

Welcome to Today's WCET Webcast

JULY 13, 2023

The webcast will begin shortly.

There is no audio being broadcast at this time.

An archive of this webcast will be available on the WCET website next week.





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Webcast

Declining Enrollments: A Cliff or a Shift?

July 13, 2023



Welcome!

- Slides can be downloaded via the link in chat.
- Please use the **Question** box for questions and **Chat** for other information exchange.
- Follow the Twitter feed: #WCETWebcast.
- Slides, recording, and shared resources will be emailed to attendees.



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Speakers



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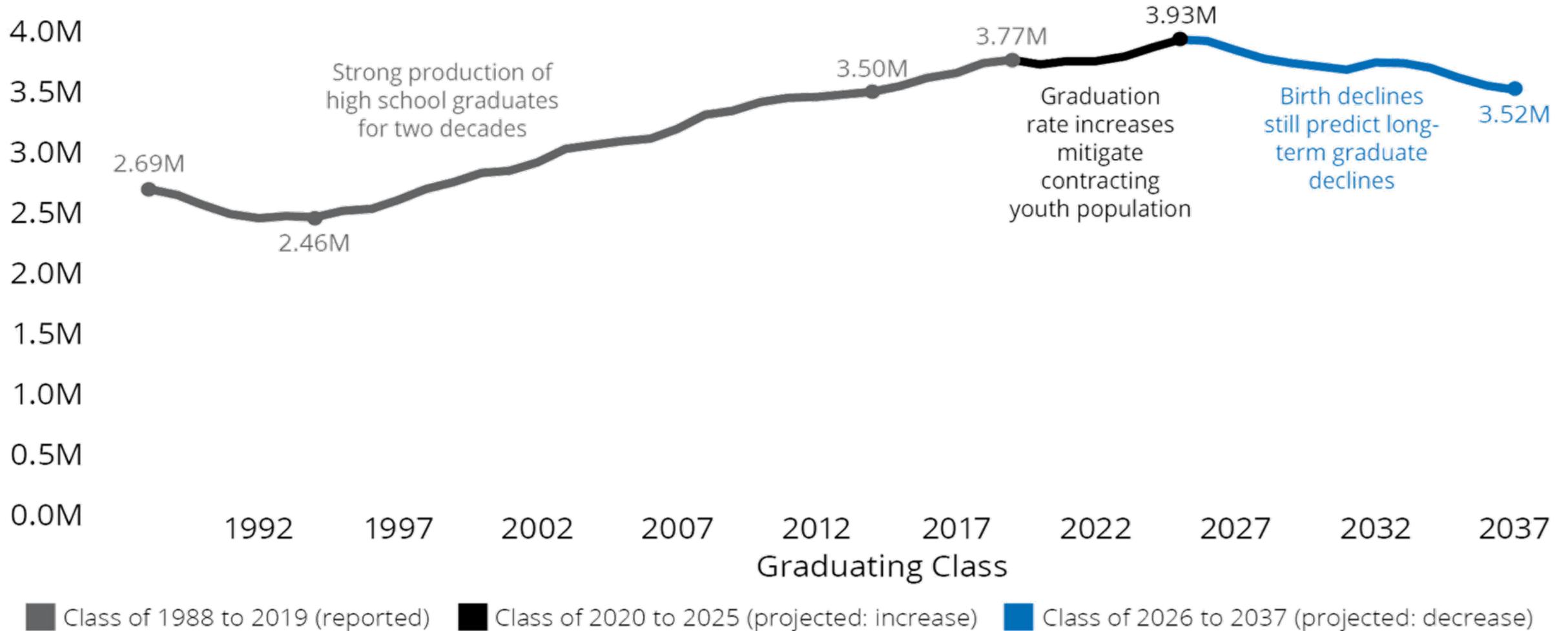


