



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:

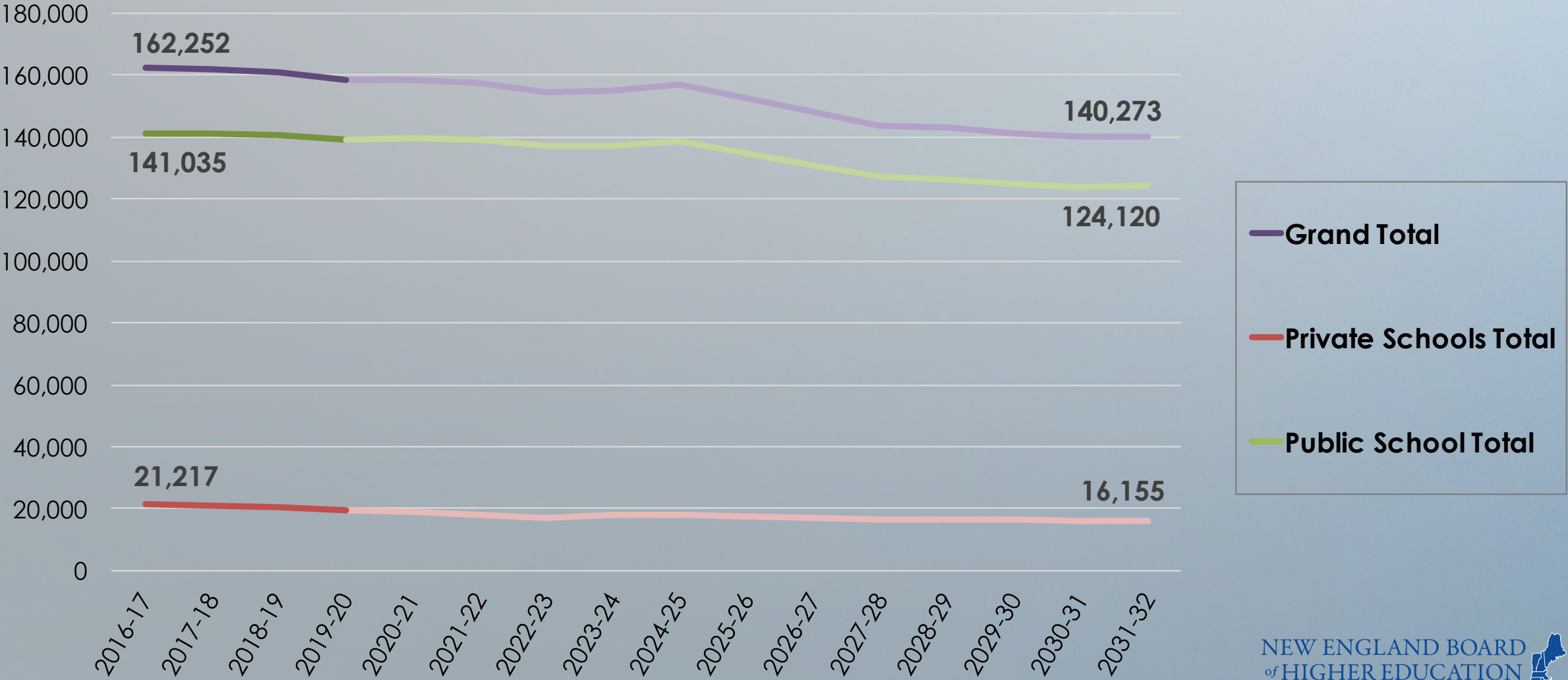
tuitionbreak



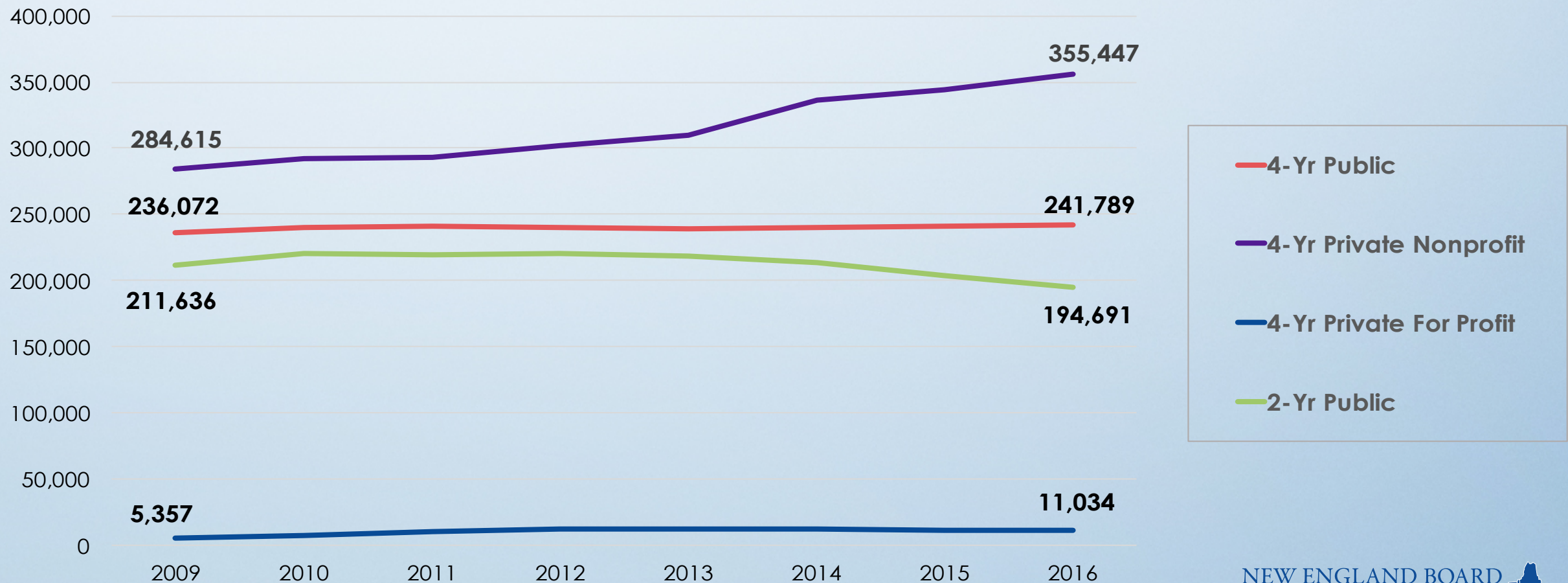


**What enrollment challenges
are you currently facing?**

Projected Number of High School Graduates in New England by Sector: 2016-2031



Fall Undergraduate Enrollment at Degree-Granting Postsecondary Institutions in New England, by Sector: 2009-2016



Share of Enrollment at Degree-Granting Postsecondary Institutions in New England, by Sector: 2016

