WHITE PAPER

Uneven Terrain: The Shifting Landscape of Enrollment Trends in Higher Education

SORENSON IMPACT CENTER
DAVID ECCLES SCHOOL OF BUSINESS

Table of Contents

Overview

Threats of undergraduate enrollment decline have dominated higher education headlines for years. A brewing storm of fewer traditional-age students, more alternative options, rising tuition prices, funding challenges, and questions about the value of a college degree are pressuring colleges and universities to maintain viable student populations and adapt along with their learners. Now, the data are starting to bear out some of these concerns, particularly post-pandemic. Since the peak of undergraduate enrollment in 2010, the U.S. system has declined by more than 3 million students or 16.7% of enrollment overall, including 1 million students between the years of 2020-2022 alone.

But are enrollment declines impacting all sectors and types of students in the same way? And what's at stake if things continue in this direction?

This paper charts the shifting landscape of enrollment in higher education, illuminating the disparate experiences of different types of institutions in a system that is too often treated as monolithic. This paper also covers enrollment trends for students with an intersectional demographic lens, exploring trends by race, gender, and type of institution.

Finally, this paper covers innovative strategies for increasing enrollment and retention, as well as system-wide tools designed to support the sector as a whole in reviving and better serving an increasingly diverse student population.

These tools include the **MAPS Student Trends and Enrollment (STEP) Dashboard**, an interactive data tool that visualizes historical enrollment and population trends, forecasts future trends until 2030, and provides insights into student migration flow and online-only education. Using IPEDS, College Scorecard, and US Census Data, the STEP Dashboard allows users to understand how the relationship between the population and college and enrollment is changing and assess opportunities to engage different student groups.

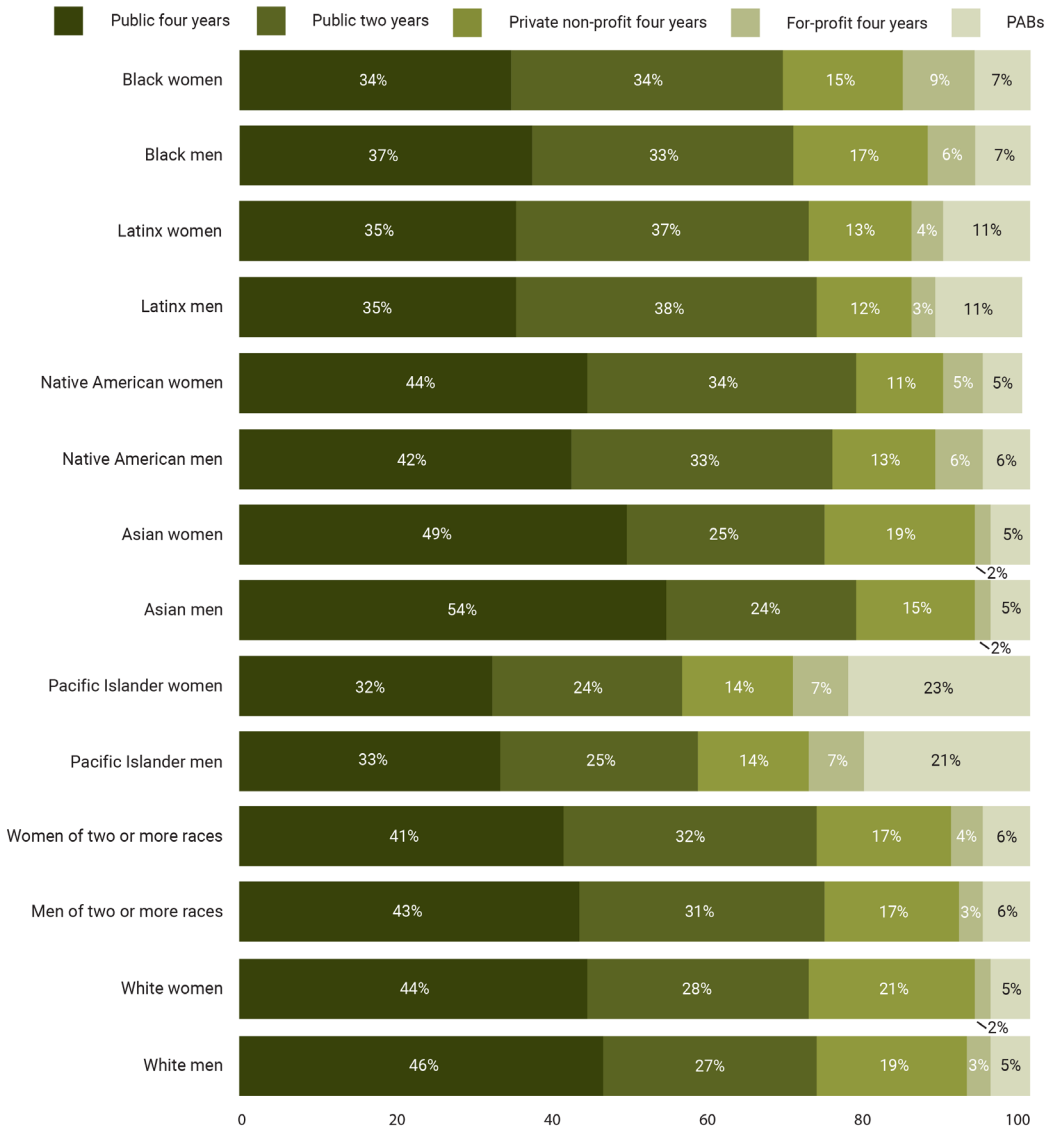
As colleges and universities work to shore up their enrollment strategies, they will be wise to invest in not only recruiting what is an increasingly diverse student population, but in ensuring that they can retain, graduate, and positively impact those students post-graduation. The leaders that can ensure equitable student success and leverage data-driven insights to position themselves to attract and authentically support the students of tomorrow will be most likely to thrive in the future.