COLLEEN FALKENSTERN

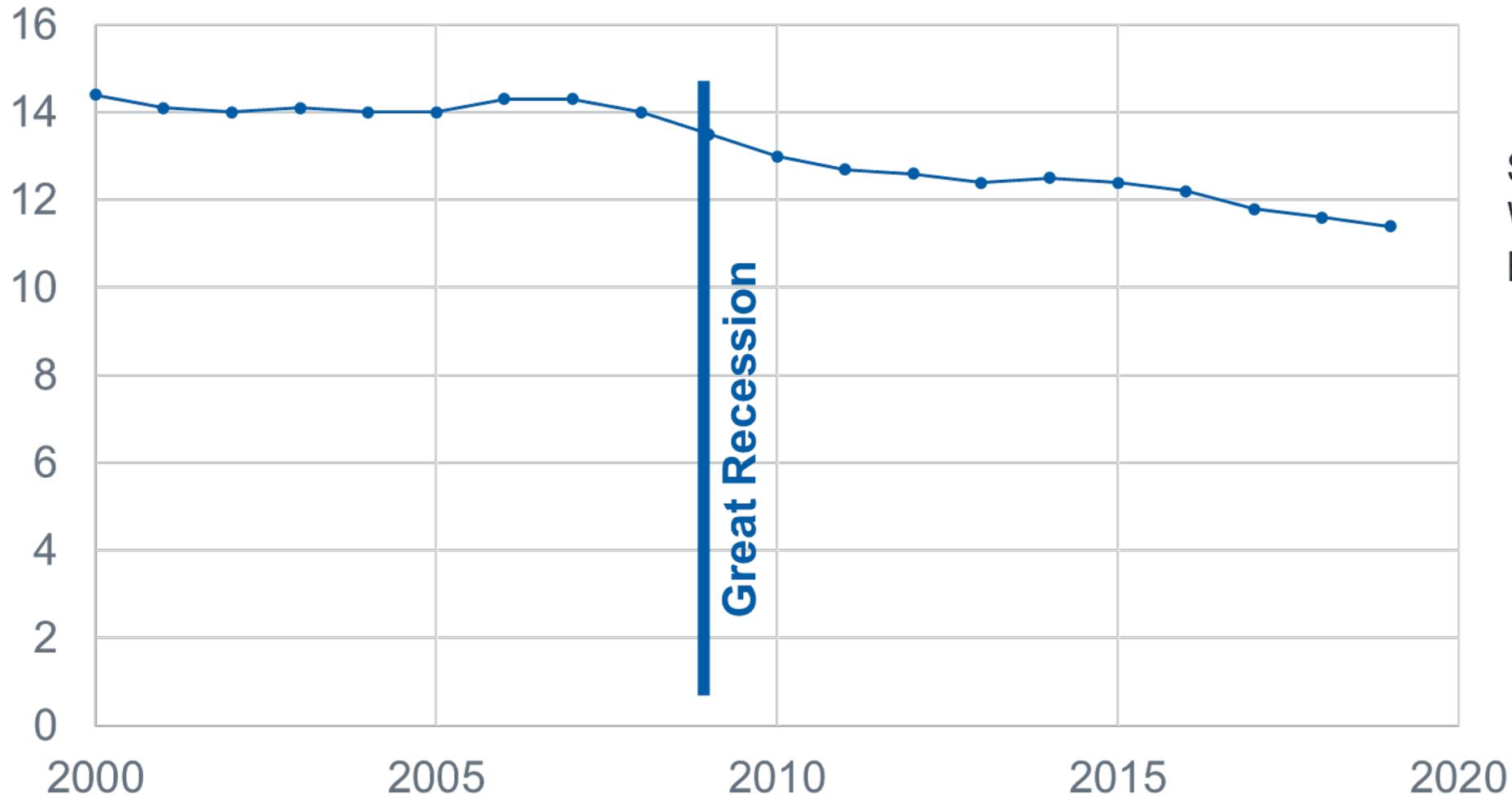
*SENIOR RESEARCH ANALYST
WICHE*



Slowing Number of U.S. High School Graduates, then Decline (U.S. Total High School Graduates)

