Bay View Analytics

Digital Learning Pulse Survey

Planning for a smaller future:

Dealing with Declining Enrollments

Dr. Jeff Seaman and Dr. Julia Seaman

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Planning for a Smaller Future:

Dealing with Declining Enrollments

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Acknowledgments

We'd like to thank the thousands of students, faculty, and academic administrators who took the time to respond to our questions and share their hopes and concerns. Many respondents also generously provided detailed explanations of their responses.

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PARTNERS

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Introduction

Higher education in the U.S. has undergone dramatic changes as a direct result of the COVID-19 pandemic. This study uses responses to the Digital Learning Pulse Survey (DLPS) to examine one aspect of those changes – how institutions deal with declining enrollments.

The DLPS project began in the spring of 2020, and has completed seven data collection rounds. Designed to document the impact of the global pandemic on U.S. higher education, the project has investigated the substantial changes that forced faculty, administrators, and students to adjust to new ways of conducting their day-to-day operations.

This particular study was designed to address the following questions:

- How concerned are higher education academic administrators about future enrollment at their institution? Does the level of concern vary by type of institution?
- Are institutions addressing their concerns with class-level changes by moving courses to online and/or hybrid delivery formats?
- Are institutions making program-level changes to address enrollment concerns, and if so, what types of changes are they making?
- Are academic administrators employing new or different outreach and marketing efforts to attract more students?

The data for this report come from the seventh round of DLPS data collection conducted in September 2022. Responses were received from 1,206 faculty and administrators and 2,358 students, representing 1,252 institutions from all 50 states and the District of Columbia. Questions about enrollment concerns and current and planned activities to address these concerns were received from 709 academic administrators, representing the broad scope of higher education institutions.

The sample for the study were academic administrators with knowledge of their institution's enrollment plans and efforts. As is true for most higher education positions, the specific titles of the responding administrators covered a wide range. Common titles included Provost, VP Academic, and Academic Dean, as well as titles that included phrases like 'Program Director' or 'Chairperson.'

Summary and Overview

"If there was a silver lining in the calamity of the pandemic, then it would be the forcing of community colleges to expedite the long-delayed transformation of its culture to a more technological and resilient nature."

"I feel like COVID only exacerbated our institution's financial issues, and now we're searching for anything to help. We're a small residential liberal arts college who is moving away from our core values to chase after the hottest new thing."

Concerns about future enrollments are pervasive across all of higher education. Only 11% of the surveyed academic administrators said they were not concerned. Individual levels of concern varied, with the largest group (37%) classifying themselves as having a high level of concern.

Administrators at two-year institutions expressed higher levels of concern about future enrollments than those at four-year schools. Still, at least 80% of administrators at all institutions expressed concern about future enrollments.

Course-level Responses

Virtually all institutions are providing more courses online or in hybrid formats in an effort to address their enrollment concerns. A majority have already started this effort, with most of the remaining institutions reporting that they have not yet begun, but plan to do so. The net result is that over 80% of institutions say they have already or will soon move more courses to online delivery. A similar proportion of institutions reported that they have or will soon move more courses to hybrid delivery.

Administrators at two-year institutions, where the level of concern is highest, are the most likely to have already started this effort. Only 10% of two-year institutions say they are not planning to move more courses online, and only 8% do not intend to move more courses to hybrid delivery.

Program-level Responses

The majority of institutions are also making a number of program-level changes to attract additional students. The most common approaches are to revise existing programs to improve student retention, and to attract more students. About one-half of institutions have already started both efforts, with about an additional 40% reporting that they are planning to do so.

Adding new programs is slightly less common than revising existing programs. That said, over a third of institutions report that they have already added a micro-credential program. A similar number say that they have added programs designed for “stopped-out” students (those who attended a college but did not receive a degree). Other institutions say they will add such programs, bringing the total to over 60% of institutions either offering or planning to offer these programs.

Outreach and Marketing Responses

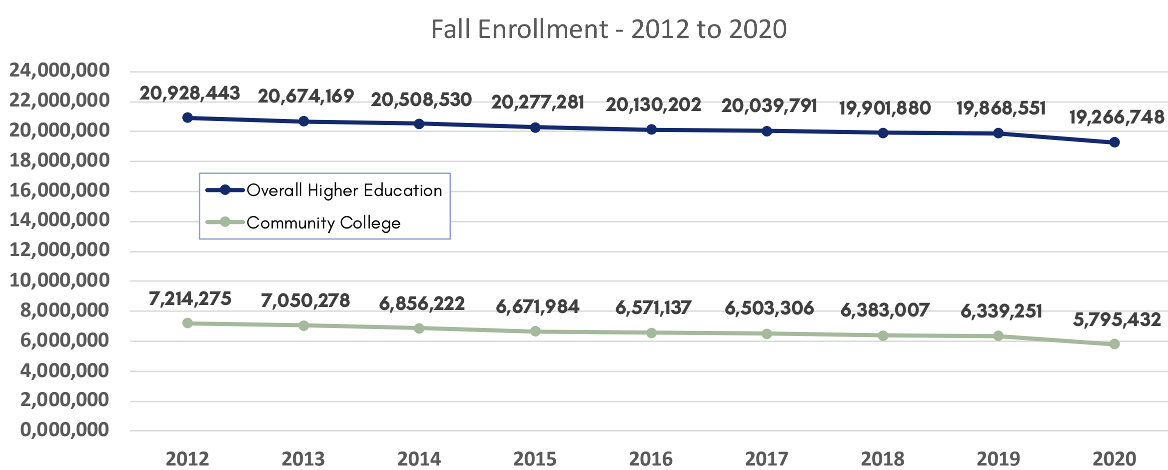
In addition to making changes in their course and program offerings, institutions are engaging multiple strategies to attract additional students. For example, two-thirds of institutions are already conducting college fair days, with half the remaining saying they plan to add them. Working with alumni is somewhat less common, but three-quarters of all institutions report using or planning to use this approach.