PART I: UNDERSTANDING HIGHER EDUCATION ENROLLMENT DECLINES

SNAPSHOT: THE CURRENT STATE OF ENROLLMENT

Undergraduate enrollment in U.S. colleges and universities peaked in 2010 at more than 18.1 million students and has since dropped by 16.7% or roughly 3 million students. A total of 15,050,669 undergraduate students were enrolled in U.S. colleges and universities in the fall of 2022, according to the National Student Clearinghouse (NSC). The 2022 data showed that more women were enrolled than men (57.63% compared to 42.37%), and most students identified as white (42.2%), followed by Hispanic (17.5%), Black (10.5%), Asian (5.8%), 'Other'(5.4%), and American Indian/Alaskan Native (0.6%).

Table 1: Fall 2022 Undergraduate Enrollment Across Institution Types by Gender and Race



The NSC data also reveals enrollment by institution type: more than 70% of undergraduates were enrolled in public four- and two-year colleges and universities in 2022, with about 6.1 and 4.5 million enrollees respectively. Comparatively, private nonprofit four-year institutions attracted about 18% of undergraduates (2.7 million students), private for-profit four-year institutions attracted around 4% (more than 600,000 students), and primarily associate-degree granting baccalaureate schools (PABs) attracted around 6% (close to 1 million students).

Importantly, enrollment across institution types also varied when looking at both gender and race/ethnicity (see Table 1). Across all race and gender groups, students enrolled most in public four-year institutions, except for among Black women and Latinx men, where public two-year institutions either tied or surpassed public four-year enrollment. PABs typically had the fewest students enrolled. However, Pacific Islander men and women appeared to enroll at these institutions at much higher rates than their peers. Note that international students or students with unknown race, ethnicity, and gender comprised the remainder of enrolled Fall 2022 undergraduate students.

ENROLLMENT TRENDS

As referenced above, colleges and universities throughout the U.S. have experienced an enrollment decline for more than a decade. These declines have generally remained consistent since an enrollment peak in 2011, decreasing by an average of roughly 0.9% per year, with some exceptions during the COVID-19 pandemic. The undergraduate enrollment decline amounted to a total loss of 9.9% between 2011 and 2022.The COVID-19 pandemic temporarily exacerbated this decline, with enrollment declining substantially by 2.6% the first year of the pandemic (between fall 2019 and fall 2020), and by a further 2.5% the following year. By 2022, enrollment had decreased by about 1.23 million students compared to 2019. While the full effects of the pandemic remain to be seen, it does appear that its long-term effect on total student enrollment may be temporary. This is because the enrollment drop between 2021 and 2022 returned to pre-pandemic rates, dropping by just 0.6%.

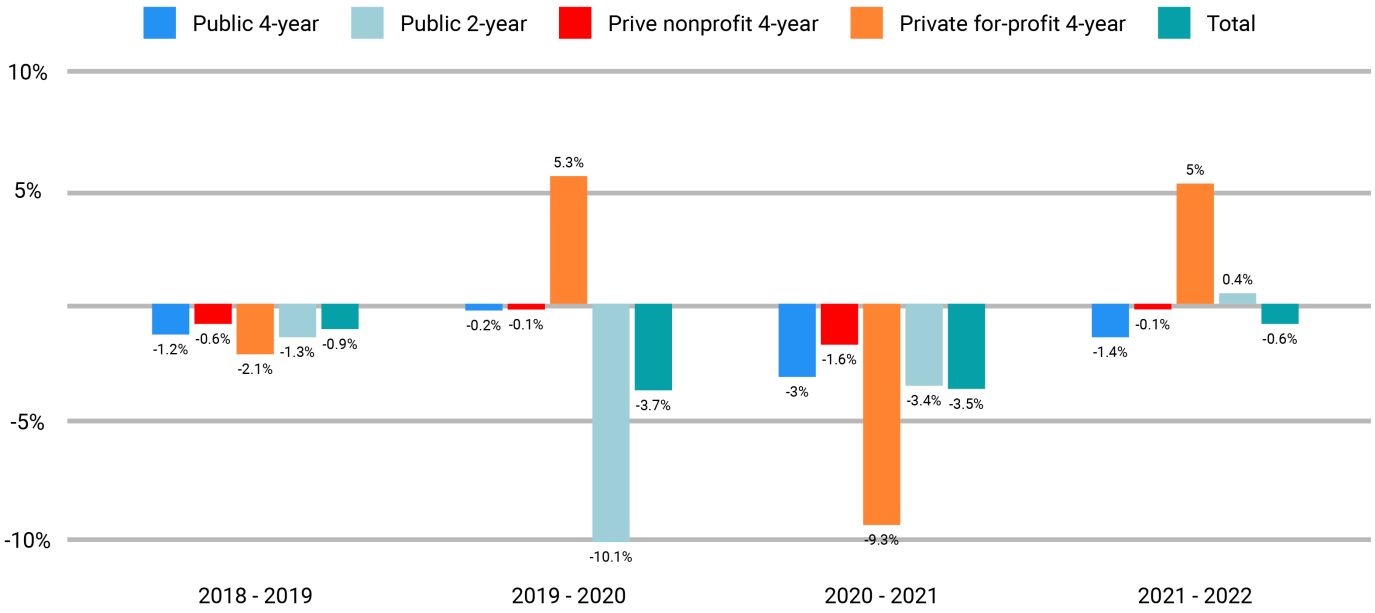
The most recent enrollment rate changes by institution type are demonstrated in Table 2 and Figure 1 below[1].

