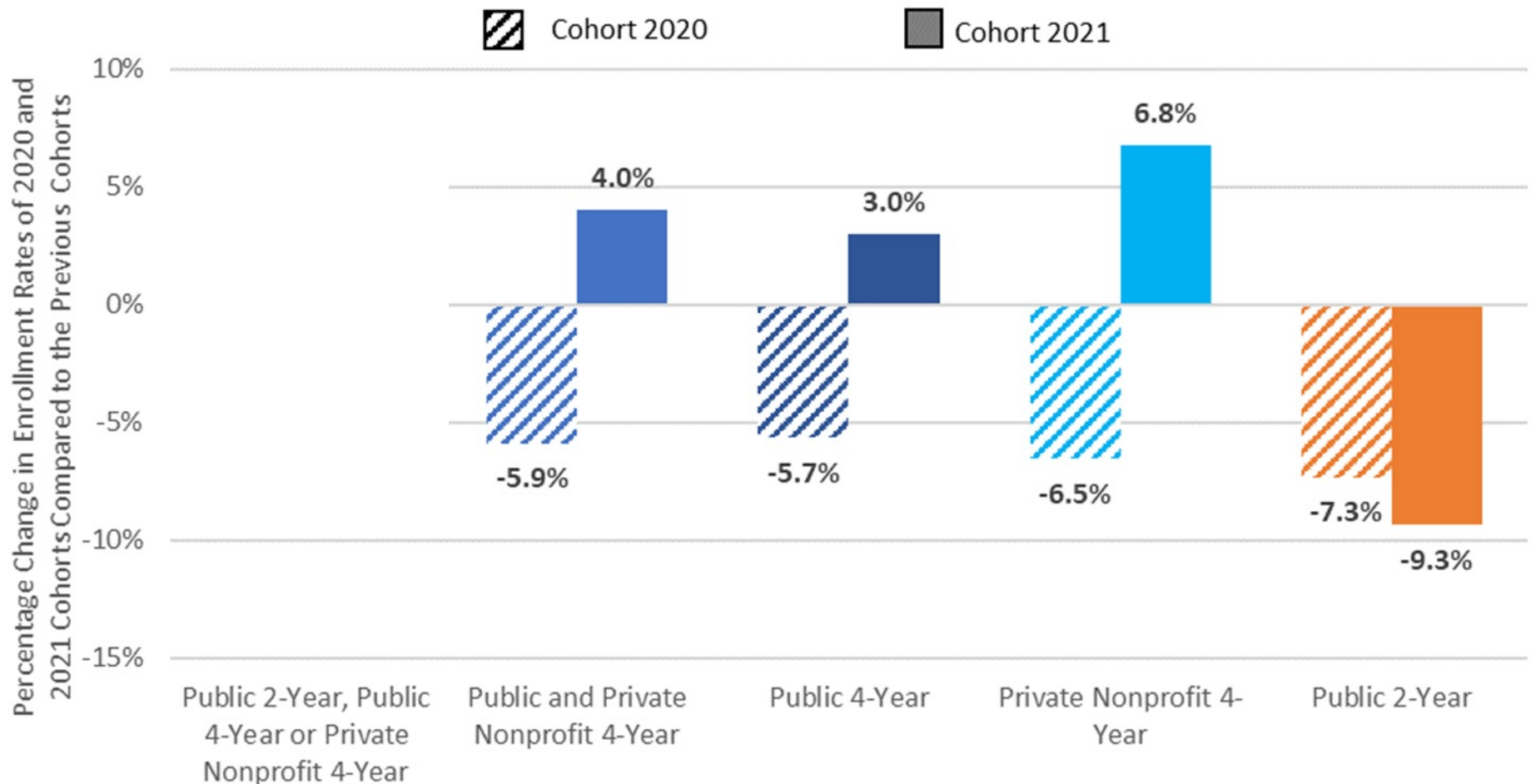
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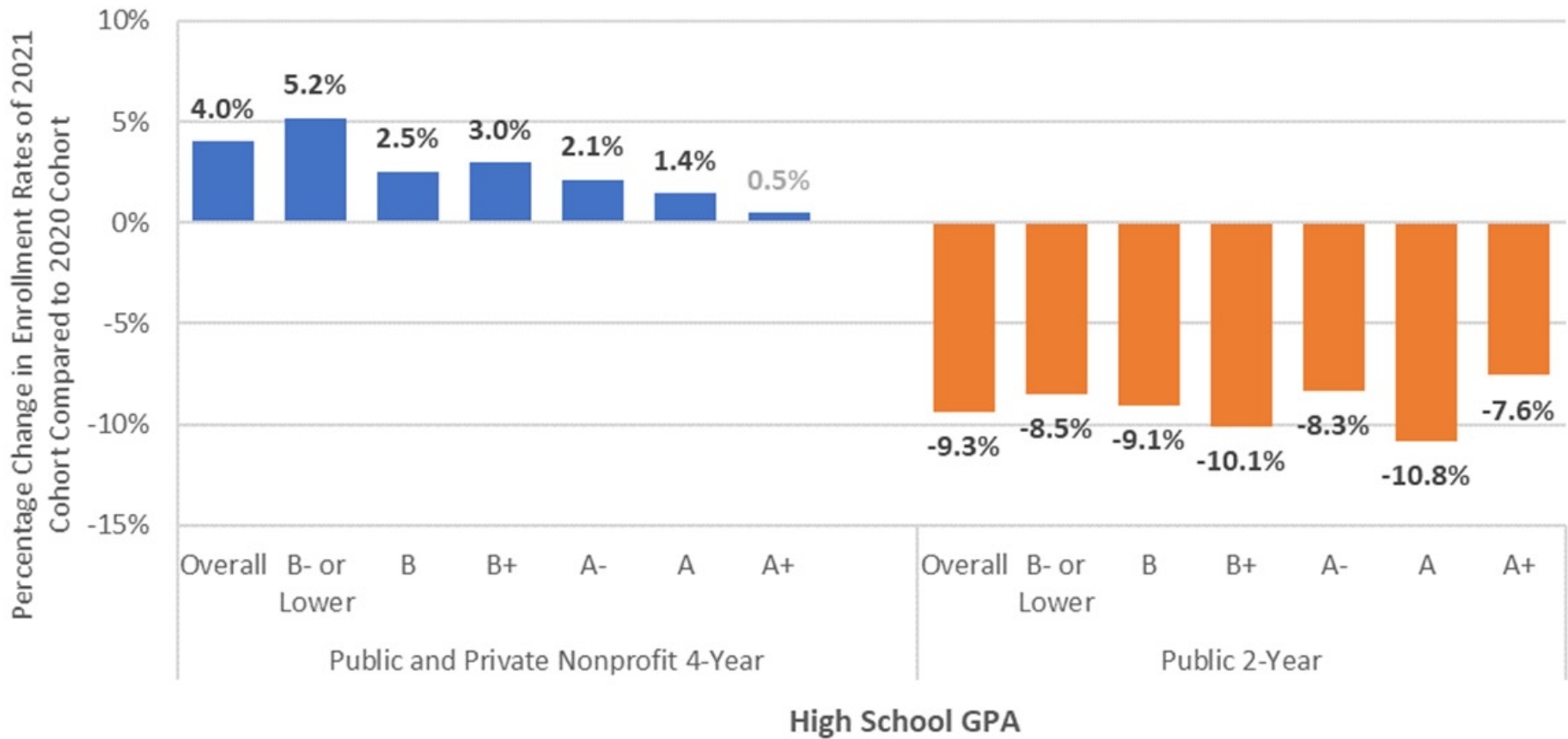