A majority of administrators report that their institution has already begun marketing to new demographics, with an additional third saying that this is in their plans. However, most of these efforts are being conducted in-house by the institution itself. Less than one-in-five institutions are already partnering with an external enrollment management firm, with 15% saying they plan to do so.

Declining Enrollments

It's tempting to attribute the current decline in enrollments to the massive upheaval in higher education caused by teaching during a global pandemic. But while the pandemic-induced changes are substantial, they build on a decade-long trend in higher education. It's necessary to consider this longer-term trend and the pandemic's impact to truly understand higher education's current and potential future state.

Higher education enrollments have been on the decline for years before the COVID-19 pandemic. According to the IPEDS data[1], enrollments declined by more than a million students in the seven years prior to the pandemic, representing a drop of 5.1% between 2012 and 2019. The decline among two-year institutions was even greater, decreasing by 12.1% over the same period.



The pandemic exacerbated the trend; between Fall 2019 and Fall 2020 the number of students enrolled in U.S. higher education decreased by 600,000 or 3%. Almost all of that decrease (540,000 students) came from two-year institutions, where the year-to-year drop was 8.6%.

[1] https://nces.ed.gov/ipeds/use-the-data

Enrollment data from IPEDS has the advantage that it is comprehensive and covers all higher education institutions. The drawback to the data is the lag between data collection and publication. However, the National Student Clearinghouse Research Center[2] also collects enrollment data and can provide more timely estimates.

The National Student Clearinghouse estimates show an overall decline of 0.5% in enrollment between Spring 2019 and Spring 2020, followed by a 3.5% decline to Spring 2021 and a further 4.1% decline between spring 2021 and Spring 2022. The enrollment loses were most pronounced at public institutions, especially two-year public institutions.

Estimated National Enrollment by Institutional Sector: 2020 to 2022

	Spring 2022		
	Enrollment	*Change*	*% Change from prior year*
Public 4-year	7,252,413	-253,437	-3.4%
Private 4-year	4,399,872	-66,606	-1.5%
Public 2-year	4,169,930	-351,116	-7.8%

	Spring 2021		
	Enrollment	*Change*	*% Change from prior year*
Public 4-year	7,505,850	-45,394	-0.6%
Private 4-year	4,466,478	-39,347	-0.9%
Public 2-year	4,521,046	-475,997	-9.5%

	Spring 2020		
	Enrollment	*Change*	*% Change from prior year*
Public 4-year	7,551,244	-46,703	-0.6%
Private 4-year	4,505,825	-40,824	-0.9%
Public 2-year	4,997,043	-114,295	-2.3%

[2] https://nirsa.net/nirsa/2022/06/29/recent-reports-shed-new-light-on-college-enrollment-trends/

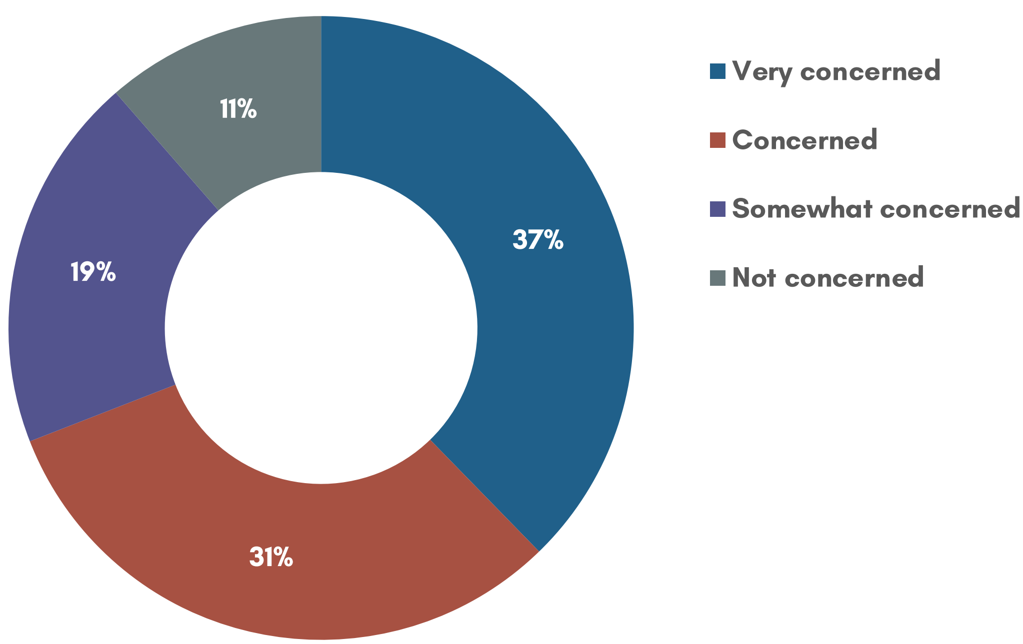
ENROLLMENT CONCERNS

"The last year have brought many good changes to the profession; the hope is we can combine that with the previous decades of 'the way things were done' and put together a much better experience for the students."

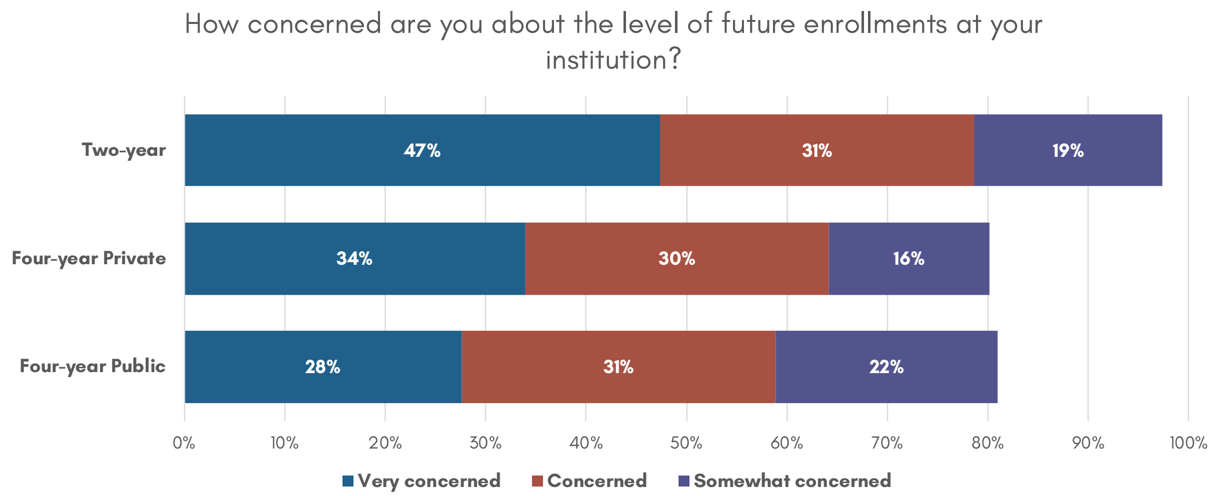
"Demographics and attitudes about higher education are shifting. The older models of providing education must be updated. Institutions that do not adapt risk their existence."