Table 2: Fall-Term Undergraduate Enrollment between 2019-2022 by Institutional Sector

Sector	Percentage (%) Change from Previous Year	Fall 2019	Percentage (%) Change from Previous Year	Fall 2020	Percentage (%) Change from Previous Year	Fall 2021	Percentage (%) Change from Previous Year	Fall 2022
Public 4-year	-0.7%	6,292,761	-0.3%	6,271,433	-1.9%	6,149,373	-1.4%	6,061,657
Private nonprofit 4-year	-1.1%	2,769,560	-1.3%	2,732,551	-1.6%	2,689,079	-0.1%	2,686,535
Private for-profit 4-year	6.0%	559,447	5.7%	591,513	-1.6%	582,074	5.0%	610,954
Public 2-year	-1.6%	5,315,558	-10.5%	4,757,963	-6.7%	4,438,163	0.4%	4,454,830
Primary associate degree granting post-baccalaureate institutions	-1.3%	1,124,656	-5.5%	1,062,900	-6.9%	989,147	-1.7%	972,231
Total	-0.9%	16,284,724	-3.7%	15,686,317	-3.5%	15,144,221	-0.6%	15,050,669

1 Data in the table is taken from the National Student Clearinghouse's Fall 2022 Current Term Enrollment Estimates.

Figure 1: Annual Percentage Change in Fall-Term Undergraduate Enrollment between 2019 and 2022



TRENDS BY INSTITUTION TYPE AND SECTOR

Not all sectors and types of institutions have experienced enrollment declines to the same degree. The COVID-19 pandemic particularly affected institutions' student enrollment in different ways.

- **Public, four-year institutions:** These institutions continue to enroll the most students overall, with more than 40% of all undergraduate students attending this kind of institution in 2022. Despite continued high numbers of students, these colleges and universities experienced steady declines leading up to and following the pandemic, with enrollment dropping by about 3.6% between 2020 and 2022 (going from 6.29 million to 6.06 million students). However, between 2017 and 2022, for example, annual enrollment declines have never been steeper than -2%, suggesting a slow but steady decline in the past few years.

- **Two-year community colleges:** Two-year public institutions were seeing sharper declines in enrollment compared to other sectors before the pandemic. For example, between Fall 2017 and Fall 2018, enrollment dropped by -9.5%. These institutions experienced the most acute disruptions in enrollment as a result of the pandemic. Total community college enrollment fell by 10.5% between Fall 2019 and Fall 2020, accounting for more than 544,200 students and resulting in the lowest enrollment figures in 20 years. The year between Spring 2021 and Spring 2022 yielded further declines of around 9.5%. Public two-year community colleges in particular lost the greatest number of students, including an outsized share of Black and Indigenous students.

- **Private, nonprofit four-year institutions (including highly selective colleges and universities):** These institutions generally experienced a smaller enrollment drop than other kinds of institutions during the pandemic. Overall, private nonprofit four-year institutions only lost about 83,025 student enrollments (3%) between 2019 and 2022. They also experienced smaller enrollment declines post-pandemic, partially due to an excess of students who deferred their enrollments at the beginning of the pandemic and then re-enrolled later. Applications continue to surge for these institutions, even as critics worry about the growing privilege gap in higher education as these typically well-resourced schools serve an outsized share of students from wealthy families.

- **Private, for-profit four-year schools:** These institutions experienced on average a steady surge in enrollment over the pandemic (apart from a brief enrollment drop in 2021). Most of this was due to pre-pandemic conditions with widespread online learning available at these schools. In 2018, most of their students (72%) were already attending the institutions exclusively online, as compared to just 12% of students at public four-year institutions. These schools continue to appeal to students despite scrutiny from policymakers and a lack of post-graduation results for students.

- **Primarily associate degree-granting baccalaureate institutions (PABs):** PABs are a new school designation that hold some promise for students' outcomes. Unlike other institutions, PABs saw some modest enrollment growth between Fall 2017 and Fall 2018, but this trend may be tied to changes in the Carnegie Classification of this group. In 2017, 114 PABs were identified, while that number rose to 146. This increase may partially explain the 31.1% increase documented. In the same way, between Fall of 2020 and Fall of 2021, the number of institutions fell from 142 to 128, which may account in part for the documented -6.9% decrease in enrollment.