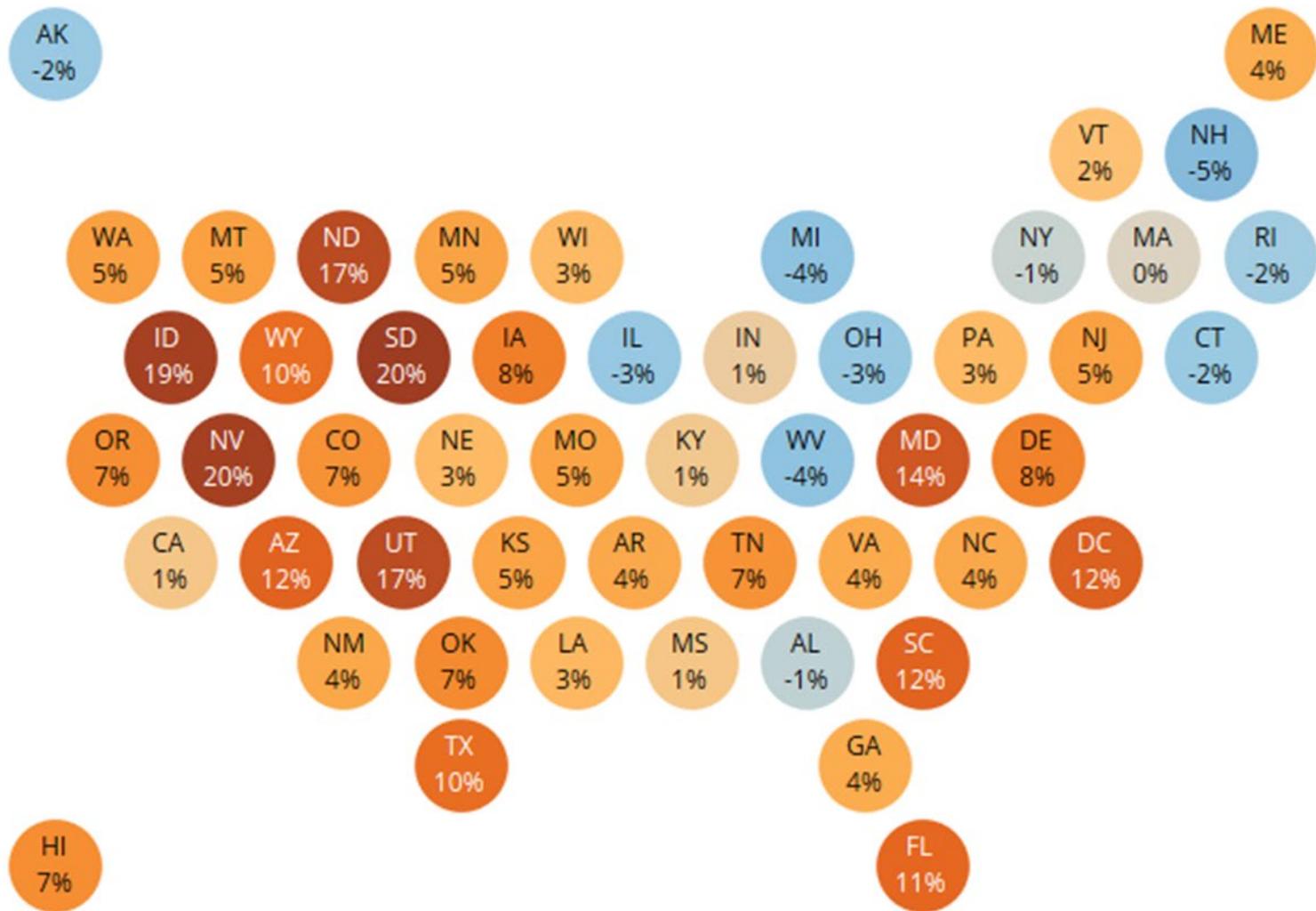


U.S. Births Per Thousand People

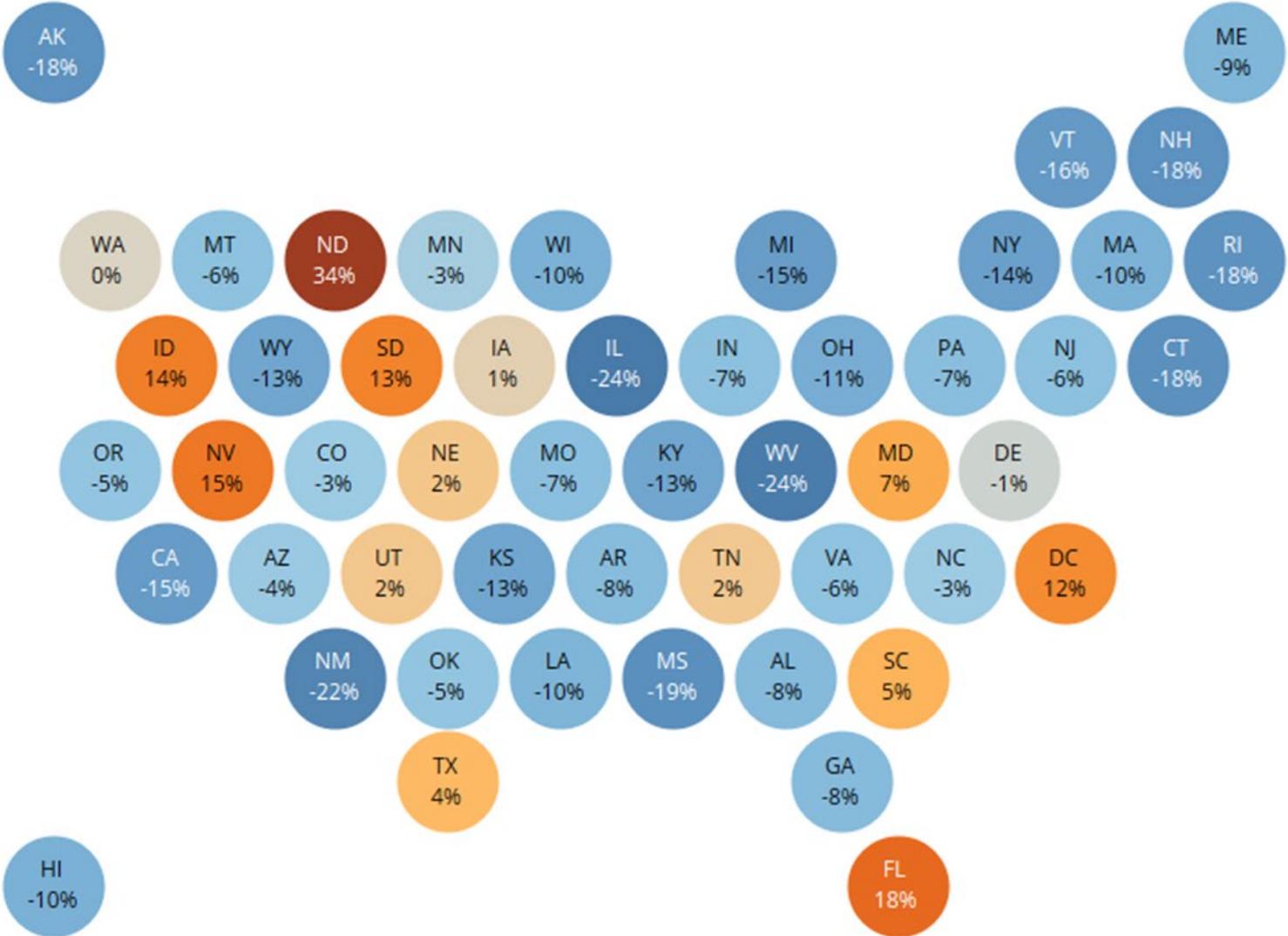


Source:
World Bank, via Federal Reserve