Nearly 90% of all surveyed academic administrators expressed some level of concern about future enrollments for their institution. Over a third reported that they were 'Very concerned,' with an additional 31% stating that they were 'Concerned.' Only 11% of academic administrators said they were not concerned.

How concerned are you about the level of future enrollments at your institution?



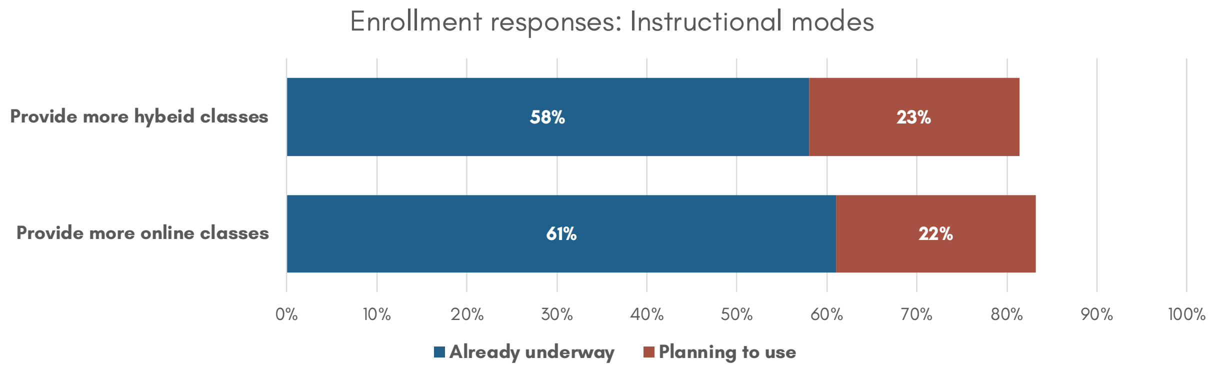
Given that the most significant enrollment declines have been among the two-year institutions, it is not surprising that they also express the greatest concern about future enrollments. Nearly one-half (47%) report being 'Very concerned,' with 31% stating that they are 'Concerned.' Only 3% of two-year institution administrators said they were not concerned about future enrollments.



While expressing less concern than their compatriots at two-year institutions, administrators at four-year institutions are also concerned about future enrollments. Administrators at four-year public institutions are slightly less concerned than those at four-year private institutions; however, a majority at all types of institutions say that they are 'Concerned' or 'Very concerned' about future enrollments.

INSTRUCTIONAL MODES

Administrators were asked what approaches they were taking or planning to take to address their concerns about future enrollments. A common response across all types of institutions was to deliver more courses online or in a hybrid teaching mode. Virtually all institutions (more than 80%) have increased the number of online and hybrid courses or are planning to do so in the future.

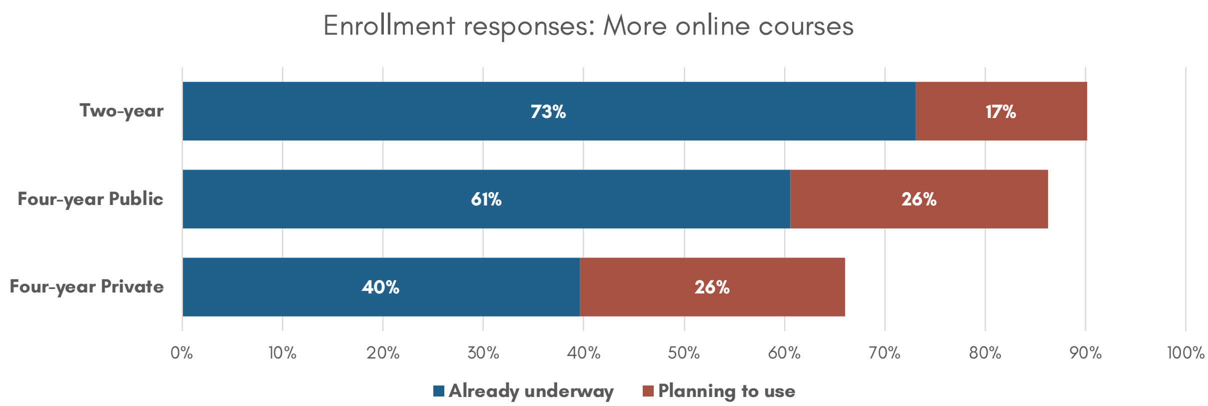


Online Courses

"There is no magic bullet for enrollment and online seems attractive, but it is low hanging fruit."