ENROLLMENT DECLINES IN RURAL COLLEGES AND UNIVERSITIES

Rural colleges and universities have mirrored the trendlines of urban institutions of the same type in many ways, but overall losses have been more significant. Researchers from the University of Wisconsin-Madison found that from the Great Recession through 2019, rural public associates and public Bachelors/Masters institutions experienced enrollment declines, while rural-serving doctoral institutions demonstrated overall steady growth. However, the overall percentage change in enrollment has declined more steeply for rural public associates, nonprofits, bachelors/master and doctoral institutions than for urban institutions of the same types. For-profit institutions have seen a similar rate of enrollment decline across rural and urban types, with rural for-profits experiencing some growth during the pandemic.

TRENDS BY STUDENT DEMOGRAPHICS

Just as different types of institutions continue to experience enrollment declines differently, the data suggest enrollment declines are not spread equally among all groups of students.

Gender Enrollment Differences

College enrollment and attendance rates have long varied by gender[2]. In recent decades (since the 1980s), women have enrolled in colleges and universities at higher rates than men. This enrollment gap has increased in recent years. For example, women's enrollment exceeded men's by half a million students in 2009 and increased by about 22% to a difference of around 2.19 million by 2022.

Enrollment over the course of the pandemic was no different. Despite the unique challenges that many women faced such as a lack of childcare options[3] and higher poverty rates, women still enrolled at higher rates than men. In the 2021 Spring semester, female enrollment exceeded male enrollment by 3.2 million students. The following Spring (2022), that gap dropped to 2.9 million. While it is worth noting that female enrollment dropped between the fall of 2021 and 2022, women, in particular women of color, have appeared to re-enroll at nearly twice the rate of men.

The reasons for the post-secondary education gender enrollment gap are still not fully understood, and the trend appears to be global rather than unique to the United States. But there is some research that suggests possible contributing factors for why enrollment differs by gender. Research from the Brookings Institution found that contributors include men graduating from high school at lower rates, while the Hechinger Report has found that many men feel pressure or prefer to start earning immediately post-high school. Black men's enrollment in particular has dropped steeply, with research from the Chronicle of Higher Education citing a complex mix of under-resourced schools, fewer role models, narrow messages about masculinity, threats of police brutality and incarceration, and racism all playing a role.

Race and Ethnicity Enrollment Differences

Enrollment and attendance rates also vary by race/ethnicity. A Pew Research Center report found that for college attendance rate by race, Asian students enrolled at the highest percentage (58%), followed by white students (37%), Black students (33%), and Hispanic students (32%). There was no data on the enrollment rate of Native American or students categorized into the 'other' category in 2022.

Enrollment rates have differed across race and ethnicities over time. For example, American Indian/Alaska Native, white, and Black student enrollment rates decreased between 2009 and 2020. American Indian/Alaska Native students had the highest enrollment rate decrease, dropping by 43% over this time period. Next were white students (-25% enrollment), followed by Black student enrollment (-21% enrollment).

2 The MAPS Project team recognizes that many data systems do not reflect modernized gender identity terms and can obscure the experience of folx who do not identify as male or female or women or men. However, due to these limitations, this paper organizes gender identity of students into male and female and man and woman in an attempt to disaggregate where currently possible.

3 While access to childcare should not be framed solely as a women's issue, the data suggest that women continue to take on an outsized share of child care responsibilities, even when both they and their partner have formal paid work responsibilities.

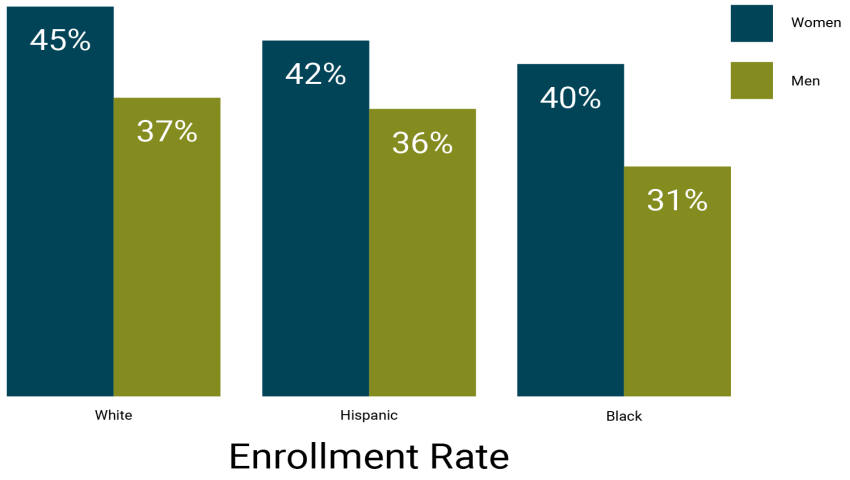
During this same period, the enrollment rates for Hispanic students increased, and the enrollment rate of Asian and Pacific Islander students remained stable[4]. NSC has changed the way it collects data on students, making it difficult to fully understand trends – for example, data was not collected on students of two or more races in 2009 – but this diverse group is growing substantially in both the general population and in college enrollment.