436,000

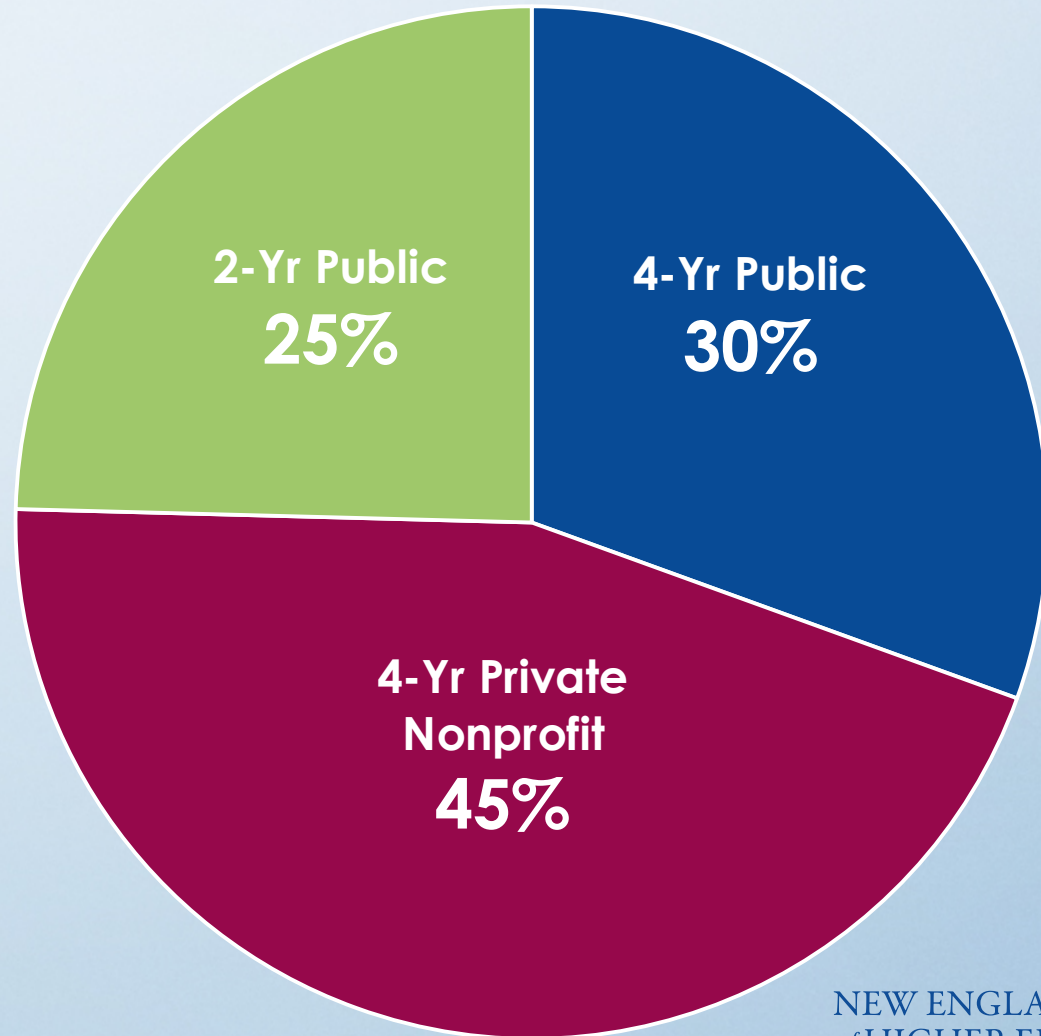
Total enrollment at public 2- and 4-year postsecondary institutions in New England.