Bank of St. Louis

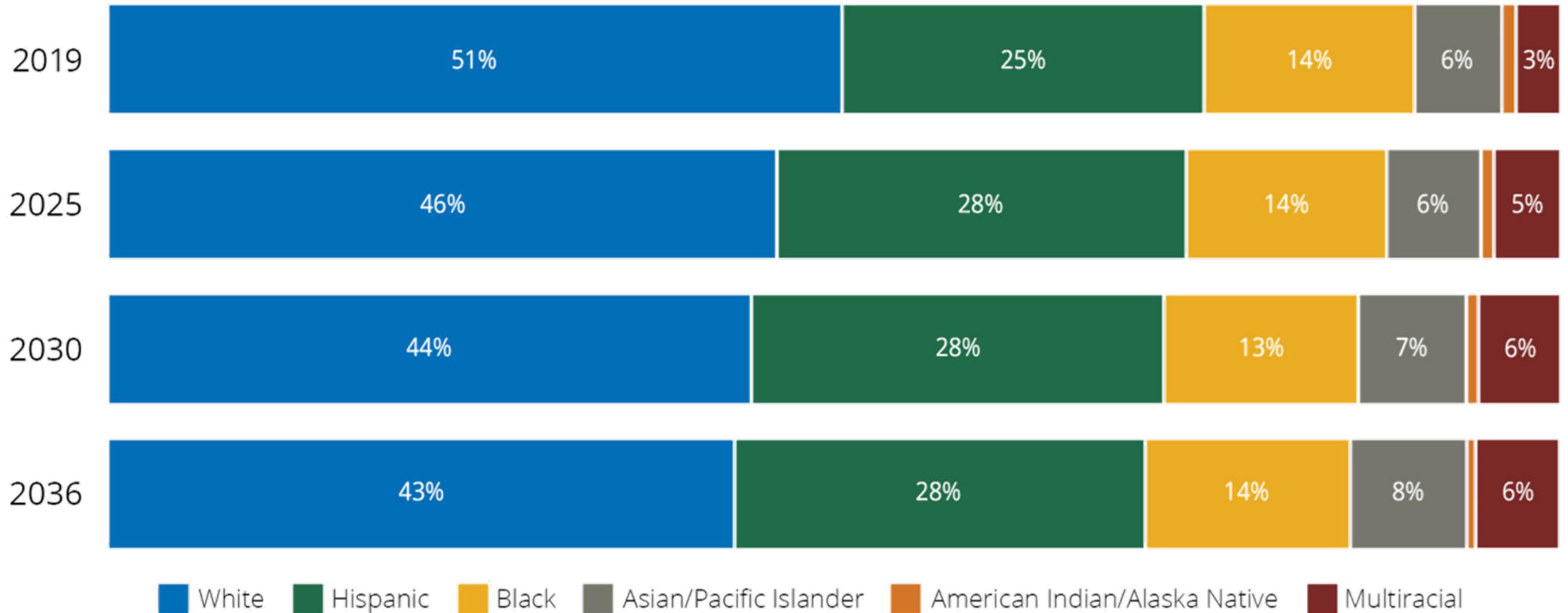
Projected Change in the Number of Public High School Graduates from Class of 2019 to Class of 2025



