

2023 HIGHER EDUCATION MARKETING OUTLOOK

Navigating the Enrollment Cliff

ADVANCE EDUCATION WHITEPAPER

Abstract

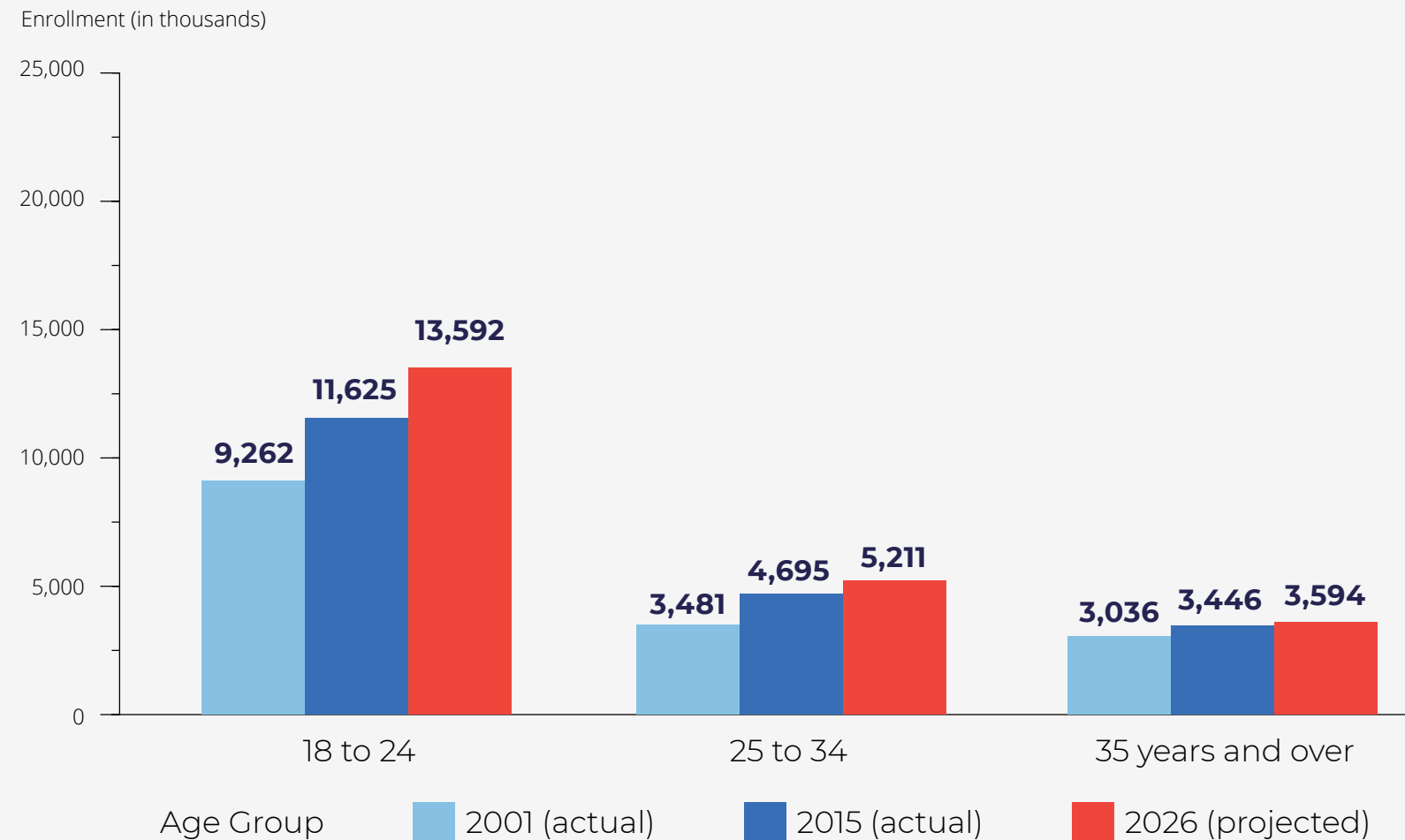
Almost all colleges have seen decreased enrollment over the past decade. Predictions for an even steeper enrollment cliff in 2026 have higher education professionals worried. With reduced populations of high school graduates in the pipeline for college, there are challenges ahead for higher education. But there are ways to help soften the impact on your institution. Navigating this drop will require strategy and introspection to find the students who will thrive in your institution. In this paper, we will explore the enrollment trends, predictions for 2023 and beyond, and strategies to help support healthy enrollment yields for the coming years.