55%

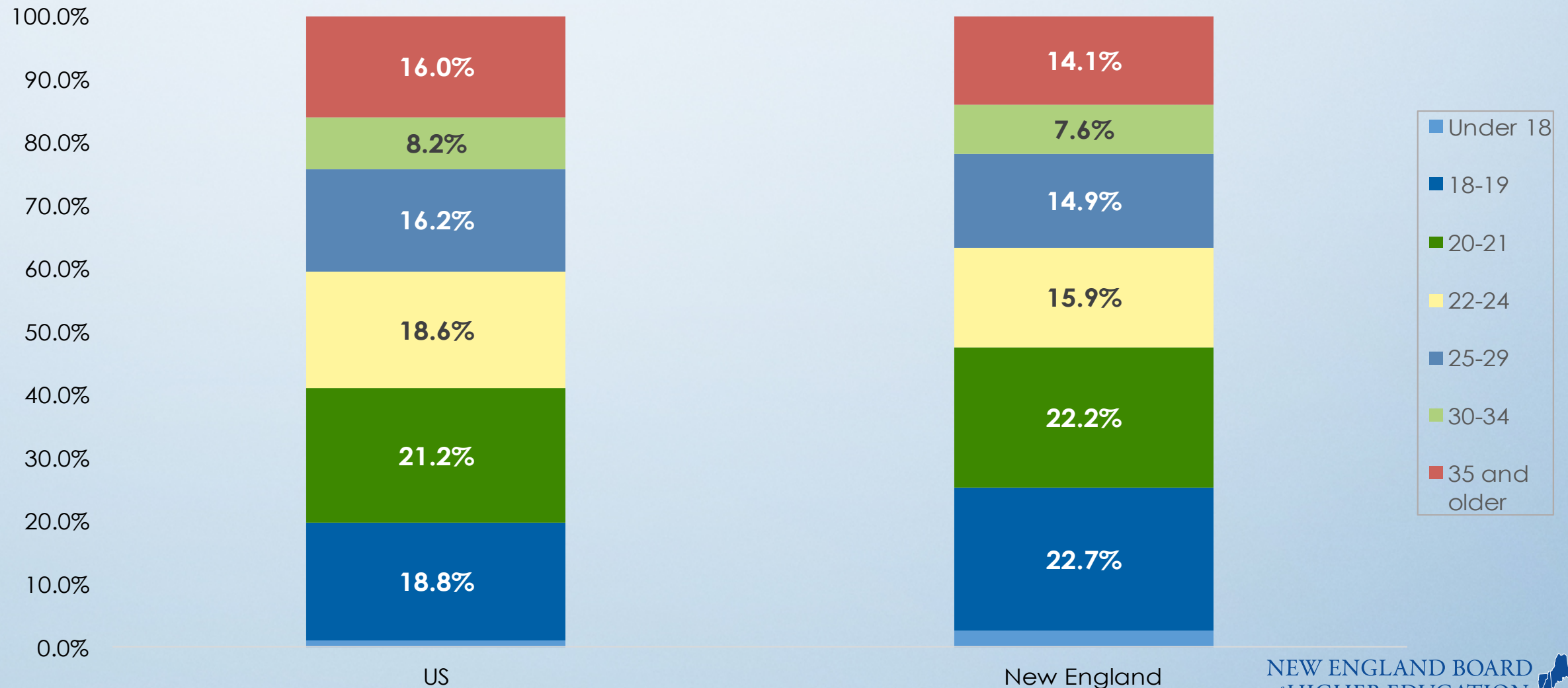
Percentage of students in New England enrolled at public institutions