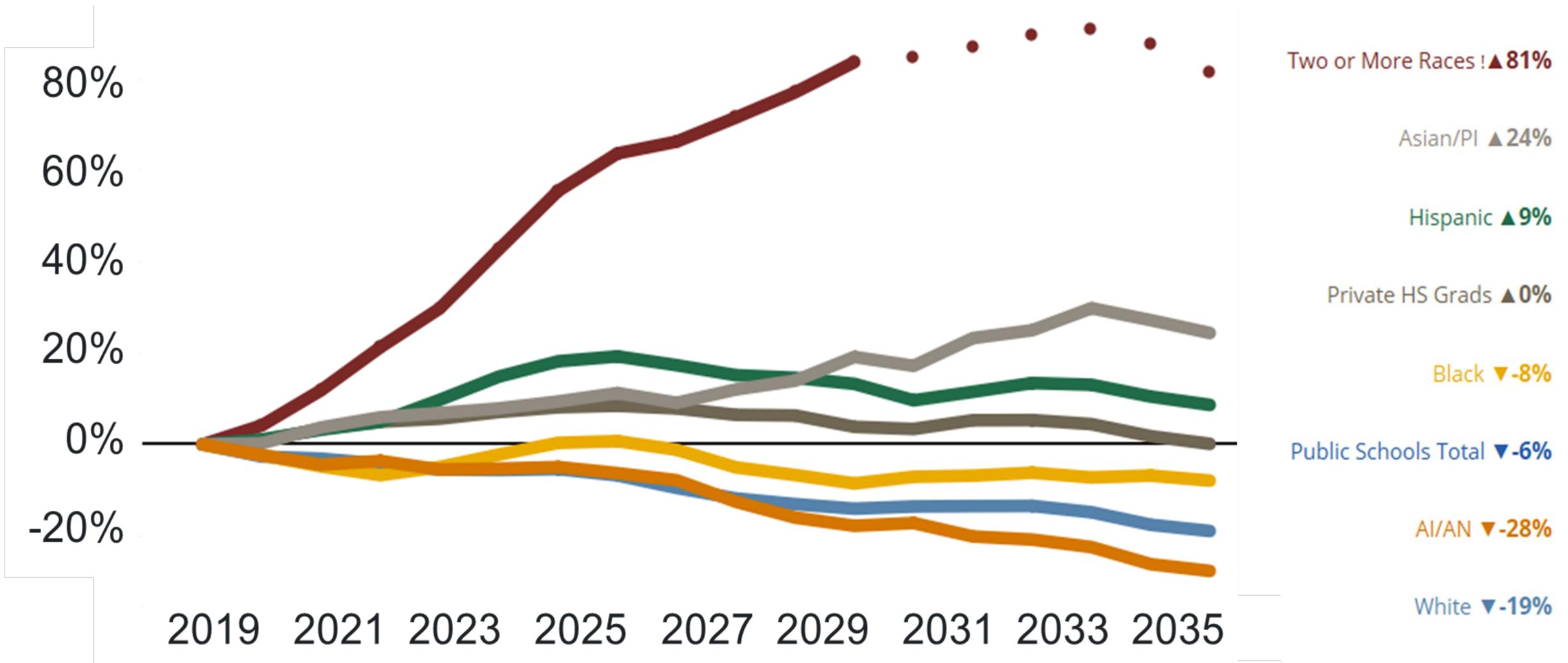
Projected Change in the Number of Public High School Graduates from Class of 2019 to Class of 2037