Intersectional Enrollment Trends

In higher education, averages often mask important intersectional narratives that lead to a deeper understanding of enrollment trends and student needs. Disaggregating data to analyze student trends by gender and race jointly shows that pathways diverge when gender and race are both considered. For example, the Journal of Blacks in Higher Education found that Black women earn bachelor's degrees at double the rate of Black men.

Across all racial groups, women have generally enrolled at higher rates than men since 2010. Recent enrollment data from the National Center for Education Statistics for 2020 about 18-24 year olds reflect these gender and race enrollment disparities. The NCES data shows that among women of that age in the full population, white women had the highest enrollment rate (45%[5]), followed by Hispanic women (42%), and

Figure 2: 2020 Enrollment by Race and Gender among 18 - 24 year-olds



Black women (40%). The MAPS research team could find no data about gender differences in enrollment for Asian students in 2020, but it is likely that this group had the highest enrollment rate of all based on data from previous years. In that same year, white men had the highest enrollment for men by one percentage point at 37%, followed by Hispanic men (36%) and Black men (31%).

4 These trends are based on a 2022 Report by the National Center for Education Statistics and state enrollment change since 2009. The enrollment rate for all ethnicities, including Hispanics and Asian/Pacific Islanders, decreased between the fall of 2019 and 2020.

5 This percentage and the following percentages in this paragraph represent a proportion of that respective demographic within the civilian 18-24 cohort. In this case, 45% of 18-24 year-old white women were enrolled in some college or graduate studies.

Comparing men and women of the same race/ethnicities to each other, Black men's enrollment rate fell behind Black women by 9 percentage points, white men's fell behind white women at 8 percentage points, and Hispanic men's fell behind by 6 percentage points. Enrollment rates for all groups fell between 2010 and 2020 except for Hispanic men and Hispanic women, which grew by 2% and 6% respectively.

Enrollment trends also diverge when looking at distinct groups within larger racial and ethnic categories. These categories often lump together students who have culturally diverse heritages and differing experiences. For example, the term "Hispanic" often captures students of more than 20 racial and ethnic backgrounds. When these data are disaggregated, enrollment rates diverge greatly, with data from NCES in 2016 showing a range from 27 percent for Honduran 18- to 24-year-olds to 64 percent for Chilean 18- to 24-year-olds. Another report from the Campaign for College Opportunity noted that the racial category Asian often includes students from more than 30 different ethnicities with widely varying transfer and completion rates, as well as differing experiences and outcomes.

Contributors to Enrollment Disparities

The reasons for enrollment disparities overall are complex and tied to systemic inequities and interactions of race, class, gender, parental status, and place. Enrollment disparities are fueled by many factors that disproportionately impact members of underrepresented or historically marginalized groups and continue even if students do enroll. For example, more than one in five college students is a parenting while in college, including nearly half of all Black female undergraduates. These student parents often face higher financial and logistical burdens including a lack of child-care and outsized student debt burden, and they report feeling isolated and disconnected even when part of campus communities. For prospective students, a lack of faculty diversity and representation can be alienating and contribute to self-doubt, a barrier to enrollment according to Strada Impact research. Increasing tuition costs often particularly hamper college enrollment prospects for people of color and underserved groups. Factors involved with increasing costs can also discourage people from enrolling and harm the academic performance of those who choose to enroll. Overall, the differences in enrollment by gender, race, and other factors point to important narratives that researchers and solution builders need to understand and help to change for more equitable student success.

PART 2: CONTRIBUTORS AND CONSEQUENCES OF ENROLLMENT DECLINE AND DISPARITIES

CONTRIBUTORS TO ENROLLMENT DECLINE

Many of the contributors to higher education enrollment decline are nuanced and specific to certain states, schools, and types of students. There are also many systemic barriers that have severely impacted some groups more than others as referenced above. However, three contributors in particular have contributed to enrollment decline most recently on a national scale: demographic changes, rising costs, and shifting preferences.

Demographic changes

Researchers have predicted that declining birth rates will soon lead to fewer traditional-age students available to enroll in college. Economist Nathan Grawe famously explained these predictions in his Higher Education

Demand Index, a statistical model that predicts an overall 15% drop of college-aged students starting in 2026. Grawe explained that this "demographic cliff" will happen faster in some regions of the country, such as the Northeast and Midwest. This is significant since enrollment growth has historically been driven by a consistent country-wide population increase. At the same time, international student enrollment - which made up about 5.5% of higher education enrollments in 2018-19 - has also dropped significantly post-pandemic. Overall, the enrollment pool of traditional-age students appears to be shrinking. Importantly, the proportion of high school graduates who enroll in colleges or universities also appears to be shrinking, from 70% in 2016 to 63% in 2020. This suggests that not only are there fewer traditional-age students available, but that students in this age group are increasingly impacted by alternative options or deterrents to college enrollment.