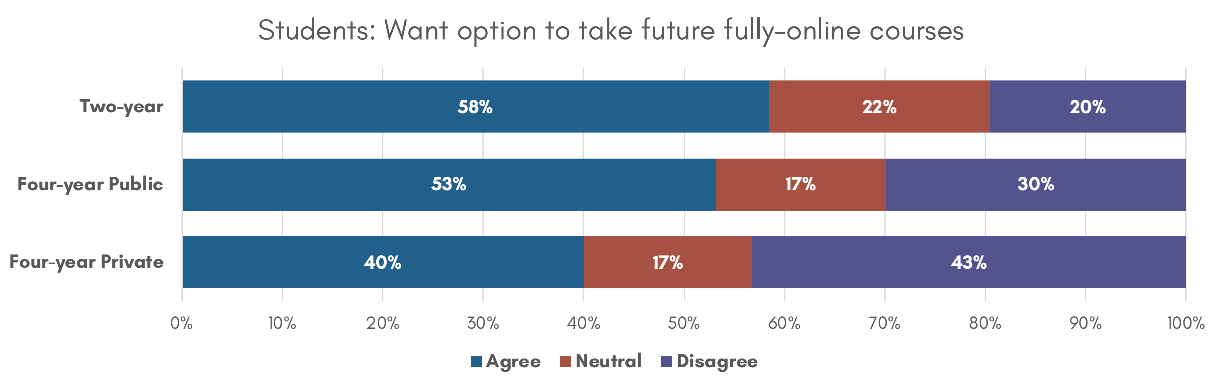
"I believe online instruction is here to stay because it is more convenient and less expensive for students (no travel costs, no parking fees, and no costs for childcare) and students are more savvy to technology and online instruction now after Covid."

Two-year institutions have been the most aggressive in adding online courses, with 73% reporting that they have already begun this effort to address future enrollments. An additional 17% of two-year schools report that they have not yet done this, but are planning to in the future, leaving only 10% that do list more online courses as part of their strategy to dealing with future enrollments.



Four-year public institutions lag slightly behind two-year schools in embracing an increase in online courses to address future enrollments. Four-year private schools are somewhat less likely to include more online courses as a strategy to address enrollments.

The pattern of institutional responses appears to reflect student preferences at these institutions. Students at two-year institutions are most likely to desire online courses, followed by those at four-year public institutions. Those at four-year private institutions are least likely to express this preference.

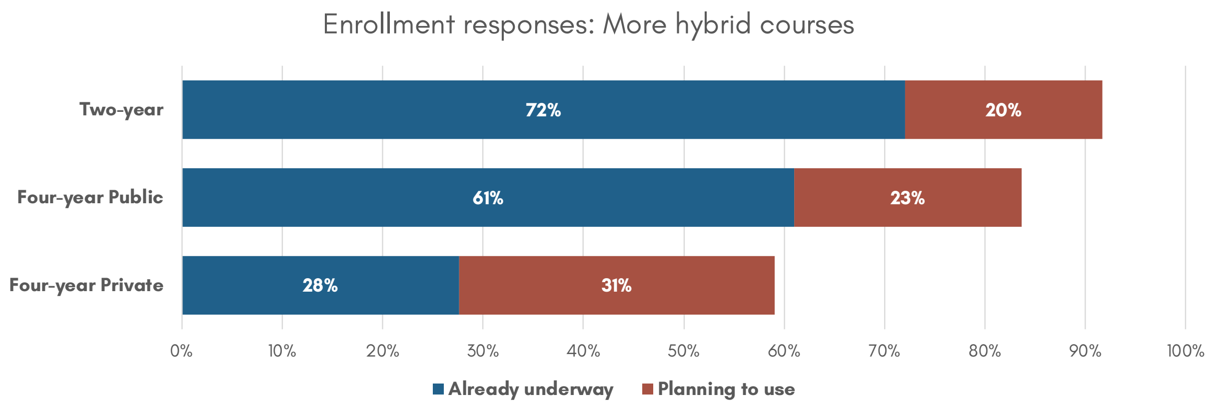


Hybrid Courses

"Although our experience with hybrid courses was mixed, we do plan to try to incorporate more hybrid courses into some of our master's programs, because it will broaden their reach and allow us to attract more students."

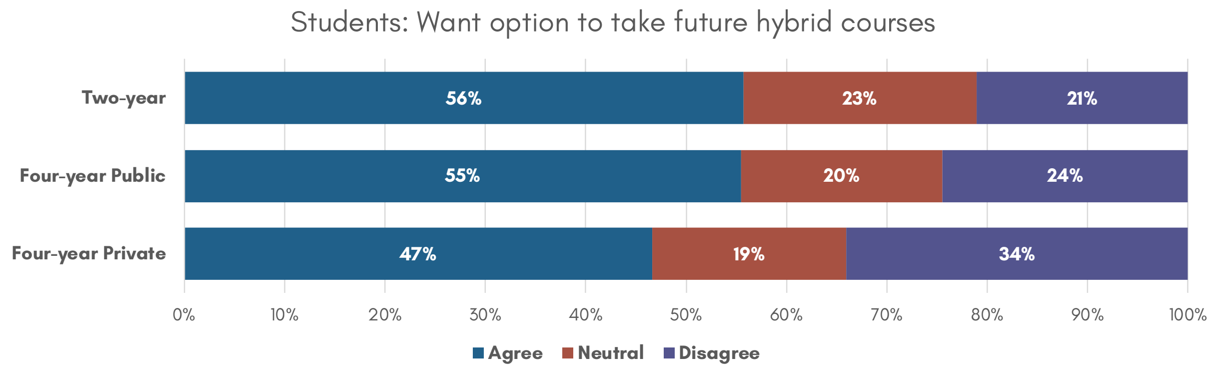
"It's been challenging, but absolutely see the value of blended teaching."

The results for adding additional hybrid courses are similar to those for adding online courses. Two-year institutions have been the most aggressive in adding hybrid courses, with 72% saying they have already begun this effort. An additional 20% of two-year schools report that they haven't yet done so, but are planning to in the future. That leaves only 8% who do not list more hybrid courses as a strategy for dealing with future enrollments.



One difference is seen among four-year private institutions, which report that they are less likely to introduce more hybrid courses to address enrollment issues than other institutions. However, even here a majority of institutions say that they are already adding hybrid courses, or plan to do so.

The results are slightly at odds with stated student preferences; students at four-year private institutions are only somewhat less likely to prefer hybrid courses than those at four-year public or two-year institutions.