Diversification of Public High School Graduating Classes

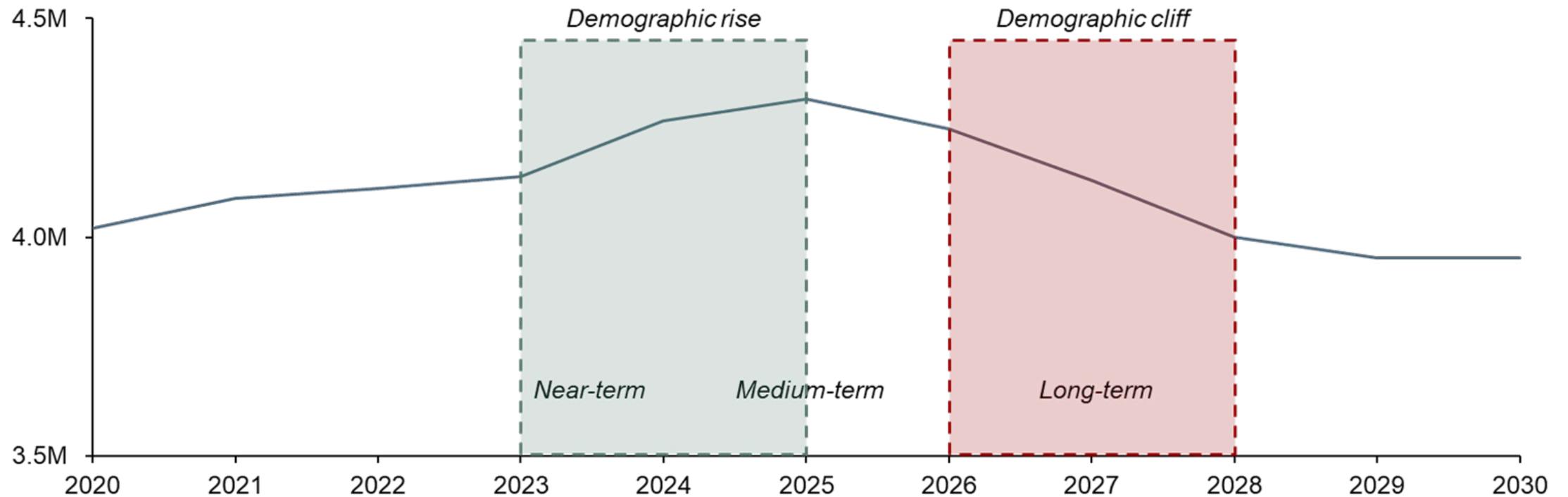


Projected Change in the Number of Public High School Graduates from Class of 2019



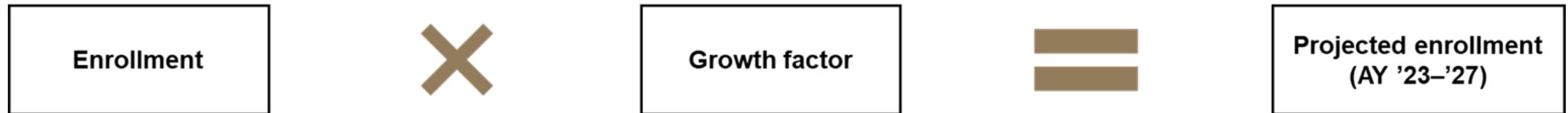
Demographic adjustments are expected to result in near- and medium-term enrollment increases, with 2025 as an inflection point before growth rates decrease

Number of 18-year-olds in the U.S. over time



Methodology for enrollment projection leverages historical data to forecast growth; weights are applied to variables based on projected impact and case probability

