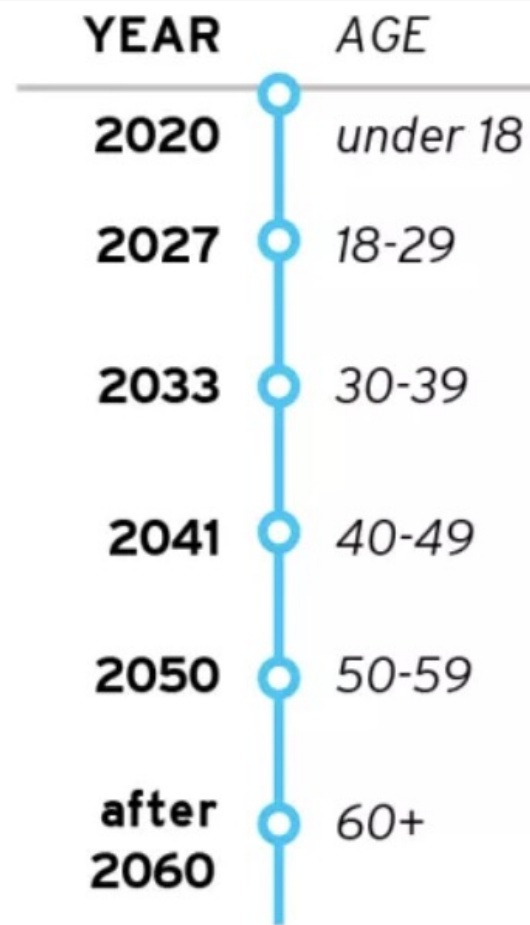


Demographics, Demand for Higher Ed, & Facilities Planning

Nathan D. Grawe | *Carleton College*

The views presented are solely those of the author and do not represent those of Carleton College



Source: William H Frey analysis of U.S. Census population projections released March 13, 2018 and revised September 6, 2018

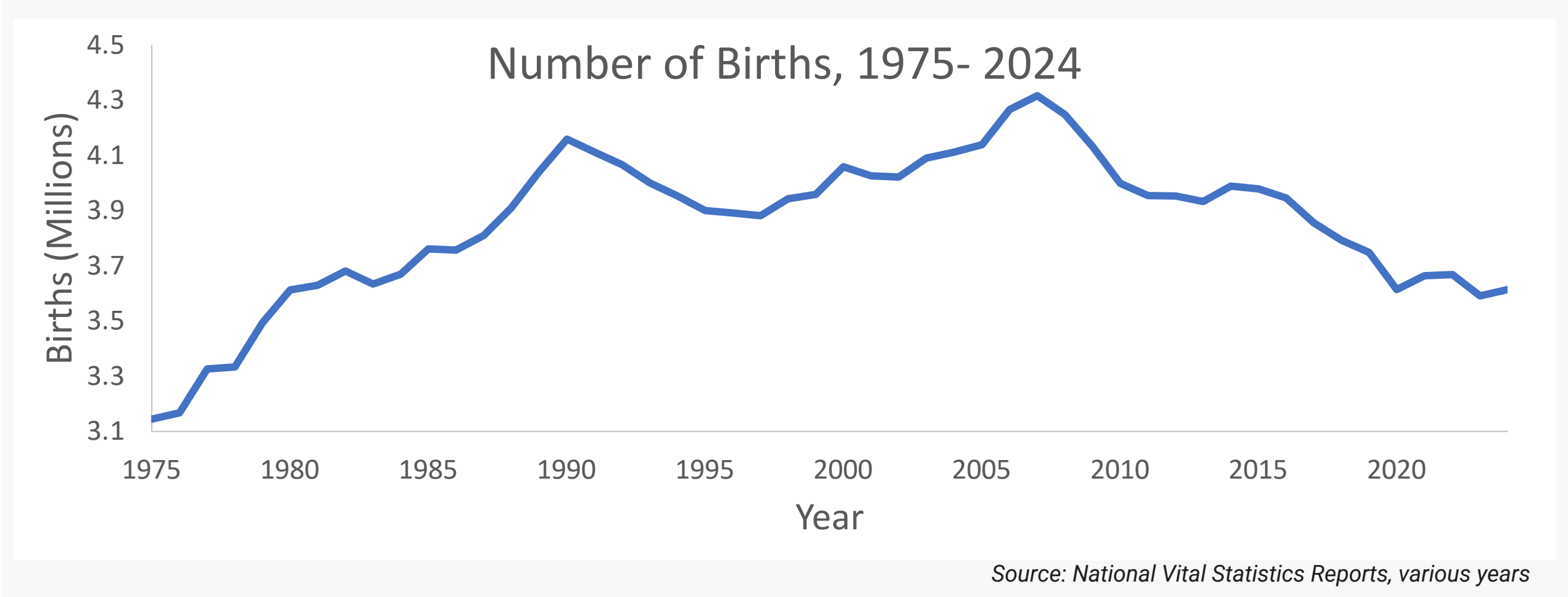
B Metropolitan Policy Program
at BROOKINGS