- **High school class of 2020**
 - **Enrollment rate declines nearly across the board, with larger declines among 2-year enrollees**
 - **Exceptions, where enrollment rates increased, occurred among students with modest academic credentials at selective colleges who benefited from stronger students taking gap years**
- **High school class of 2021**
 - Senior year remote/hybrid learning → missed learning
 - Disrupted testing, widespread test-optional admissions
 - Mental and physical health challenges

Changes in College Enrollment Rates, Class of 2021 by Race/Ethnicity



Changes in College Enrollment Rates, Class of 2021 by High School GPA



Recent High School Grads



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2021



- **High school class of 2020**
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 - **Enrollment rate rebounds among 4-year students, but not 2-year students**
 - **Evidence of enrollment rate shifts toward more selective institutions**

Summary of Enrollment Rate Changes

- High school class of 2020
 - Enrollment rate declines
 - Gap year takers with A+s made room for peers with more modest grades
 - First-year retention rates (into fall 2021) declined somewhat substantially, except among academically-stronger students enrolled at more highly resourced institutions
- High school class of 2021
 - Enrollment rate rebounds into 4-years, but not 2-year colleges
 - Evidence of shifting toward selectivity
 - First-year retention rates (into fall 2022) rebounded somewhat to pre-pandemic levels
- High school class of 2022 (preliminary)
 - Enrollment rate increases into 4-year publics, decreases into 4-year privates, and flat into community colleges

Pandemic ushered in many simultaneous changes that are driving student and institution behavior:

1. Changes in admissions policies and practices

- Students navigated test-optional admissions in expected ways
- Colleges thoughtfully examining holistic practices and impact of changes

2. Changes in grading practices and learning modes

- Interrupted learning from remote/hybrid modes puts downward pressure on measures of academic achievement
- Grading generosity during pandemic

3. Changes in financial aid sources and generosity

- HEERF funding disproportionately went to institutions with higher Pell shares
- Colleges credited these relief funds with offsetting enrollment declines and reducing drop-out

Q & A

Question?
Please make your way to an
available microphone.