Enrollment growth methodology

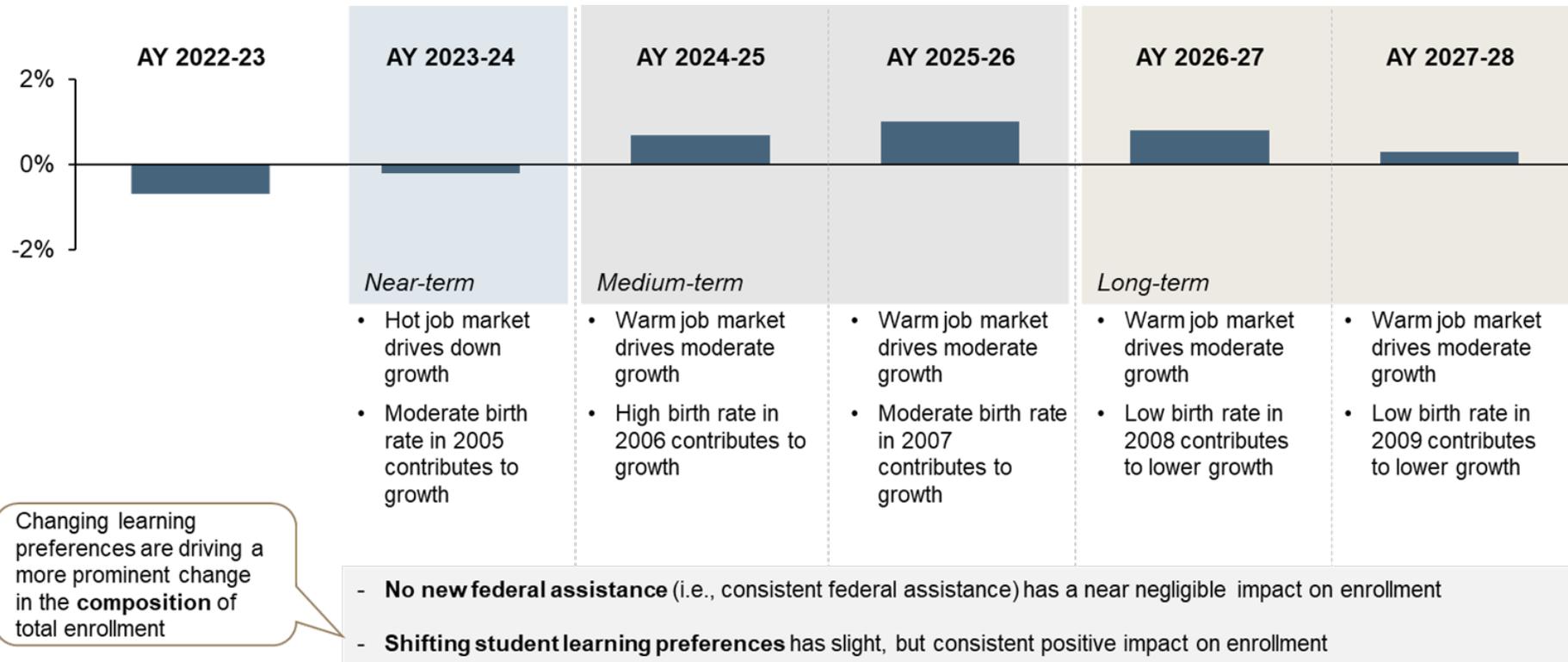


Variable	Enrollment impact		
	Near-term	Medium-term	Long-term
① Growth due to demographic adjustment	↑	↑	↘
② Growth due to job market	↓	↑	↑
③ Growth due to student learning preferences	→	→	→
④ Growth due to federal tuition assistance	→	→	→

International enrollment growth is projected separately, leveraging historical growth rates

Overall enrollment expected to remain largely flat over the next five years; cooling job market and demographic adjustment to have greatest impact