1.8%/8,036

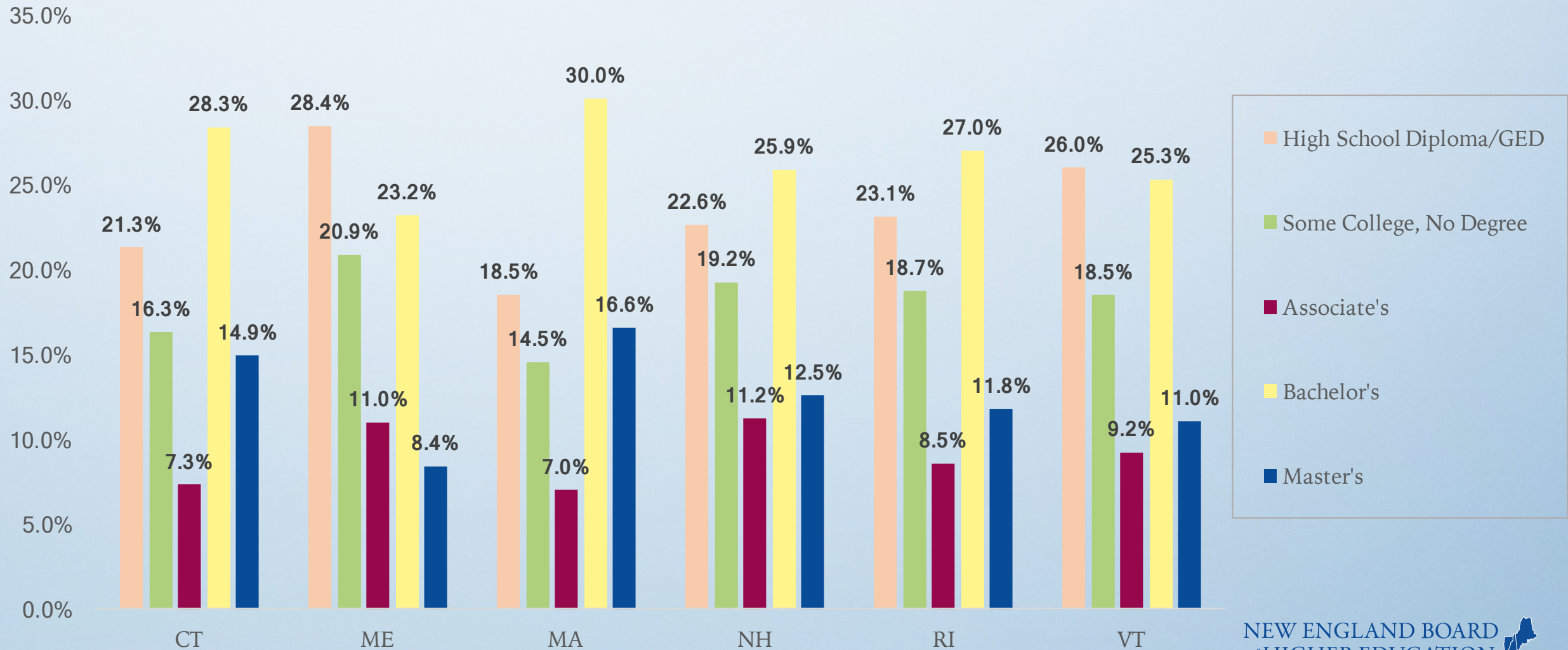
Decline in enrollment at New England's public colleges and universities from 2015 to 2016.