Online and Hybrid Courses

Most institutions are adding courses in both modes. Three-quarters of institutions that expressed concern about future enrollments currently have or have planned efforts for adding both online and hybrid courses. Less than 10% of such institutions have no plans for either online or hybrid courses, with the remainder equally split between those who favor online and those who prefer hybrid courses.

Revising Programs

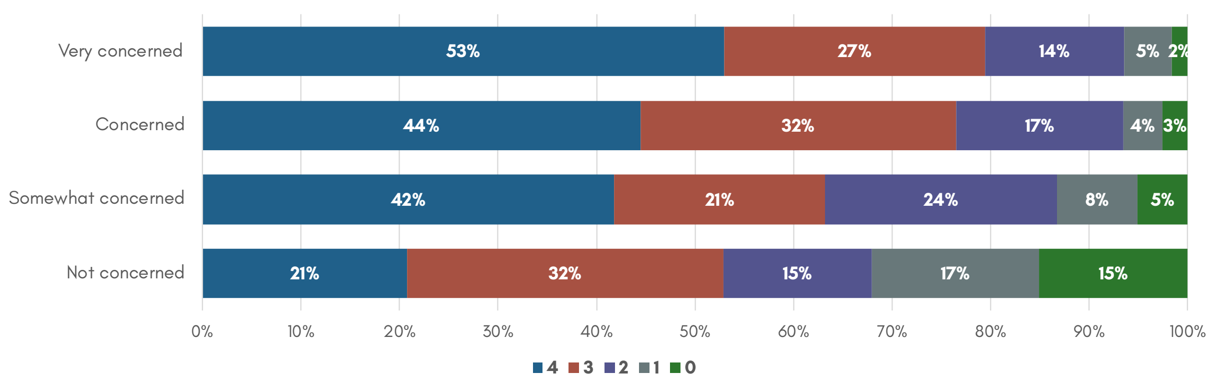
"As we evaluate the longer-term enrollment trends and the cost of providing higher education, we are analyzing options to enable the College to better serve our community. We continue to look for growth opportunities."

"Our institution is facing serious financial troubles that fundamentally threated our liberal arts core identity. The response has been to put more resources into specific pre-professional programs and to basically starve everyone else."

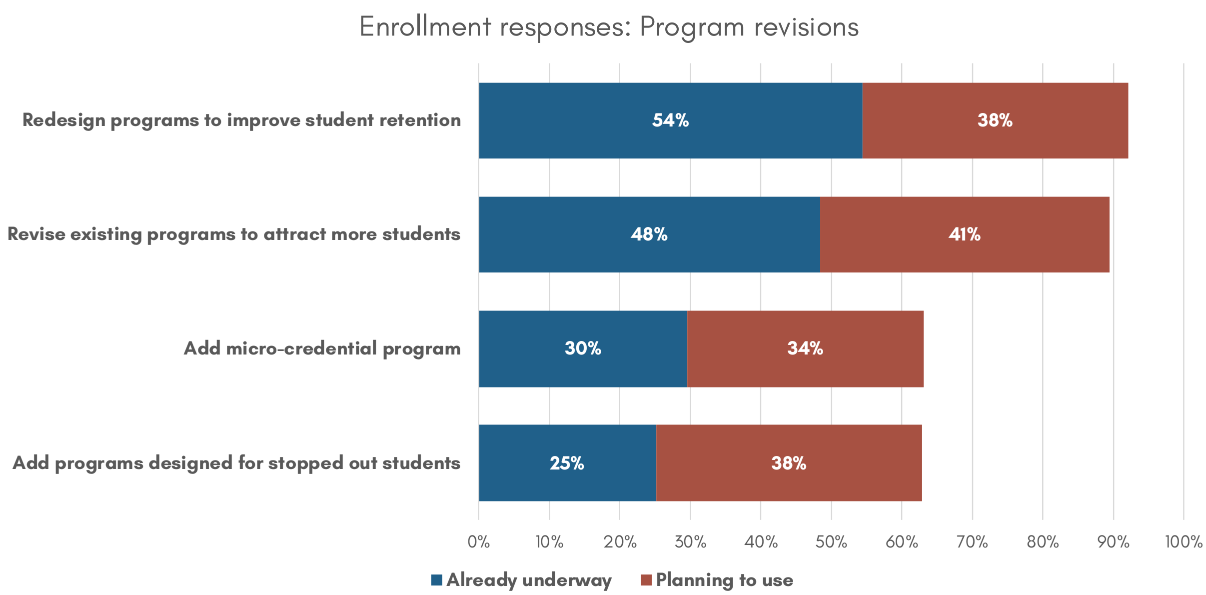
While changes in delivery mode can be incorporated into existing programs, academic administrators were also asked about new or modified programs they had completed or planned to complete, to address enrollment concerns. The majority of institutions that said that they were very concerned about enrollments reported that they had already planned or were planning efforts in all four of the areas in the survey, with less than 2% not planning any efforts.

There is a clear relationship between the level of concern about future enrollments and the number of program-related activities in place or planned by institutions. For example, institutions that reported that they are 'Very concerned' are more than twice as likely to be engaged in all four program-related changes examined than are institutions without enrollment concerns. Likewise, very few (5% or less) institutions with any level of enrollment concerns are not engaged in any program efforts, compared to 15% among institutions that are not concerned about future enrollments.

Number of types of program revisions or additions by level of enrollment concern



The most common activity was to revise existing programs to improve student retention or to attract more students. About one-half of institutions have already started both efforts, with an additional 40% planning to do so.