Year When Non-Hispanic Whites Become Minority

- Tipping-point year around mid-century
- Younger generations are more diverse
- Those under 18 have already passed tipping-point year
- Those of traditional college-going age reach tipping point in next decade.

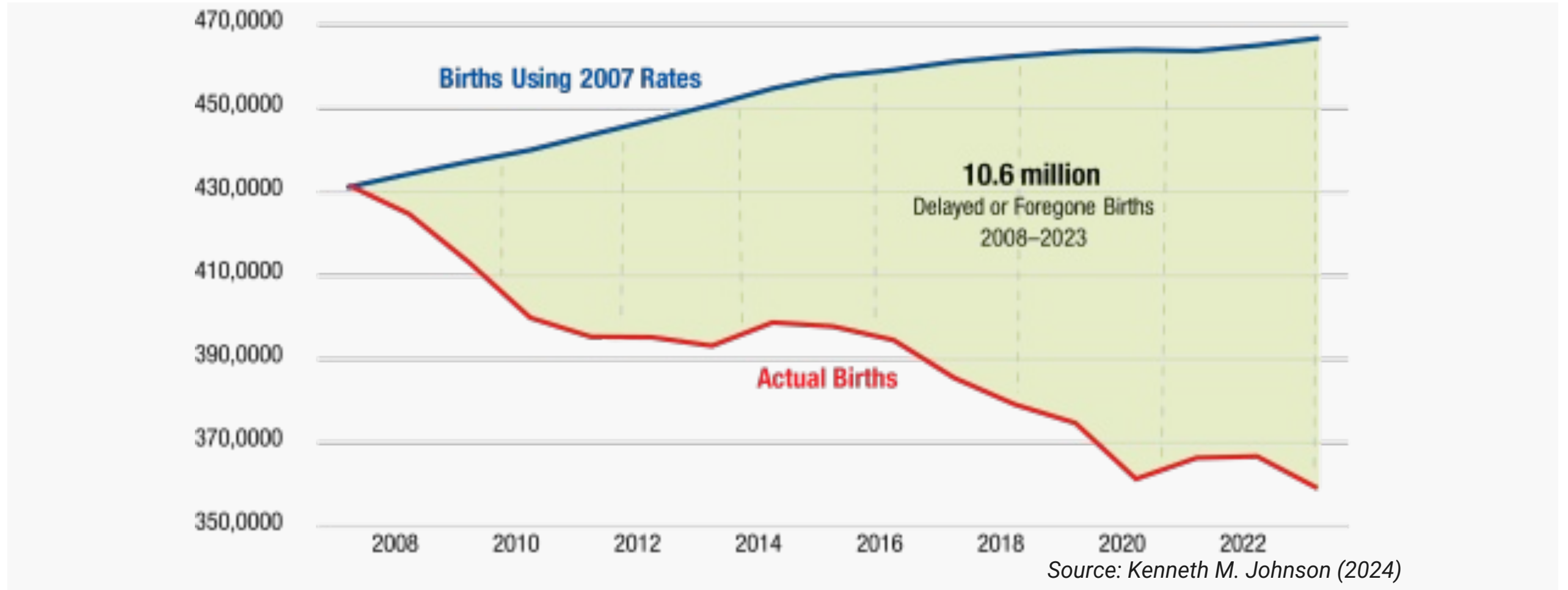
A History of US Births

Levels not seen since 1980.