Rising Costs and Cascading Effects

Research suggests that the rising cost of higher education is increasingly impacting enrollment. When adjusting for inflation, the cost of college tuition in the U.S. rose by 747.8% between 1963 and 2021, and a growing number of people are concerned about the return of investment of a potential degree. Despite an emerging trend of institutions freezing or reducing tuition prices, students remain concerned about both upfront costs and the long-term implications of student debt. A 2022 study by Edge Research and HCM Enrollment Strategists found that 38% of potential students believe that college was too expensive and they could not afford the debt needed. Another found that the majority of Americans believe that they would experience difficulty paying for tuition today.

The increasing burden of tuition, fees and the threat of debt frequently have an outsize impact on historically marginalized students, including students of color, those from low-income or rural backgrounds, and students enrolled at the least-well-resourced institutions such as community colleges. A 2022 survey from the Center for Community College Student Engagement found that roughly 29% of community college students experienced food insecurity in the last 30 days, while 27% had difficulty paying rent or making mortgage payments in the last year. To compensate, students often work more hours at low-wage jobs, limiting their study time and impacting their academic performance and completion time. Another study by the Hope Center found that 60% of college students reported unmet basic needs, with the highest rates among single Black and Latinx parenting students (up to 90%). Research from the Brookings Institution suggests that disparities in debt can be due to a variety of systemic causes, such as lack of resources, various forms of discrimination, loan interest rates, etc.

Changing Preferences

A third potential factor in enrollment decline is the rise of alternative pathways and evolving student expectations in terms of education delivery.

Potential students are increasingly looking toward alternative options to college despite continued evidence that college degrees provide better long-term earning potential. These include short-term credentials, apprenticeships, bootcamps, and employer-provided certificates. Employers are driving some of this change by offering their own programs and loosening degree requirements - one analysis from Harvard University and the Burning Glass Institute found that up to 46% of middle-skill and 31% of high-skill occupations experienced degree resets between 2017 and 2019. Students also regard on-the-job and job-connected learning as presenting the greatest ROI: the HCM study found that 70% of respondents agreed that on-the-job training provided the greatest advancement and educational value. A strong economy with increasing wages and high-paying entry-level positions has also convinced some potential

students, particularly men, that working immediately is more attractive than pursuing postsecondary education.

Students' preferences on education delivery are also changing, driving greater availability of online and flexible courses and degrees. For example, a 2022 survey by Wiley University that studied college students' learner preferences found that 77% of students said that the choice to study online was the primary factor they considered, preceded only by field of study (82%) and followed by cost (74%), time-to-degree completion (68%), and the college's reputation (62%). The study also found that those who favored online learning generally valued an educational experience that would improve their career prospects, often a priority for working adults, a growing segment of college students. Other students who can benefit most from online options include rural learners, student parents, and students who want to accelerate or slow the pace of a degree, according to research from Western Governors University, the largest online-only university in the nation. Time will tell if the demand for online options and flexibility will help propel colleges and universities through the demographic cliff.

CONSEQUENCES AND IMPACT OF SHIFTING ENROLLMENT TRENDS

As more higher education leaders grapple with the changing landscape of enrollment, they look to the future with both optimism and trepidation. To ensure the survival of their institutions, many are shoring up institutional financial health by cutting costs or by creating new ways to attract and keep students. They are also looking to peers and closely monitoring large-scale shifts in the structure of the overall higher education industry.

Shifting Strategies and Structures

Thought leaders have predicted that enrollment trends and other macro pressures will cause a widespread closure of colleges and universities. Despite a heightening of these threats during the pandemic, predictions about college closures have failed to materialize on a broad scale so far. The college consolidation tracker from Higher Ed Dive has followed nonprofit school closures and mergers since 2018 and reveals that about a third of states have had no closures and another third have had one institution close. Only California, Massachusetts, and New York appear to have had more than a half dozen institutions close. A Hechinger Report analysis found that the rate of closures has decreased since a peak in 2016, suggesting that the pandemic and enrollment trends to date have not accelerated college closures. A more common response to threats of enrollment decline appears to be strategic restructuring, such as layoffs, mergers or acquisitions, new partnerships, or cutting certain majors or programs.

While some worry about the decline of the sector, other leaders point to threats of enrollment decline as an overdue and compelling push to strengthen the value proposition and reach new student segments. Higher education as a sector is often criticized for its "lack of throughput" or results for students: the overall average six-year graduation rate in 2020 was only 64%, according to NCES. NSC reports that more than 36 million students have some college but no degree and represent a key talent pool to re-enroll. Dual enrollment for high school students has become an increasingly popular strategy for community colleges, with research from the North Carolina Career and College Promise initiative finding that participation increased college enrollment by 9%. Many leaders are becoming more cognizant of the need to demonstrate the ROI of college for students and embracing new strategies to help them immediately package skills through modular learning, competency-based education, and stackable credentials. These strategies, along with the ability to create a sense of belonging and tangible results for increasingly diverse students, will likely differentiate schools that can stabilize and grow from those that may decline further.

Socioeconomic Impacts

Although the most dire predictions for higher education as a sector have failed to materialize so far, enrollment decline may still have significant implications for not only institutions, but for students and society overall. For potential students, choosing to forgo college may result in long-term consequences such as lower earnings: a Georgetown University report found that bachelor's degree holders would earn a million more than high school only graduates in lifetime earnings. Workers with a college degree are also less likely to be unemployed, more likely to be civically engaged, and more likely to live longer and enjoy better health.