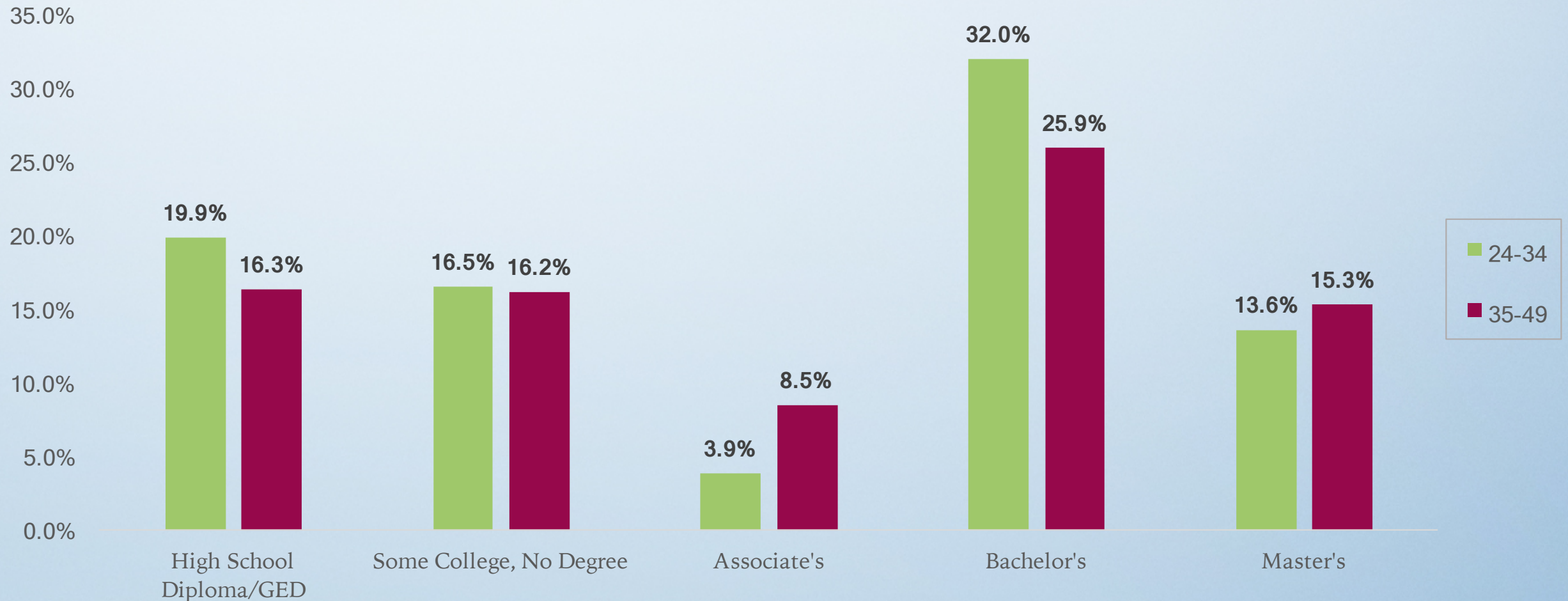
Postsecondary Enrollment by Age, U.S. vs. New England: 2016