FACTORS AFFECTING ENROLLMENT

U.S. birthrate fluctuations affect enrollment, but many other factors play a part.¹ The coming enrollment cliff is brought about primarily by the drop in births around the 2008 financial crisis, with those babies hitting traditional college age around 2025 and 2026. But economic, political, legal, and societal changes all affect who enrolls in college.

Let's look at some historical trends and consider the factors that will impact enrollment in the upcoming few years.

Actual and projected numbers for total enrollment in all degree-granting postsecondary institutions, by age group: Fall 2001, Fall 2015, and Fall 2016



Postsecondary enrollment projected increase between 2015 - 2026

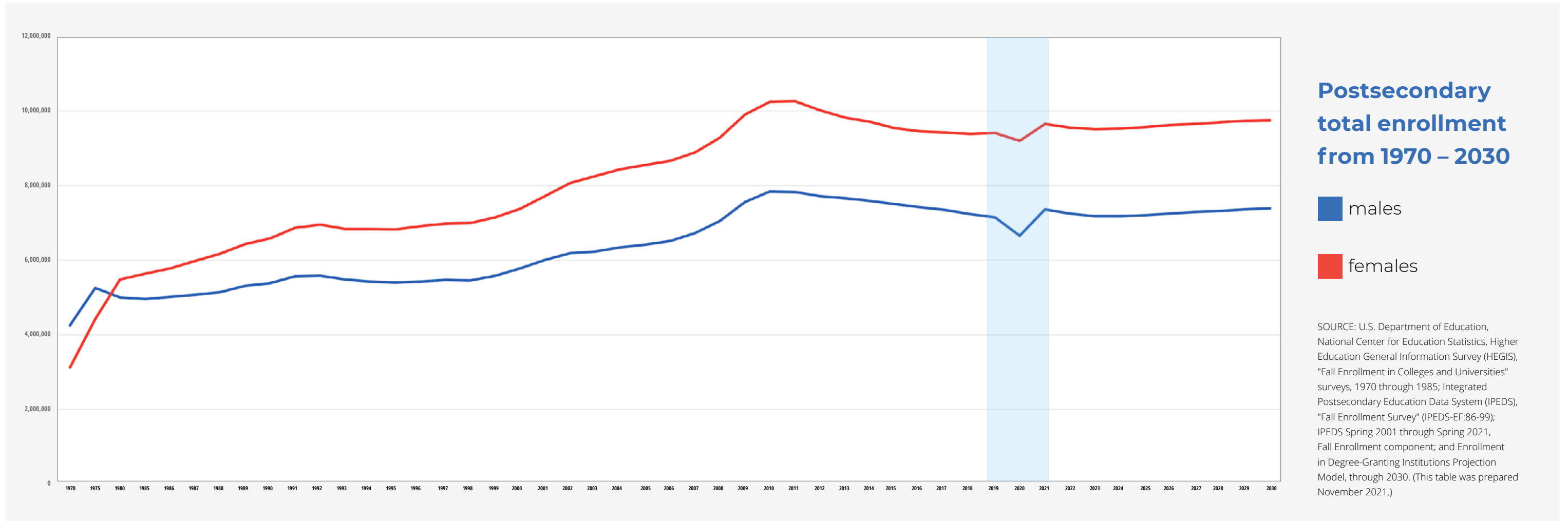
Ages 18 - 24 years
17%

Ages 25 - 34 years
11%

Ages 35 +
4%

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS) Spring 2002 and Spring 2016, Fall Enrollment component; Enrollment in Degree-Granting Institutions Projection Model, 2000 through 2026; and U.S. Department of Commerce, Census Bureau, Current Population Reports, "Social and Economic Characteristics of Students," various years. (This figure was prepared April 2017.)