Consequence of Fertility Decline

Cumulative total: 9.6 million delayed or foregone births

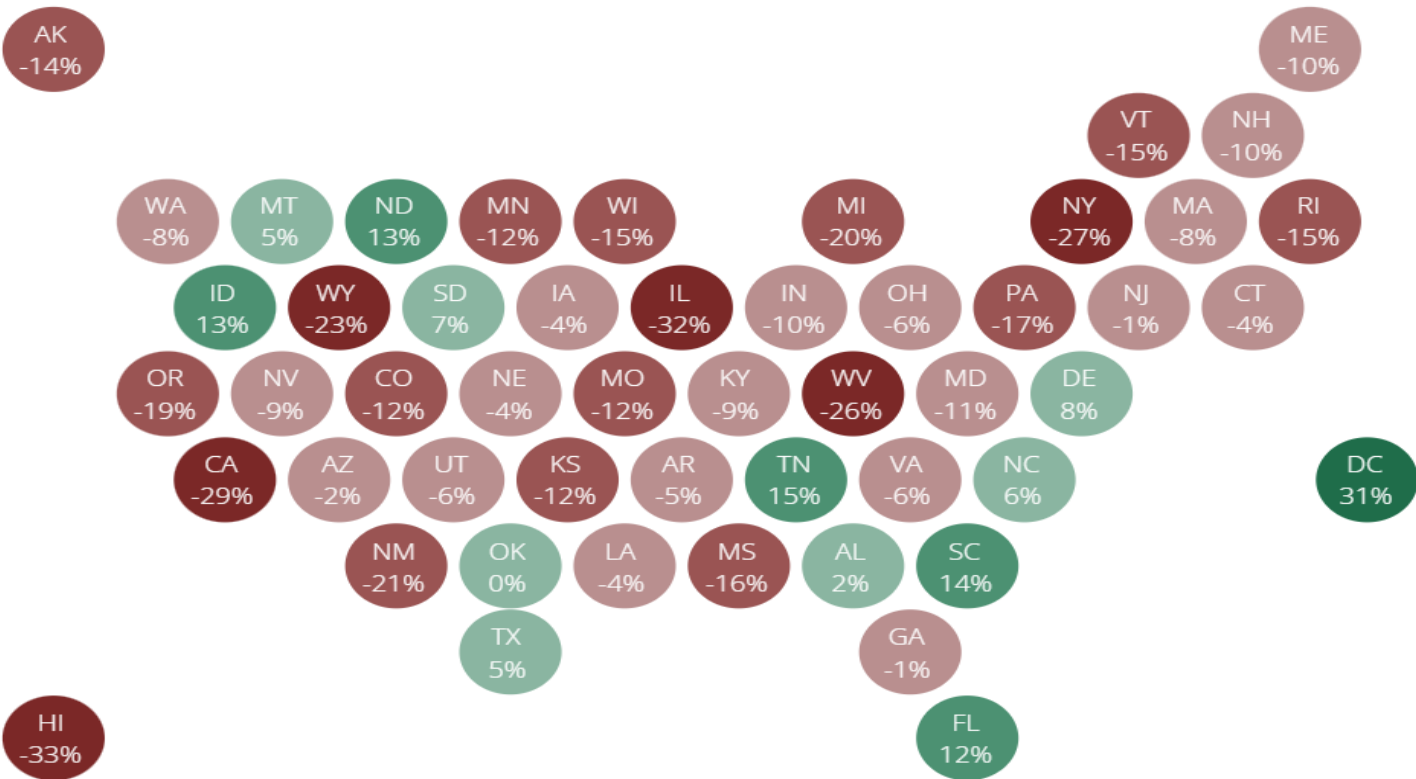


Declining Traditional-Age Market for Higher Education

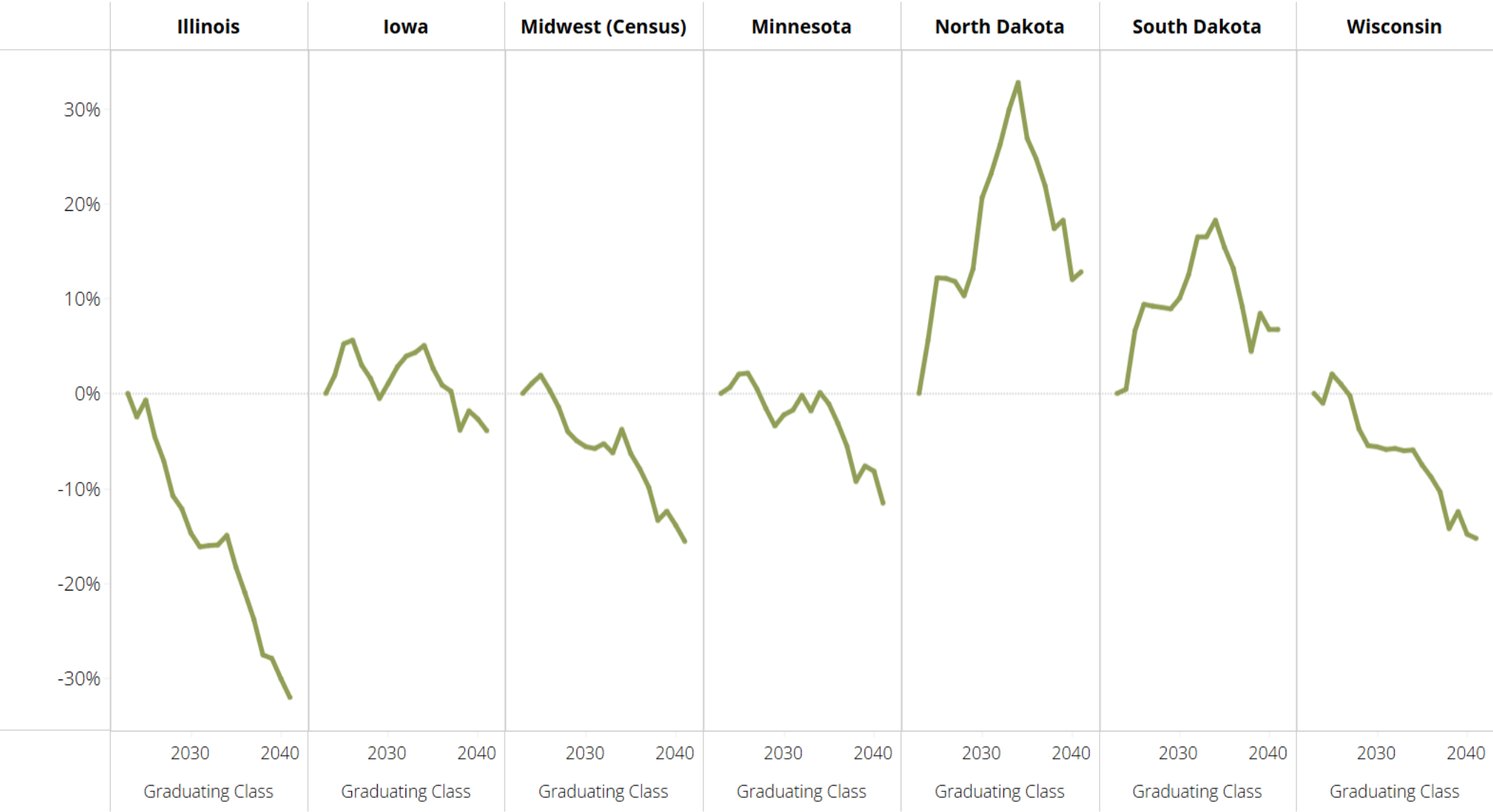
National Change 2023 to 2041: Down 10%

Projected percent change, 2023 to 2041

Select a state on the map to highlight on the bar chart and add to the line below



Percent change in the number of high school graduates by population from 2023



Western Interstate Commission for Higher Education. (2024). *Knocking at the College Door*. www.wiche.edu/knocking
See the notes page for more information.