Importantly, many of these factors are also persistently correlated with race, ethnicity, and gender, which suggests that earning a college degree is not a panacea for all social ills. For example, Black women as a group evidence a high rate of degree accomplishment, but face a work system that imposes a significant lack of earnings parity across many professions post-graduation. Nonetheless, a college degree still appears to be associated with significant benefits for students who have the support to complete one, an important consideration as more students look to alternative pathways or forgo any postsecondary education. As the population diversifies, it's also essential for all racial groups to receive the support needed to achieve career and earnings parity. The racial wealth gap remains a major concern in the United States, and expanding access to higher education in a systematic way will be a key component in mitigating inequities.

Lower college enrollment will likely impact economies on a local, national, and even global scale as well. In terms of financial impact, tax-collecting bodies receive about 45% less in taxes from high school only graduates vs college graduates, and those without a college degree are more likely to experience poverty and use government financial benefits such as food stamps. College graduates also contribute more than double the amount of spending toward local economies. Fewer college graduates will also impact the innovation workforce of the future: while education alone may not create innovators in and of itself, it does provide vital knowledge and network connections that allow innovators to keep up with the leading edge of technology.

Universities and colleges serve as critical employers in many communities. In 2023, there were nearly 3 million (2,901,584) people employed by colleges and universities in the U.S., and flagship universities are the largest or second employers in some states. In both urban and rural settings, many higher education institutions act as anchor institution in their respective "college town" or neighborhood. In this role, they greatly impact the development of their communities by influencing local social, financial, and human capital. The loss or decline of an anchor institution can damage the wellbeing of its community. If faltering institutions cannot recuperate, local economies will likely suffer. Further, their decline may continue to erode confidence in higher education.

ENROLLMENT PRESSURES: SEGMENTATION AND DISPARITIES IN PUBLIC EDUCATION

While the vast majority of colleges and universities are facing enrollment pressures, one group seems to be exempt: highly selective schools, including not only private sector universities but prestigious public institutions. Many private elite institutions are tightening their admission standards and accepting fewer students, both in number and percentage. This reduction appears to be putting pressure on some leading flagship public institutions, who attempt to leverage prestige and recruit funding while also trying to honor their stated missions to serve local students and advance the public good. Some of these schools now have acceptance rates between 10-20%, compared to the average collegiate admission rate at 70%. This tightening of admissions could displace students with fewer resources, and critics allege that flagship universities are failing to serve the students they were built to educate. Once considered the highest-quality affordable options, public flagship schools are now considered to be unaffordable by more than half of students. The segmentation happening in public schools effectively illustrates how disparate experiences with enrollment declines are interwoven with other challenges in higher education, including elitism and affordability.

PART 3: MOVING FORWARD

Strategies and Resources

As university and college leaders look to the future, some institutions appear to be more proactive than others in preparing for potential enrollment changes. One positive trend is a focus on improving retention, which averaged only 59% for open admission public schools in 2019-2020. A key aspect of improving retention may include strategies to ensure student belonging; a study published in the *Journal of Further and Higher Education* found that students' sense of belonging is vital for retention. Other strategies include increasing academic support and outreach to incoming freshmen, forming collaboratives with other institutions to share programs and classes, recruiting adult learners with some college but no degree, and incorporating innovative types of classes into the curriculum.

Overall, successful strategies for improving enrollment and retention appear to be related to reducing barriers for students and improving the perceived and actual overall value proposition. Below are recent examples of some schools' successful initiatives to increase enrollment.

- **Facilitating student technology needs -** Northeast Mississippi Community College (NEMCC) adapted to the pandemic and grew its enrollment while other community colleges experienced declines. NEMCC was one of three community colleges in the state of Mississippi that saw increased enrollment in the Fall 2021 semester. College leadership attribute the 1.3% enrollment increase to their Technology Initiative, which gave students iPads to facilitate a complete and smooth transition to online classes.

- **Addressing student basic needs and providing flexibility:** Fayetteville State University has reported implementing a new and effective strategy to increase enrollment, drawing in the largest freshman class since 2009 in the Fall of 2022. Their multifaceted strategy includes: providing wraparound services to support students' unique needs in a holistic way; offering asynchronous scheduling options with

  extensive class offerings; establishing an on-campus childcare center; and supporting food-insecure students through their food pantry.

- **Providing targeted support for male success:** Schools across the country have created male success initiatives to increase sustained enrollment and completion for men. Using mentoring, workshops, and other activities, they often specifically engage Black, Pacific Islander, and Native men, as well as men from rural backgrounds. Institutions with Male Success Initiatives or similar programs include the Community College of Baltimore County, California State system, the University of Utah, and many more.

In addition to strategies directly employed by colleges and universities themselves, researchers and service providers from the larger higher education ecosystem are stepping into the fray to provide support through tools and initiatives. Some are data collection or visualization initiatives meant to better understand the characteristics of students and their needs with persistence (attending multiple institutions), not just retention (staying at the same school). Others establish pathways or support structures to assist students throughout their education.