Historic Higher Ed Enrollment Trends



When the U. S. began collecting higher education enrollment statistics in 1869-70, just one percent of the 18–24-year-old population was enrolled in higher education.² About 21 percent of those students were female, and colleges were small, with an average size of just 112 students. By 1900, population growth meant the number of higher ed students grew significantly. Still, it only rose to two percent of the population, while the gender split shifted, with 33 percent of students being women.

Between 1901 – 1930, enrollment continued to increase, with nine percent of 18-24-year-olds enrolled, and the proportion of female students had increased to 40 percent. Male enrollment dropped during the 1940s due to young men going to fight in WWII. By 1949, 15 percent of the college-aged population was enrolled, but women had fallen to 30 percent of that number. The 1950s and 1960s saw a big jump in enrollment to 35 percent of 18-24-year-olds. Enrollment growth slowed in the 1970s and 1980s, and part-time students

rose from 31 percent in 1969 to 41 percent in 1979.

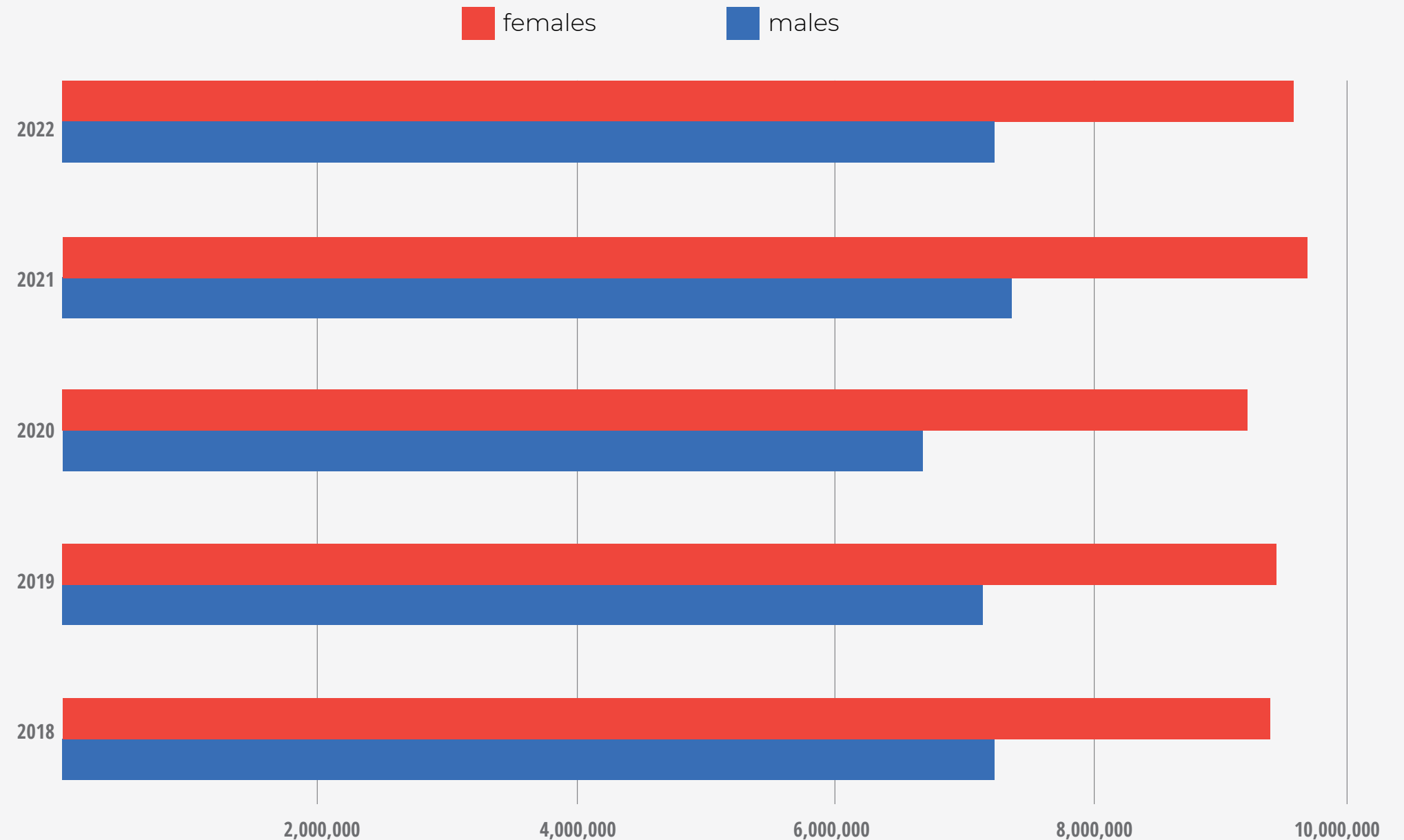
College enrollment mostly rose during the 1990s, despite a drop in the college-age population during the 1980s and early 1990s. High rates of older women enrolling in college, and a larger percentage of high school graduates enrolling kept the trend going up.³ Undergraduate enrollment increased by 37 percent between 2000 and 2010, but then decreased by 8 percent between 2010 and 2018.