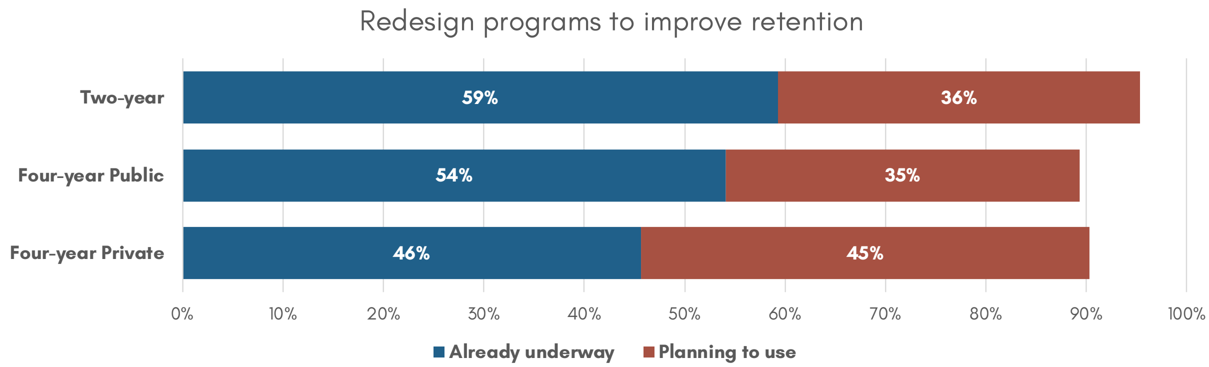


Adding new programs is less common than revising existing programs. However, 30% of institutions report they have already added a micro-credential program. A somewhat smaller number (25%) say that they have added programs designed for stopped-out students. Other institutions say they will add such programs, bringing the total to over 60% of institutions either offering or planning to offer these programs.

Revise Programs to Improve Retention

"The enrollment in our online courses is strong but students are way more likely to drop out or fail an online course."

Retaining more of an institution's current students is at the top of the list of strategies being considered to address declining enrollments. Virtually all two-year institutions report that they are already doing this (59%) or plan to do so (36%). Public and private four-year institutions are only slightly behind, with 54% of the public and 46% of the private institutions already employing this strategy.

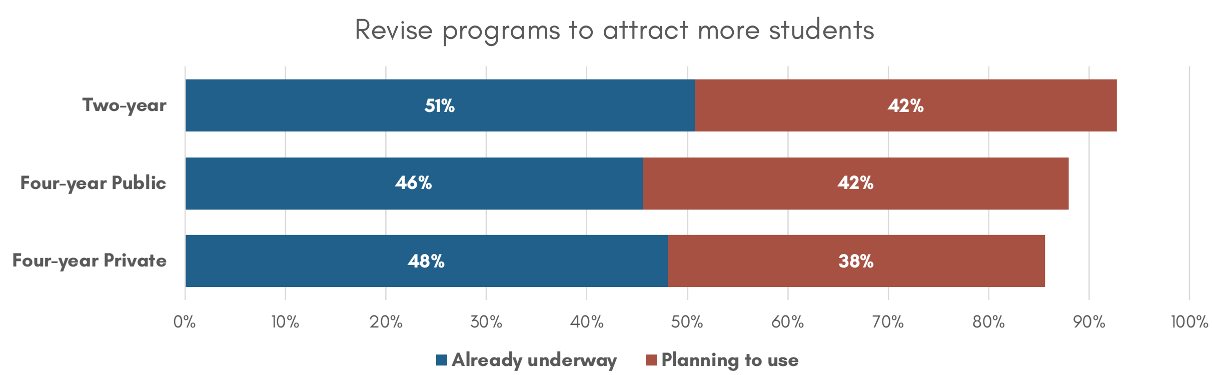


Revise programs to Attract More Students

"The students have changed after the pandemic they do not want to be told what to take they do not want to go to college, they do it because they have to. We need to change this, students should only go to college if they WANT to. We need to reimagine education, and it is time to end the liberal arts model, and move to a student focused approach to education."

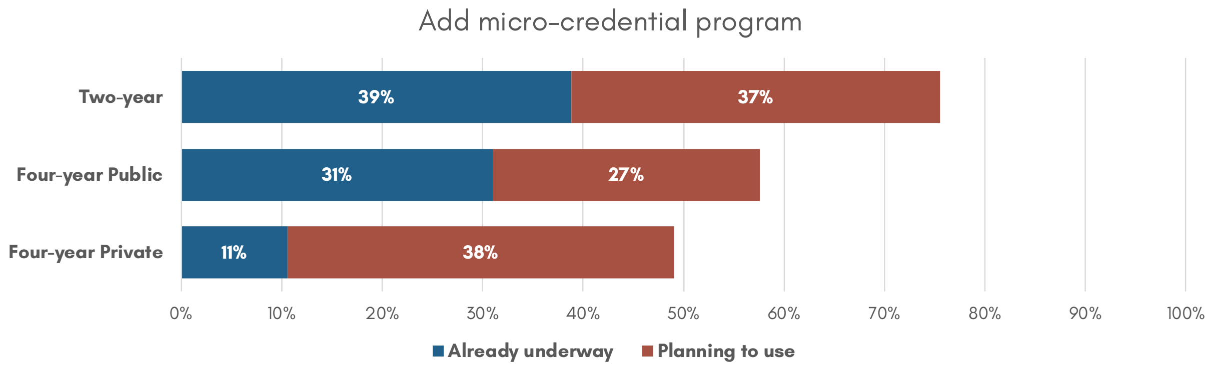
"Many of our students could not be in classes if they did not have the option of online and they tell me so — we are a community college and our population is diverse, with life challenges. So we are serving our population."

In addition to trying to retain more students, institutions are revising programs to make them more attractive to new students. The approaches used vary from institution to institution, with over 80% either already having made these changes or planning to attract additional students.