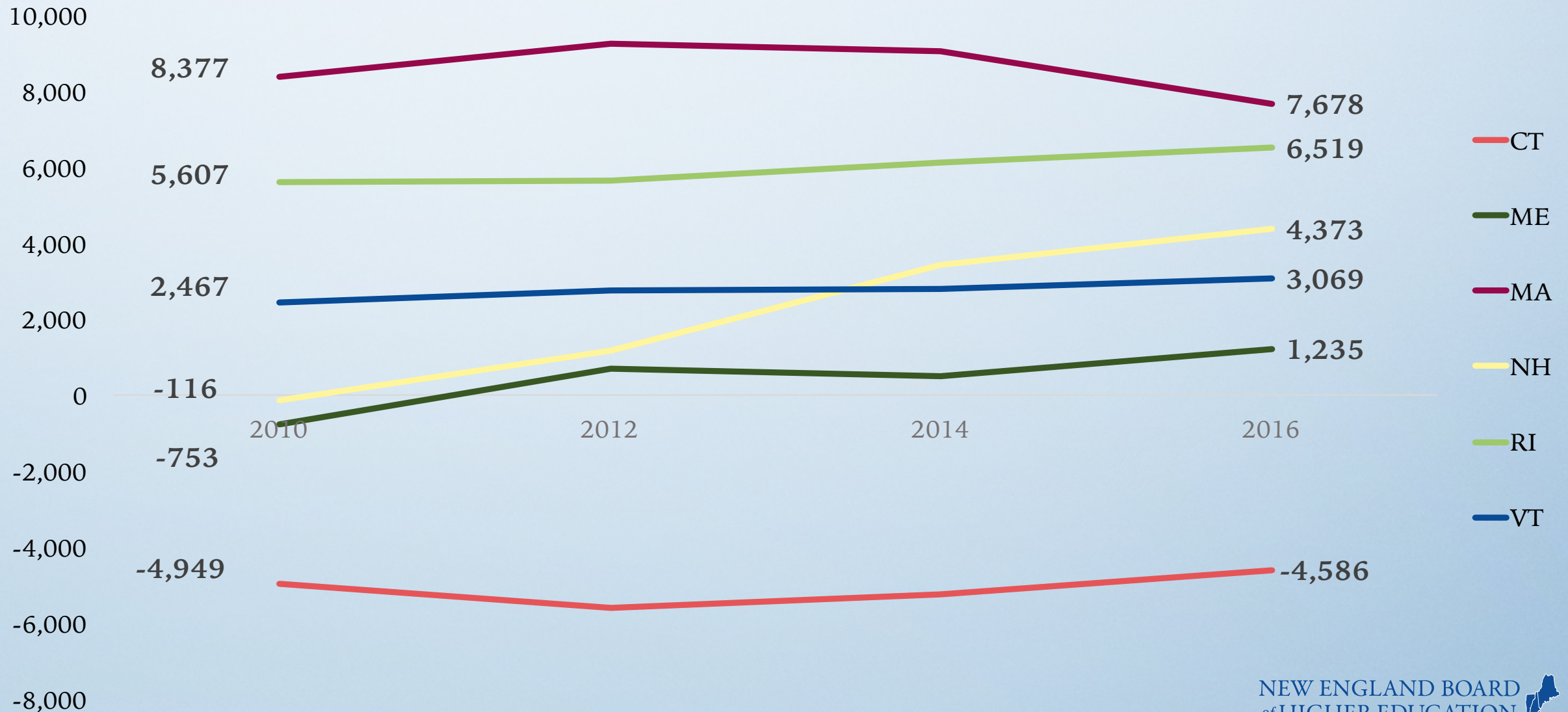
Postsecondary Attainment of Adults (Aged 24-49) in New England: 2016



Postsecondary Attainment of Adults (Aged 24-49) in New England, by Age Group



Net Migration in New England, by State: 2010-2016



Total Number of Foreign Students, by State: 2012-2017



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

Rank	Place of Origin	% Total
1	China	36.03%
2	India	18.48%
3	Canada	6.97%

Total Number of Public and Private 2- and 4-Year Colleges and Universities in New England: 2004-05 to 2016-17



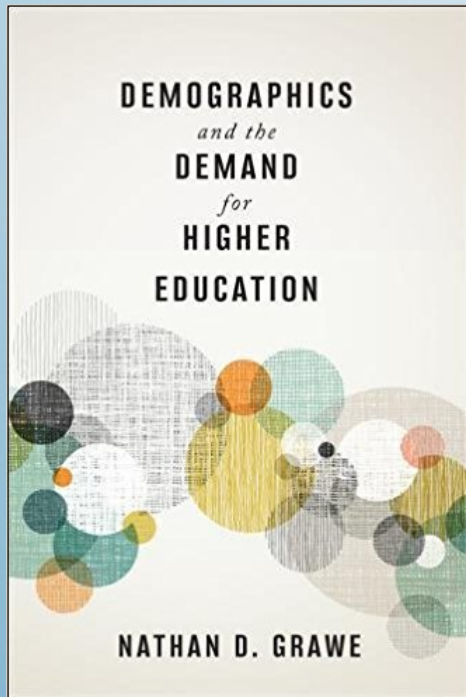
-7.33%

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

19

Number of fewer postsecondary institutions in New England since 2004-05 due to closure or merger

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.