Enrollment During Covid and Onward

Enrollment rates dropped approximately one percent each year after 2012. Then, colleges saw a precipitous drop during the pandemic, with an overall decline in undergraduate enrollment of slightly above six or nearly seven percent between fall 2019 and fall 2021.⁵ Rates have stabilized again, with enrollment downturns returning to rates similar to pre-pandemic decreases.⁶ The proportion of men enrolled in college stands at about 40 percent, with the pandemic causing steeper drops in male enrollment.⁷ Male students are also less likely to graduate.

Highly selective institutions have seen minimal enrollment gains throughout the pandemic, from the fall of 2020 compared to previous year, but every other category of higher education institution has seen declines from fall 2020 to fall 2022. During this period, enrollment in associate degree programs dropped eight percent, and bachelor's degree programs dropped three percent. At the same time, enrollment in undergraduate and graduate certificates, master's programs, and doctoral programs all saw gains.

Enrollment rates 2018 - 2022



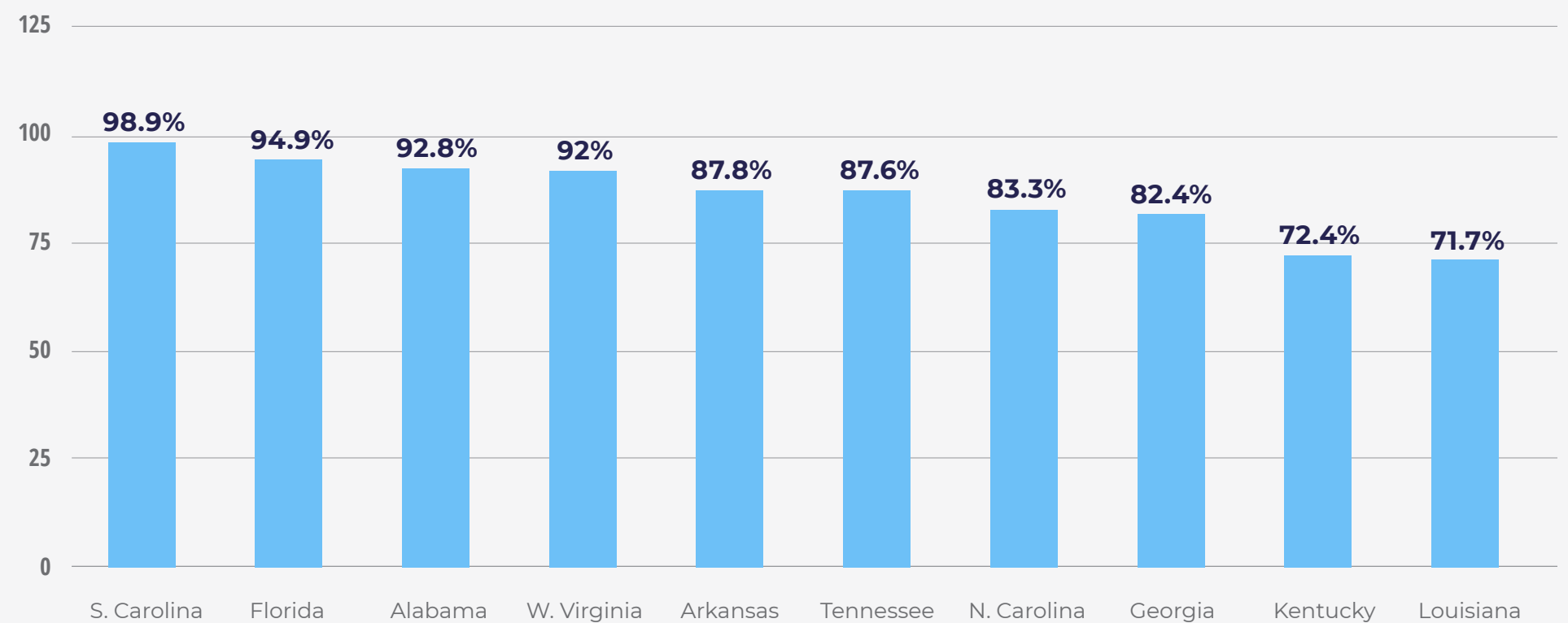
Enrollment Outlook for the Southeastern United States

The population has grown in the southeast faster than in the United States as a whole.⁹ This could be good news for colleges in the region, although no one will entirely escape the impacts of declining overall enrollments.

The most recent figures are encouraging, with increases in enrollment in many states. West Virginia, Virginia, Mississippi, and Kentucky all saw some enrollment increases, but it was uneven. For all southeastern states, enrollment rates in two-year institutions dropped, while most saw rising enrollment in graduate programs, most notably in Mississippi, which saw an almost 19 percent increase. The rates for private vs. public 4-year institutions were mixed, with some rising and some falling.¹⁰

The differences from among states and between types of institutions and programs highlight the variable nature of this enrollment drop for the southeastern region. All institutions will have challenges, and the path forward may include a varying mixture of program types and student profiles to keep schools afloat. Studying the patterns in your state, region, and among your students can yield surprising insights that can help you to formulate effective strategies to find and nurture the most appropriate students for your institution.

Enrollment Coverage in the Southeast of a 4-Year Degree in a Public Institution - 2021



The Challenges for Enrollment Professionals

Enrollment professionals are facing stiff headwinds from many directions. Yet understanding the challenges can help colleges to prepare for a different but still strong future. Here are some of the biggest challenges ahead:



Lower numbers of traditional college-age students in the coming years



Drops in male enrollment and graduation rate



Societal perceptions that higher education may not be worth the cost



Increasing numbers of non-traditional students requiring different outreach and support