Micro-credential Programs

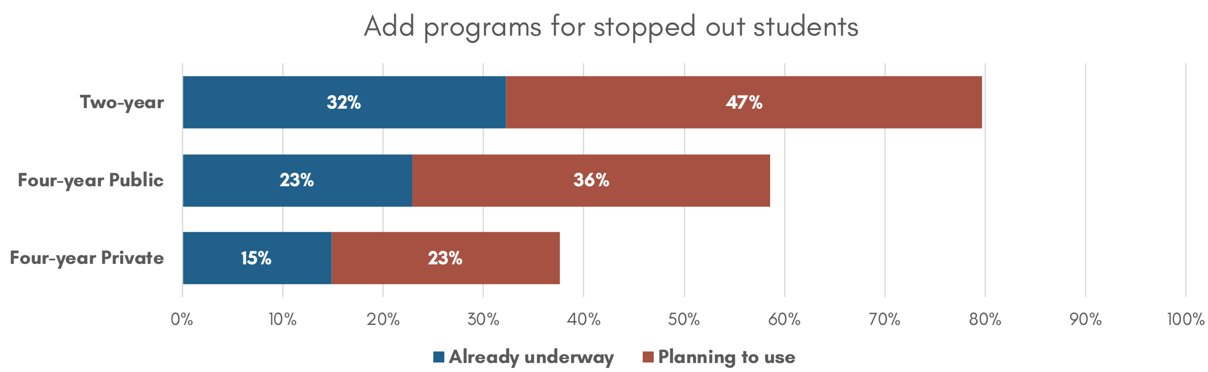
The addition of micro-credential programs to drive enrollment is more popular at two-year institutions than at four-year institutions. Four-year private institutions, in particular, are the least likely to have used this approach. However, even among this group, almost half report that they already have or are planning to add micro-credentials.



Programs for Stopped-Out Students

> *"More work needs to be done to reach the 40 million Americans who have some college no degree (SCND). Higher ed is leaving too many people behind. We focus on the 40-50% who are making it through the "gates of success"; let's pay more attention to the other 60-50% that our current processes and framework drop off along the way."*

There are more than twice as many stopped-out students than there are currently enrolled students. Institutions appear to be very aware of this potential audience, and are trying to get them to re-enroll. Two-year institutions are the most aggressive in this area, with nearly 80% with existing or planned efforts.

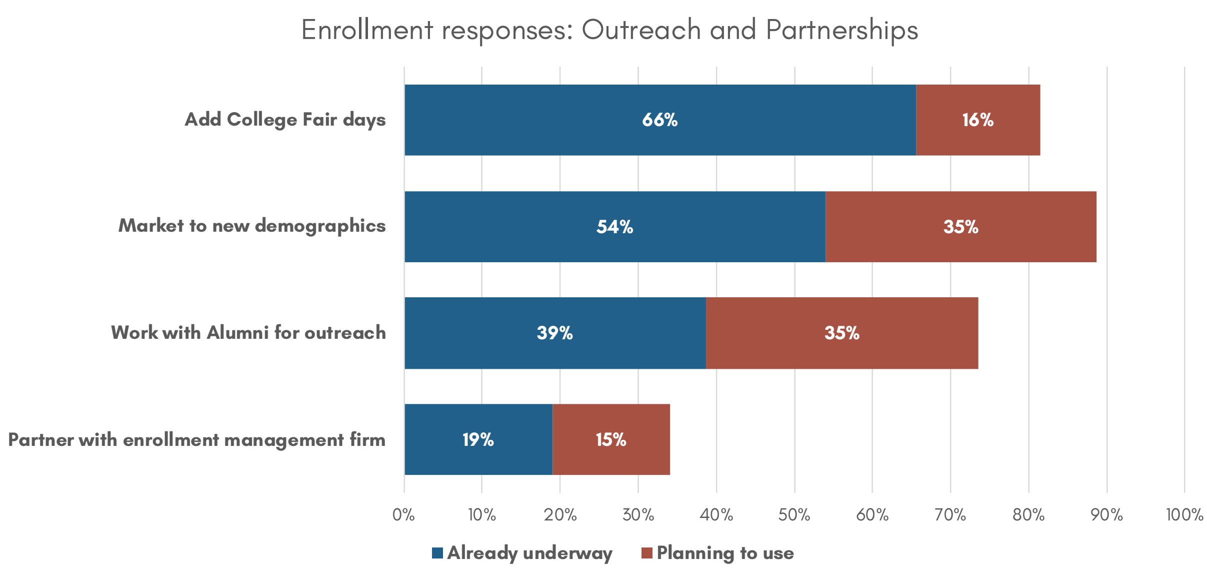


OUTREACH AND PARTNERSHIPS

"Online is more accessible for so many demographics of students (think global markets for enrollment). It saves time and money on commuting to campus."

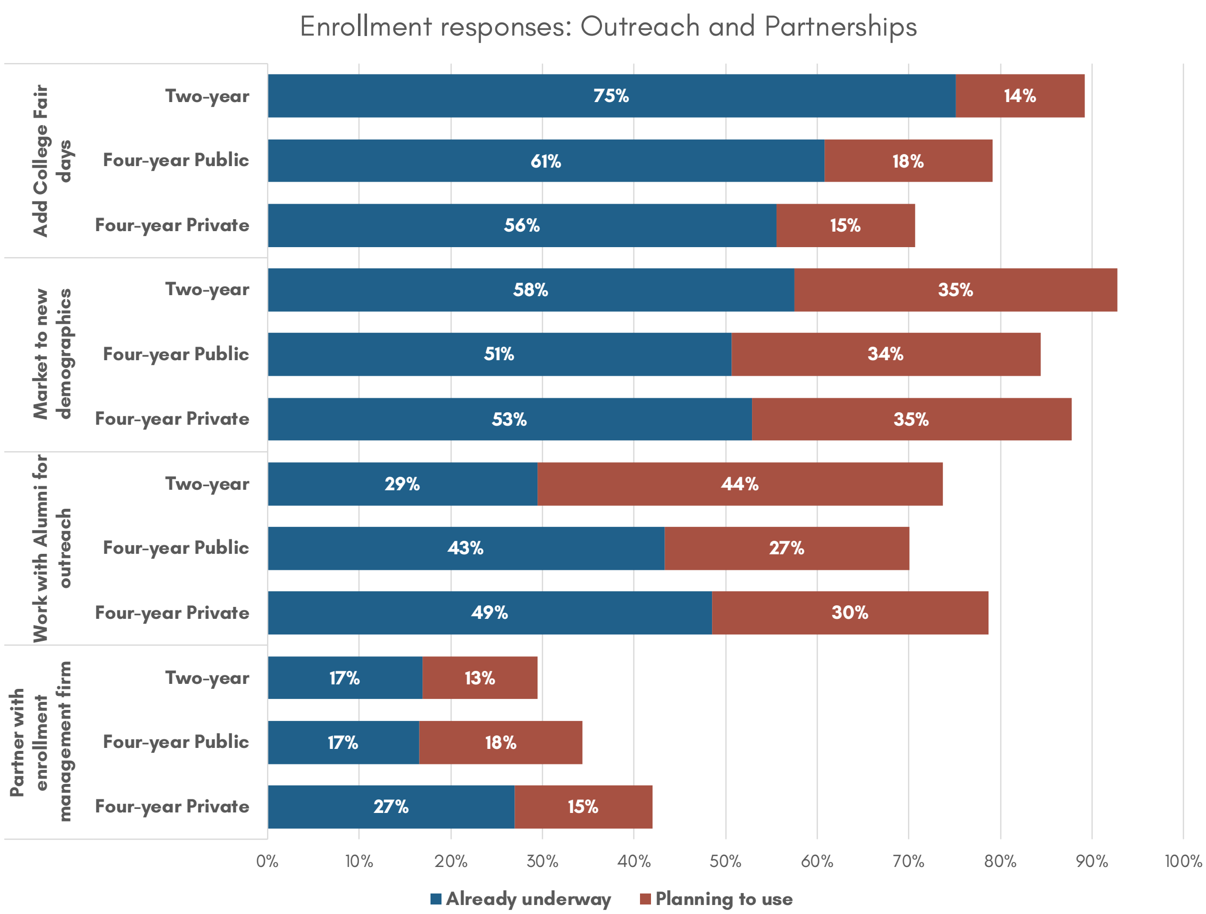
"In my view, … we risk losing sight of some of the goals of the institution, and of our societal contribution. We cannot simply try to sell a marketable product, and the goal of the institution cannot be simply to continue to exist as an end in itself."