Data Notes



Exporting Our Future

Minnesota Sends More Students Away Than It Attracts

Share of State's HS Grads Who Study in Home State

National Average: 78%

Weighted Average of MN & surrounding states: 73%

MN: 63%

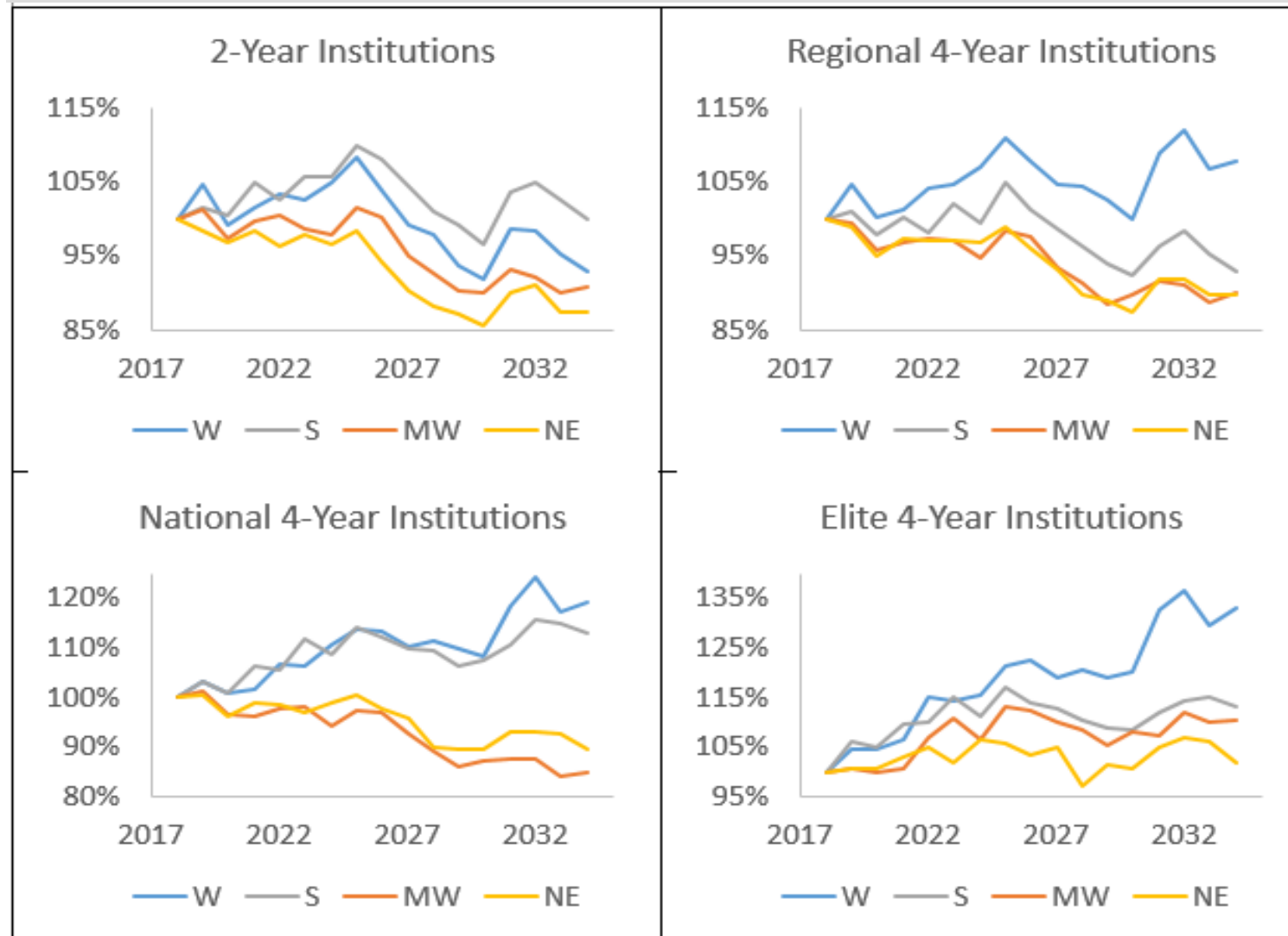