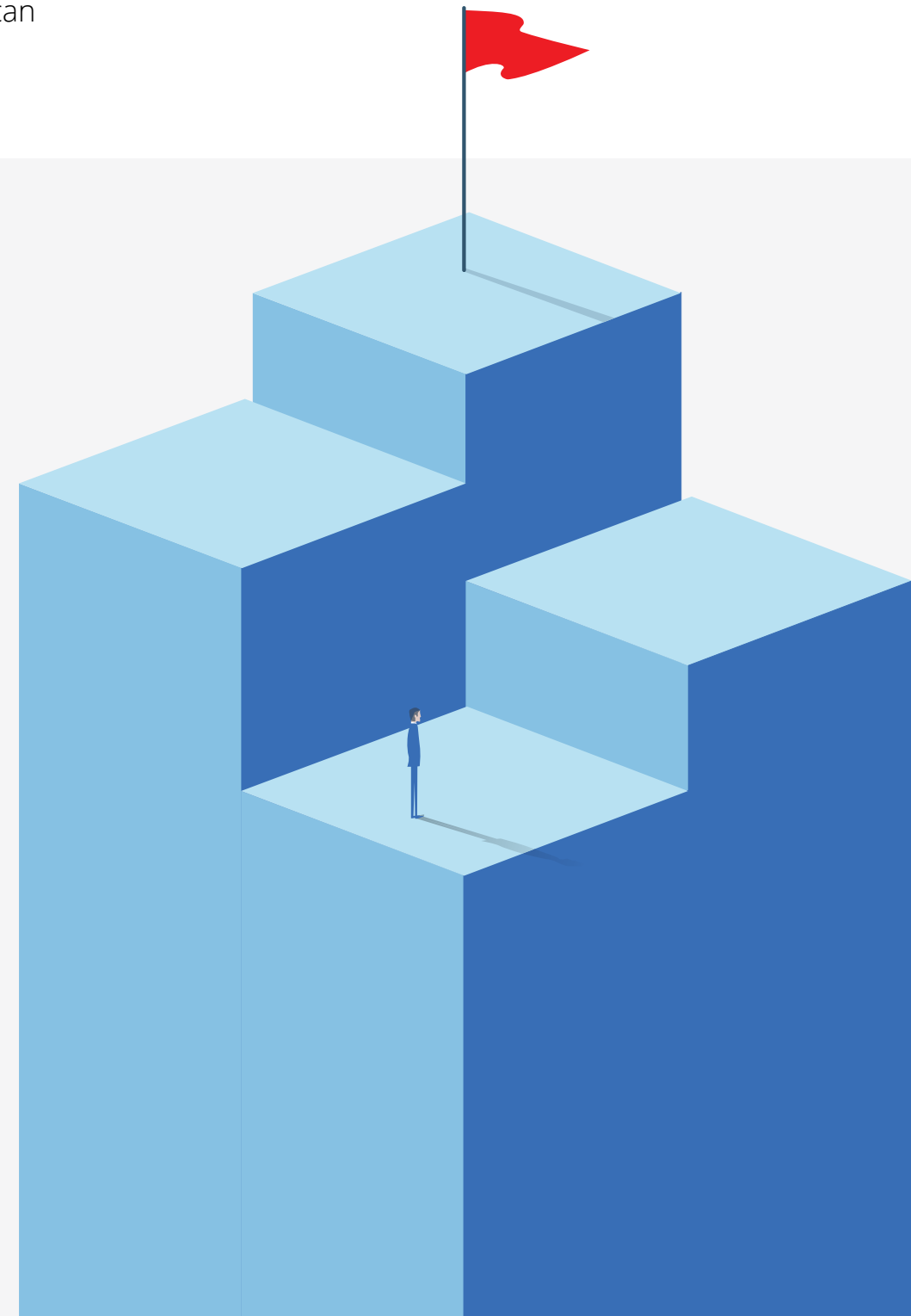
Shifting student demographics, including changes in international student patterns and racial/ethnic demographics in the U.S.



Financial pressures on students, education institutions, and the U.S. economy



Fast-changing skills demands from employers as technological advances transform workplaces



Strategies for Success Despite the Enrollment Cliff

There are many ways to approach enrollment challenges to shepherd your school through the coming shifts.

You will need to use multiple strategies to find the right students for your school.

Here are some actions you can take to develop a specific strategy to meet your needs:

Identify and follow through with the best candidates for your school

Your institution has unique features and programs that will make certain students the best candidates for enrollment and success. The first step is figuring out who they are and finding them. Then, you have to devote the time to nurturing connections to enroll the students who best match your institution.

