

Mapping the Enrollment Landscape

A convergence of crises over the past three years has greatly altered the college enrollment landscape, revealing strengths and vulnerabilities that previously went unnoticed, were underestimated, or were misunderstood. Use this infographic to reorient yourself to a higher education marketplace that is being transformed by ever-disruptive forces.

DECREASING DEMAND FOR HIGHER EDUCATION

- The primary cause of declining college-going rates among students who choose to attend community college seems to stem from “nonconsumption”—a reduced rate of college-going among high school graduates.
- Due in part to the tight labor market of the present, many employers are structurally reducing their educational requirements.
- Students are increasingly turning to college alternatives, from high-growth, high-tech industries to more traditional apprenticeships.

10%

reduction in US high school grads choosing to attend college

(2016–2020), *The Hechinger Report*

CHANGES IN MARKET SHARE

- To grow market share, it is imperative to pinpoint underlying developments that could identify emerging markets and reveal populations that could reflect sharper declines in the future.
- Increasingly, schools from different segments are reaching further onto each other’s turf to make up for shrinking prospect pools in their own.
- Schools that win more than their fair share of enrollment will increasingly be those who can effectively explain to the market what makes them different and special.

63%

of enrollment changes from 2008 to 2018 occurred due to changes in market share

EAB, IPEDS

A NEW KIND OF STUDENT

- Students of the pandemic era are academically underprepared, less persistent, more dependent on adults, under-socialized, and disengaged—all reflections of their changing context and the limitations of our current approach to serving them.
- These students are far less interested in pursuing four-year degrees and more interested in forging their own career paths.
- “Gen P” is eager to engage but not finding what they want or need from higher education.

62%

of 18–24-year-olds say they want to “forge their own educational path”

*“Question the Quo,”
ECMC Group*

ADMISSIONS OFFICE CHALLENGES

- The nationwide crisis that emerged during the “great resignation” has not gone away; if anything, it is getting worse. Staff members today are doing more work per person than those in years past, and their shrinking numbers compound the issue.
- Wild cards: FAFSA changes on the horizon + uncertain implications of the affirmative action SCOTUS decision.

46%

increase in staff “likely” or “very likely” to look for new employment in the coming year

CUPA-HR, 2022–2023

A HOSTILE CULTURAL CONTEXT

- The prevalence of negative opinions toward higher education is rapidly growing. Also new is the strong ideological slant to college skepticism.
- Various factors, including the high cost of college, have led students to focus on fields of study they believe are most likely to boost their employability and earnings.
- Students across the political spectrum are almost equally likely to avoid states they perceive as embodying political values they don’t agree with.

>60%

of 18–34-year-olds agree that “a four-year college education is not worth the cost because people often graduate without specific job skills and with a large amount of debt to pay off”

WSJ/NORC