Overview of postsecondary enrollment forecast



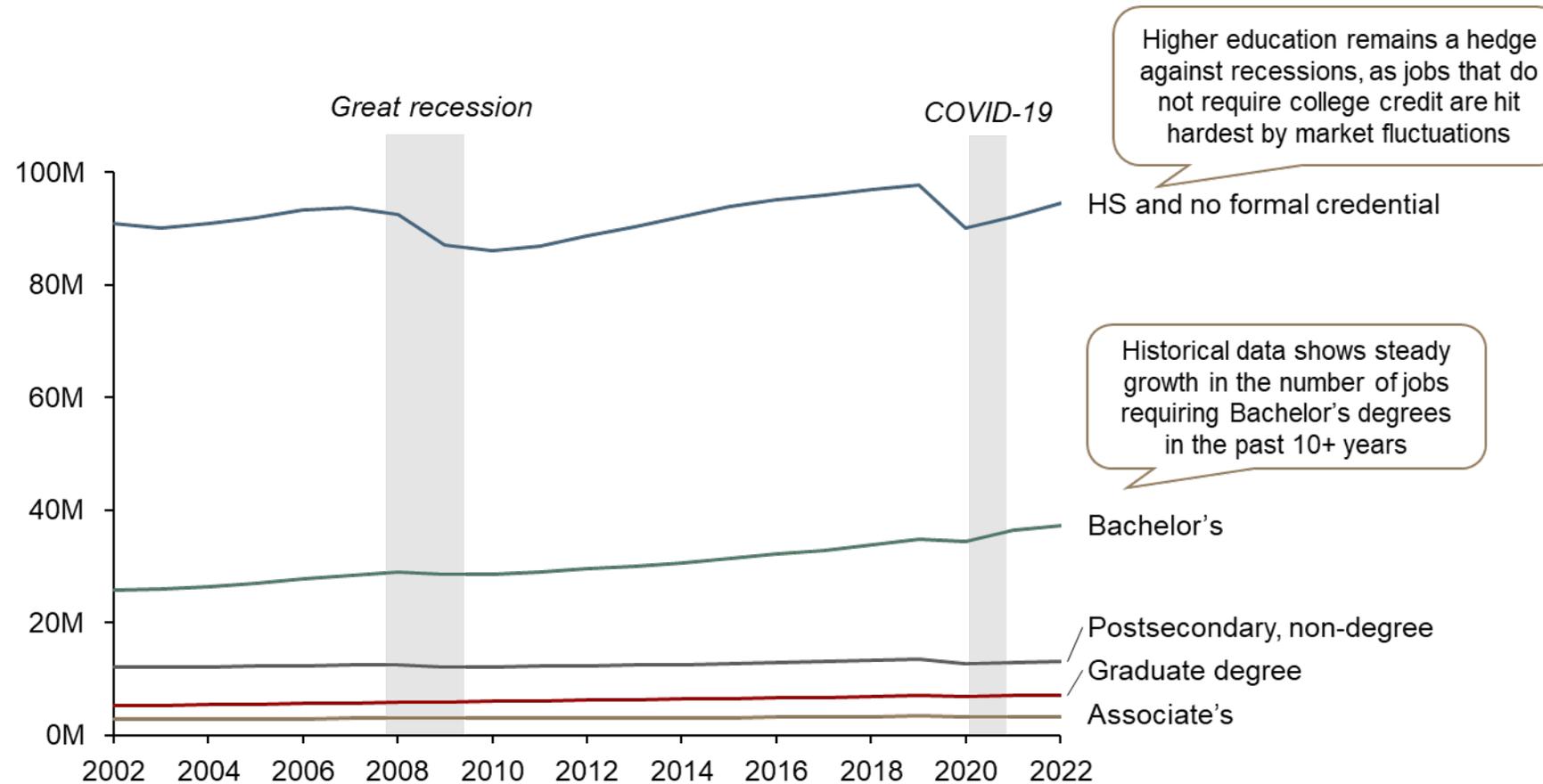
With demographics as a known variable, monitoring the job market will most inform changes to projections

Note: *Projected enrollment for AY '22-'23 reflects Fall 2022 enrollment based on the NSC Spring '23 report, whereas projection for the other academic years reflect fall enrollment in that academic year based on model projections

Sources: CDC, FRED, NCES, NSC, Tyton Partners interviews and analysis

Directionally, the signal power of a postsecondary degree to employers has held steady both over time and through recessionary events

Number of jobs available by degree requirement



Higher education remains a hedge against recessions, as jobs that do not require college credit are hit hardest by market fluctuations

HS and no formal credential

Historical data shows steady growth in the number of jobs requiring Bachelor's degrees in the past 10+ years

Bachelor's

Postsecondary, non-degree

Graduate degree

Associate's

Long-term improvements to the quality of alternative credentials may lead to fewer employers requiring postsecondary degrees.

However, data through AY '22-'23 indicate the market has not yet reached that tipping point.

Note: *All years on this slide refer to associated academic year (e.g., 2022 refers to AY '22-'23)
Sources: Lightcast, Tyton Partners analysis

Questions from the Audience



Webcast Resources

Publications

- [*Knocking at the College Door*](#)
- [*From Cliff to Escalator: Why the 5-year Higher Ed Enrollment Outlook is Less Dire Than Some May Suggest*](#)
- [*WCET Frontiers*](#) blog series – coming soon!

Learn more about our organizations:

- [Every Learner Everywhere](#) | [WCET](#) | [WICHE](#)
- [Tyton Partners](#)



Additional Information and Resources



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Webcast

The webcast recording and additional resources will be available in the next week: wcet.wiche.edu/events/webcasts.



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New Orleans, LA

WCET Annual Meeting
October 25-27

ASWE: Evolve
October 26-28



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