Consider dual enrollment programs

Working with high schools to start students on their college journey while they are still finishing high school can help you lay a pathway for these students to enroll full-time when they have graduated.

Spend time on certification programs and job training

Certificate programs are some of the bright spots in enrollment numbers this year, so consider how you can leverage interest in certificates to bring in more students who may wish to incorporate their work at your school into a degree program later. Partner with companies for job skills training and focus on shorter programs to help fulfill local and national workforce needs.

Study the data for new prospects

Data analysis can help you explore demographic trends within your region and for your student body, giving insights into student populations you may have missed in the past. Consider alternate marketing strategies to reach new prospects.

Personalize for your target prospects early

Once you have found the prospects who can succeed in your programs, spend more energy leading them through the process of considering and choosing colleges. Start earlier in their high school journey and identify the unique individuals who can benefit from what your school offers.

Market graduate and adult education programs

Graduate programs are another bright spot in the enrollment numbers this year, so consider how you can fill your rosters in existing degree programs. Also, a growing number of higher education students are adults, so consider how to reach and enroll more degree-completion and adult students.

Conclusion

A well-rounded marketing plan will help diversify your enrollment and uncover the prospective students who best match your institution. Your marketing must employ varied strategies to reach different types of prospects in their enrollment journey. There's a unique solution for your marketing based on your goals, curriculum, and resources and we're here to work with you to figure it out. Building a complex marketing strategy isn't easy but we're here to help. Our strategists work with clients like you every day to deliver results. [Contact us today](#) to get us started on your personalized marketing plan. 🎓

REFERENCES

1. Dorn, Emma, et al., "Higher education enrollment: Inevitable decline or online opportunity?", McKinsey & Company, November 2020
2. U.S. Dept. of Education, "120 Years of American Education: A Statistical Portrait," Center for Education Statistics, January 1993
3. U.S. Dept. of Education, "Digest of Educational Statistics 1999," Center for Education Statistics, March 2000
4. U.S. Dept. of Education, "The Condition of Education 2020: Undergraduate Enrollment," Center for Education Statistics, (N.D.)
5. Saul, Stephanie, "U.S. College Enrollment Dropped Again in the Fall of 2021, Despite the Arrival of Vaccines," The New York Times, January 13, 2022
6. Knox, Liam, "Despite Hopes for a Rebound, Enrollment Falls Again," Inside Higher Ed, October 20, 2022
7. Mangan, Katherine, "The Male Enrollment Crisis," Chronicle of Higher Education, 2022
8. National Student Clearinghouse Research Center, "First Look Fall 2022 Enrollment," October 20, 2022
9. Pacific Northwest Regional Economic Analysis Project, "Southeast vs. United States Comparative Trend Analysis: Population Growth and Change 1958-2021," 2022
10. Bouchrika, Imed, "College Enrollment Statistics: 2022 Data by State, Race, Gender, and Age," Research.com, October 4, 2022

KEY TAKEAWAYS

- **Studying the enrollment patterns** in your state, region, and among your students can yield surprising insights that can help you to formulate effective strategies to find and nurture the most appropriate students for your institution.
- **Understanding the challenges** enrollment professionals face can help colleges to prepare for a strong future.
- **Developing a personalized strategy** unique to your institution will set you up for success.



Let's grow your student enrollment, **together.**

We believe any effective marketing campaign begins with thoughtful and powerful storytelling. Our first goal as a marketing partner is to understand your story and what makes you special.

Once we understand who you are, we can build a strategic marketing plan to tell your story in the best way on the best platforms to reach your ideal audience. Compelling stories paired with a strategic plan drive great results, and we have a track record of doing just that.

Partnerships with traditional four-year universities, community colleges, and technical and career schools, we help institutions level up marketing strategies for student recruitment as well as alumni outreach.

Like what you see? Want to know more? [Let's talk.](#)

Thank You.



ADVANCE
EDUCATION