In addition to making changes in their course and program offerings, institutions engage multiple strategies to attract additional students. Two-thirds are already conducting college fair days, with half of the remaining saying they plan to add them. Working with alumni is somewhat less common, but three-quarters of all institutions report using or planning to use this approach.



Most administrators report that their institution has already begun marketing to new demographics, with an additional third saying that this is in their plans. However, most of these efforts are being conducted in-house by the institution itself. Less than one-in-five institutions are already partnering with an external enrollment management firm, with 15% saying they plan to do so.

Except for working with alumni (where two-year institutions are less likely) and partnering with enrollment management firms (where four-year private institutions are more likely), the marketing and outreach efforts pattern is very similar across all types of institutions.



Next Steps

The current research demonstrates that institutions have real concerns about future enrollments and are employing multiple strategies to address these concerns. How will institutions track and understand if their efforts are working?

Enrollment Concerns Are Widespread

Nearly 90% of all surveyed academic administrators expressed some level of concern about future enrollments for their institution, with 37% reporting a high level of concern. While concern is pervasive, administrators at two-year institutions expressed the highest levels of concern.

Institutions Are Employing Multiple Responses

This research shows that almost all institutions have already or are planning to add more online and hybrid courses to improve future enrollments. They are also making multiple plans to revise or add to their existing programs and to engage in additional marketing and outreach efforts.

Will It Work?

We do not yet know to what extent each of these efforts will be effective. Given that most institutions are making very similar strategic decisions on approaches to address their enrollment concerns, how will they know if their efforts are making a difference? How will institutions track the impact of their efforts to understand which have been successful and which have not?

A larger question facing all higher education is whether institutions engage in a zero-sum game. Is it the case that institutional efforts will not enlarge the total pool of enrolled students but rather merely reach students who would have gone to another institution?

Research Questions

The current results suggest several issues for further research; among these are:

- How will intuitional strategies evolve as they see which efforts are most effective and which are not?
- Will the student demand for online and hybrid courses continue?
- Will the specific online and hybrid course formats being offered by higher education institutions match the desires of potential students?
- Which institutions will be most successful with their new and revised program offerings?
- Will the revision of existing programs and the addition of new programs harm existing programs?
- What marketing efforts will have an impact, and which will not?
- Will institutions be successful in enticing stopped-out students to return?

Future rounds of the Digital Learning Pulse Survey project will examine questions like these to track how well higher education is in dealing with declining enrollments.

Methodology

Information for this report comes from the Digital Learning Pulse Survey. This project has conducted multiple national surveys of higher education students, academic administrators, and teaching faculty.

The primary survey outreach for faculty and administrators was via direct email mailing lists from Market Data Retrieval. The list included a representative sample of all U.S. higher education teaching faculty (defined as faculty teaching at least one course during the current academic year) and a representative sample of relevant academic administrators (e.g., provosts, deans, and department heads).

Outreach efforts by the various partner organizations supplemented the primary faculty and administrator sample. These organizations publicized the project to build overall response rates and directed survey invitations to their members and those on their mailing lists.

Participants

The project has conducted a total of seven rounds of data collection, the first in April 2020 and the most recent in September 2022. Participant institutional affiliation was matched to the federal Integrated Postsecondary Education Data System (IPEDS) to retrieve institutional data, allowing for analyses by institution characteristics.

Results for the current study are derived from the most recent round of data collection (September 2022). Responses were received from 1,206 faculty and administrators and 2,358 students, representing 1,252 institutions from all 50 states and the District of Columbia.

Materials

With a few exceptions, the questions in the survey were common across faculty, administrators, and students. Where appropriate, questions included an 'other' response, where the respondent could provide a detailed answer.

Procedures

All data were checked for completeness, missing values, or incorrect codes. All responses entered as 'other' were reviewed to determine if they should also be coded as one of the fixed responses. Respondents could skip any question; however, very few respondents skipped questions (less than 2%). All surveys where respondents completed less than three-quarters of the eligible questions were omitted from the analysis.

Potential participants had the option to receive a copy of a final summary report. Names and email addresses were removed from the data before analyses. To ensure confidentiality and anonymity, results were presented in aggregate and summary statistics.