The New England Enrollment “Perfect Storm”

National and Regional Demographic Trends that Impact Institutions of Higher Education in New England

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About the New England Board of Higher Education (NEBHE)

• Interstate compact founded by 6 New England governors in 1955

• Signature Programs and Research Services:
What enrollment challenges are you currently facing?
Projected Number of High School Graduates in New England by Sector: 2016-2031

- Grand Total:
  - 162,252 (2016)
  - 140,273 (2031)

- Private Schools Total:
  - 21,217 (2016)
  - 16,155 (2031)

- Public School Total:
  - 141,035 (2016)
  - 124,120 (2031)
Fall Undergraduate Enrollment at Degree-Granting Postsecondary Institutions in New England, by Sector: 2009-2016

- 4-Yr Public
- 4-Yr Private Nonprofit
- 4-Yr Private For Profit
- 2-Yr Public

<table>
<thead>
<tr>
<th>Year</th>
<th>4-Yr Public</th>
<th>4-Yr Private Nonprofit</th>
<th>4-Yr Private For Profit</th>
<th>2-Yr Public</th>
</tr>
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<tbody>
<tr>
<td>2009</td>
<td>5,357</td>
<td>211,636</td>
<td>284,615</td>
<td>236,072</td>
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<tr>
<td>2010</td>
<td>11,034</td>
<td>241,789</td>
<td>355,447</td>
<td>236,072</td>
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<td>2011</td>
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<td>2016</td>
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436,000
Total enrollment at public 2- and 4-year postsecondary institutions in New England.

55%
Percentage of students in New England enrolled at public institutions

1.8%/8,036
Decline in enrollment at New England’s public colleges and universities from 2015 to 2016.

US
- Under 18: 18.8%
- 18-19: 16.2%
- 20-21: 18.6%
- 22-24: 21.2%
- 25-29: 18.0%
- 30-34: 15.9%
- 35 and older: 14.1%

New England
- Under 18: 16.0%
- 18-19: 14.9%
- 20-21: 15.9%
- 22-24: 22.2%
- 25-29: 22.7%
- 30-34: 7.6%
- 35 and older: 14.1%
Postsecondary Attainment of Adults (Aged 24-49) in New England: 2016

- **High School Diploma/GED**
  - CT: 21.3%
  - ME: 28.3%
  - MA: 28.4%
  - NH: 23.2%
  - RI: 14.9%
  - VT: 16.3%

- **Some College, No Degree**
  - CT: 14.9%
  - ME: 23.2%
  - MA: 18.5%
  - NH: 16.6%
  - RI: 7.0%
  - VT: 11.0%

- **Associate's**
  - CT: 11.0%
  - ME: 8.4%
  - MA: 7.0%
  - NH: 12.5%
  - RI: 11.2%
  - VT: 9.2%

- **Bachelor's**
  - CT: 7.3%
  - ME: 14.5%
  - MA: 14.5%
  - NH: 19.2%
  - RI: 8.5%
  - VT: 9.2%

- **Master's**
  - CT: 28.3%
  - ME: 20.9%
  - MA: 16.5%
  - NH: 22.6%
  - RI: 18.7%
  - VT: 11.0%

- **CT**
- **ME**
- **MA**
- **NH**
- **RI**
- **VT**
Postsecondary Attainment of Adults (Aged 24-49) in New England, by Age Group

- **High School Diploma/GED**
  - 24-34: 19.9%
  - 35-49: 16.3%

- **Some College, No Degree**
  - 24-34: 16.5%
  - 35-49: 16.2%

- **Associate’s**
  - 24-34: 3.9%
  - 35-49: 8.5%

- **Bachelor’s**
  - 24-34: 32.0%
  - 35-49: 25.9%

- **Master’s**
  - 24-34: 13.6%
  - 35-49: 15.3%

- **CT**: 8,377, 7,678
- **ME**: 5,607, 6,519
- **MA**: 2,467, 4,373
- **NH**: -116, 1,235
- **RI**: -753, -4,586
- **VT**: -4,949, -3,069
Leading Places of Origin for Foreign Students in New England: 2017

- China is the lead place of origin for 5 of New England’s 6 states.
- The exception is NH, where China is ranked #2. India is ranked #1.
- Rounding out the top 6:
  - Saudi Arabia
  - South Korea
  - Japan

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<thead>
<tr>
<th>Rank</th>
<th>Place of Origin</th>
<th>% Total</th>
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<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>36.03%</td>
</tr>
<tr>
<td>2</td>
<td>India</td>
<td>18.48%</td>
</tr>
<tr>
<td>3</td>
<td>Canada</td>
<td>6.97%</td>
</tr>
</tbody>
</table>
Total Number of Public and Private 2- and 4-Year Colleges and Universities in New England: 2004-05 to 2016-17

- 259 institutions in 2004-05
- 240 institutions in 2016-17

Percent decline in supply of postsecondary institutions in New England since 2004-05: -7.33%

Number of fewer postsecondary institutions in New England since 2004-05 due to closure or merger: 19
A New Approach to Projecting Higher Education

A Look at Nathan Grawe’s Demographics and the Demand for Higher Education
Key Headwinds for New England:

Birth Rate in New England compared to other U.S. regions – low fertility rate holds steady

Immigration

Migration AWAY from New England and Northeast
Some Good News for the Northeast

• Children from the Northeast 40% more likely to attend college than their Western and South Central counterparts.

• Children from New England 10x more likely to attend a Top 50 university than their Western and South Central counterparts.

• High % of families with $100k+ household income + degree-holding parents
Higher Demand Index – Overview and Use

2 sets of info used to calculate:
1. # of 18 year-olds in geographic location in given year
2. Share of those students likely to attend college

-13%
Projected decline in community college enrollment in New England, 2025-2029

-25%
Projected decline in overall college enrollment (2- and 4-year) in New England, 2025 onward
## Higher Demand Index, cont.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Projections</th>
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<tbody>
<tr>
<td>2-Year Institutions</td>
<td>• 2% national increase through 2025, followed by sharp decline</td>
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<td>• 13% decrease by 2029</td>
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<td>• 15%+ decline in New England</td>
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<td>4-Year Institutions</td>
<td>• Modest (2%) growth until 2025, then steep decline</td>
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<td>• 2025-2029: projected loss of 280,000 students nationally</td>
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<td>• New England net decline of 25%</td>
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<tr>
<td>Overall</td>
<td>• Population growth shifting to Southwest, especially Hispanic population</td>
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<td>• 2025-2030: college-going population shrinking by 450,000</td>
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</tbody>
</table>
Small Group Activity

Thinking about the current enrollment challenges and those expected to begin in 2025 and beyond:

- What will be the impact for your sector?
- What can be done to expand demand for higher education in the region and beyond? How can we expand the “enrollment pie”? 
- What can be done to benefit institutions’ operating costs, financial stability, and economic models?
- Given the supply of institutions and persistent sustainability challenges, how can alliance strategies, mergers, and institutional transitions be best supported?
A Call to Action

• Realistic assessments of financial stability, competitive capacity, enrollment growth prospects

• Recognize demographic & workforce realities, incentivize & invest in innovative strategies for higher education

• Reduce/eliminate barriers to accelerated institutional experimentation, program innovation, alliance models
Questions?
Further Questions? Contact us!

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Please be sure to fill out the session evaluation at:

neacrao.org/feedback/

Thank you!