Sector	Projections
2-Year Institutions	<ul style="list-style-type: none">• 2% national increase through 2025, followed by sharp decline• 13% decrease by 2029• 15%+ decline in New England
4-Year Institutions	<ul style="list-style-type: none">• Modest (2%) growth until 2025, then steep decline• 2025-2029: projected loss of 280,000 students nationally• New England net decline of 25%
Overall	<ul style="list-style-type: none">• Population growth shifting to Southwest, especially Hispanic population• 2025-2030: college-going population shrinking by 450,000

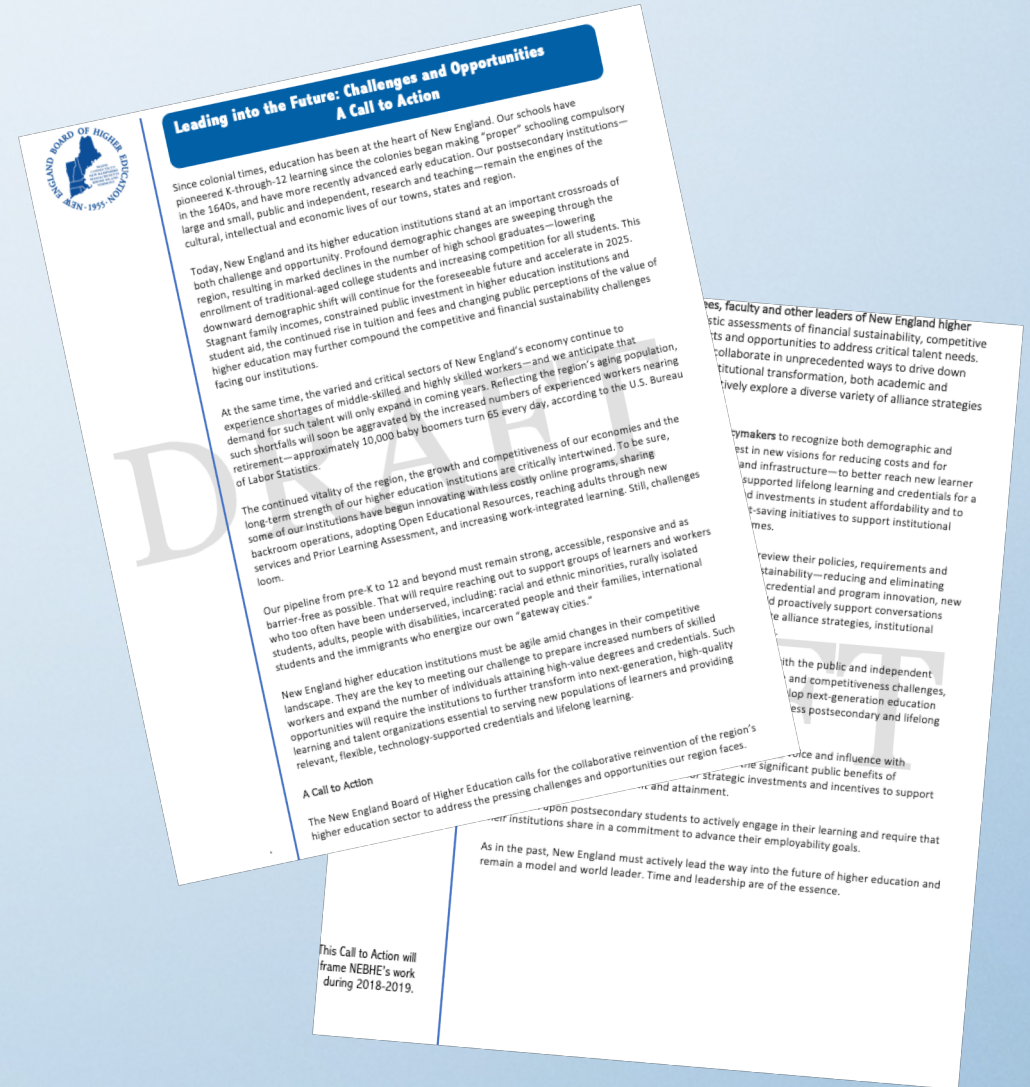
Small Group Activity

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!



NEACRAO

New England Association of Collegiate
Registrars & Admissions Officers