- **Standardizing data definitions to support under-resourced institutions:** Minority-Serving Institutions are a diverse group of schools with varying missions, funding sources, and communities that often serve historically marginalized students and accomplish much with limited resources. However, the inconsistencies in how they are classified leads to challenges with funding and improved outcomes for students. The MSI Data Project provides a robust and comprehensive database of these schools to overcome those discrepancies. Using this database, researchers and policy makers can better identify equity gaps and implement solutions to address them, leading to greater retention, persistence, and possibly increased enrollment.

- **Modernizing the sector's understanding of what today's students need:** Generation Hope is a nonprofit that partners with student parents to help overcome barriers to attaining a degree. Their direct programming provides tuition assistance and mentorship to student parents in the DC metro and New Orleans areas, while also offering Pre-K support for students' children. They also engage in policy advocacy to help colleges and universities better understand how to invest in and support student parents, who make up more than 20% of college students today and include an outsized share of students of color.

- **Tightening the gap between education and employment:** Research continues to show that increasing job opportunities and earning potential remains a top reason why students enroll in college, while a top deterrent is concern about return on investment. One new collaboration, Launch: Equitable and Accelerated Pathways for All, aims to refine and scale college and career pipelines at a community level by ensuring opportunities for work-based learning and in-demand credentials. The initiative includes finding ways to scale and improve existing programs and identifying systemic obstacles blocking pathways. Both sides provide educational and career training to community members where they conduct working research.

Each of these efforts rests on understanding historical and predictive data on students and potential students. The MAPS Project uses data and student perspectives to equip leaders to better serve students of the future. The newest MAPS tool, the **Student Trends and Enrollment Projections (STEP) dashboard**, displays population and enrollment trends, student migration patterns, and online enrollment preferences on a state-by-state basis and by student/population race and gender. This tool allows users to understand who the typical students in their catchment areas have been, how their enrollment is diverging from the overall number of potential students in their area, and predictions on how those trends may change in the future. Using this data resource, higher education leaders can shape their recruitment strategies to contend with the changing times and better understand segments of students they may want to better attract and serve

CONCLUSION:

Higher education is facing a key inflection point, not only in terms of enrollment trends, but in reviving to fulfill the overall promise of equitable student success. It's likely the sector's future holds two paths: one in which inequity continues to widen as the viability of colleges and universities that serve the greatest number of students is threatened, even as the most well-resourced and highly selective institutions are sustained. And another, in which policymakers, institutional leaders, and sector builders work together with students to ensure appropriate institutional resources and equitable student success. Enrollment trends and student outcomes are not separate domains.

As colleges and universities work to shore up their enrollment strategies, they will be wise to invest in not only recruiting what is an increasingly diverse student population, but in ensuring that they can retain, graduate, and positively impact those students post-graduation. As leaders adapt to best serve these students, they will need data-driven insights to effectively allocate resources and make strategic decisions.

The MAPS Project suite of data tools supports higher education leaders in making informed decisions based on cutting-edge data projections and a focus on equitable student success. These three tools allow leaders to:

- Assess demographic trends and enrollment projections across the United States through the Student Trends and Enrollment Projections dashboard.
- Understand how their institution is already serving different student groups with an equity lens through the Institutional Equity Outcomes dashboard.
- Illuminate the financial health of their school with a unique emphasis on student-centricity through the Financial Health dashboard.

No institution is likely to succeed in tackling the challenge of declining enrollment, and the financial challenges this may bring, without also challenging the inequity that prospective students experience. Colleges and universities that can best use data to drive strategic decision-making and position themselves to not only attract, but authentically support, the diverse students of tomorrow will be the ones most likely to thrive in the future.

ACKNOWLEDGMENTS:

The MAPS Project, a Sorenson Impact Center initiative, is supported by the Bill & Melinda Gates Foundation. This report was prepared by the MAPS team, including Timothy Schoof, Thea Louise Thomaseth Bugge, and Megan Brewster, with design by Kathryn Colton and Madelyn Foulger.

ABOUT THE MAPS PROJECT

The MAPS Project, a student-centric initiative that works to bring high-quality data insights and historically marginalized voices to higher education leaders, provides data tools and resources to help inform decision making. The MAPS Project is focused on Modeling, Analyzing, Prototyping, and Sharing student-equity-centric ideas in higher education. We believe that more equitable and student-centric futures in higher ed will be achieved through the concert of data science, student perspectives, and cross-sector collaboration. Through our efforts, we convene experts, fund research, and build models to demonstrate new ways of integrating student-equity-centric perspectives and foresight practices across higher education.

ABOUT THE SORENSON IMPACT CENTER

The Sorenson Impact Center helps organizations achieve their impact vision by connecting capital to social and environmental solutions; helping organizations measure, report, and improve impact; and integrating data science and people-centered storytelling into all that we do. Along with our clients and partners, we share a vision of an equitable and thriving world where everyone is valued, communities prosper, and the measured impact of our actions guides decision-making. As part of our mission to train future impact leaders, the Center integrates academic programming and experiential learning into each of its practice areas. The Center is proudly housed at the University of Utah David Eccles School of Business. Learn more at http://www.sorensonimpactcenter.com