Net Migration Relative to HS Grads

Weighted Average of MN & surrounding states: +8%

MN: -18% (7,400 students)*

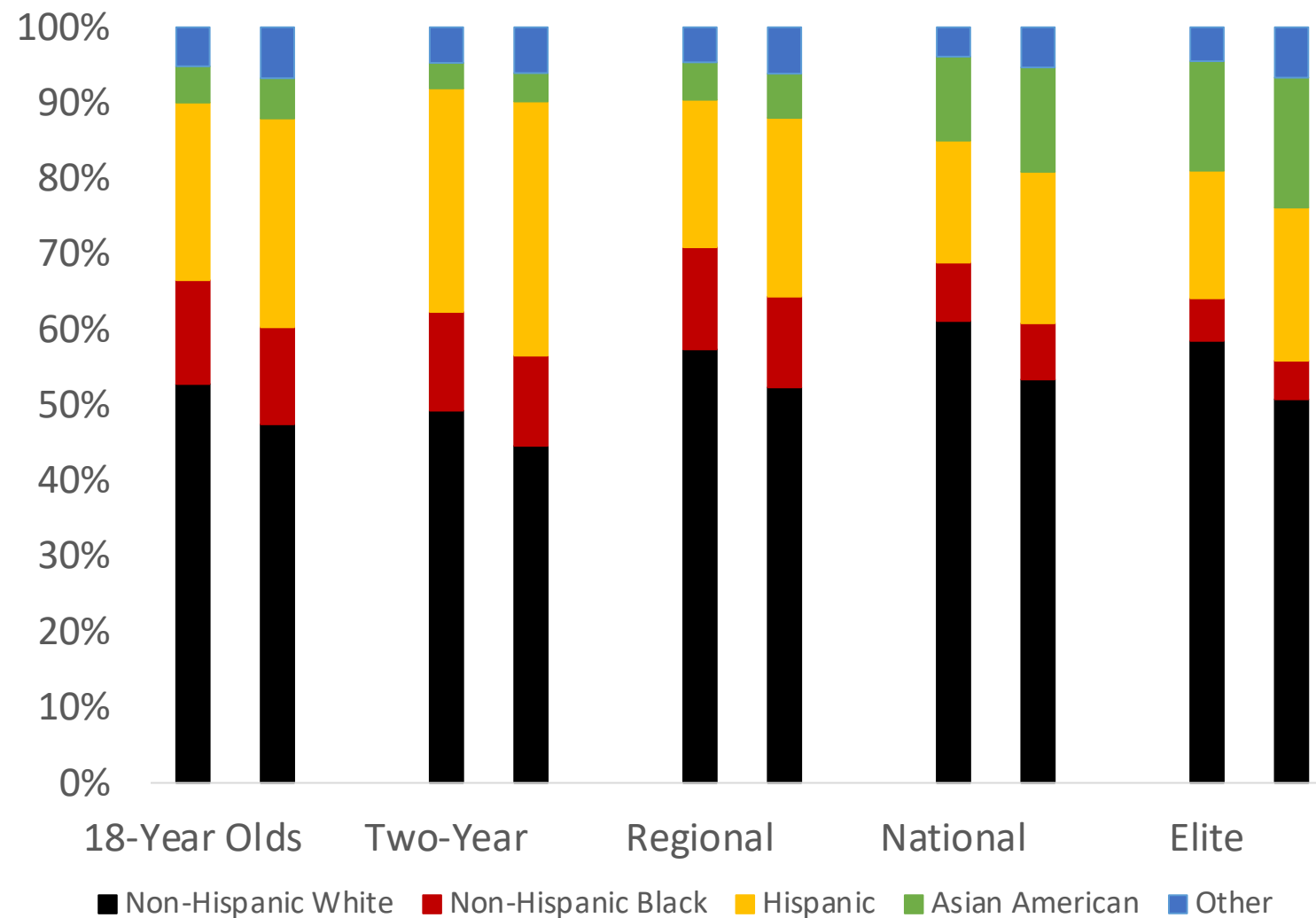
***Net 0 migration would eliminate ~80% of WICHE projected decline**

Projected Number of College-Going Students Relative to 2018, by Region



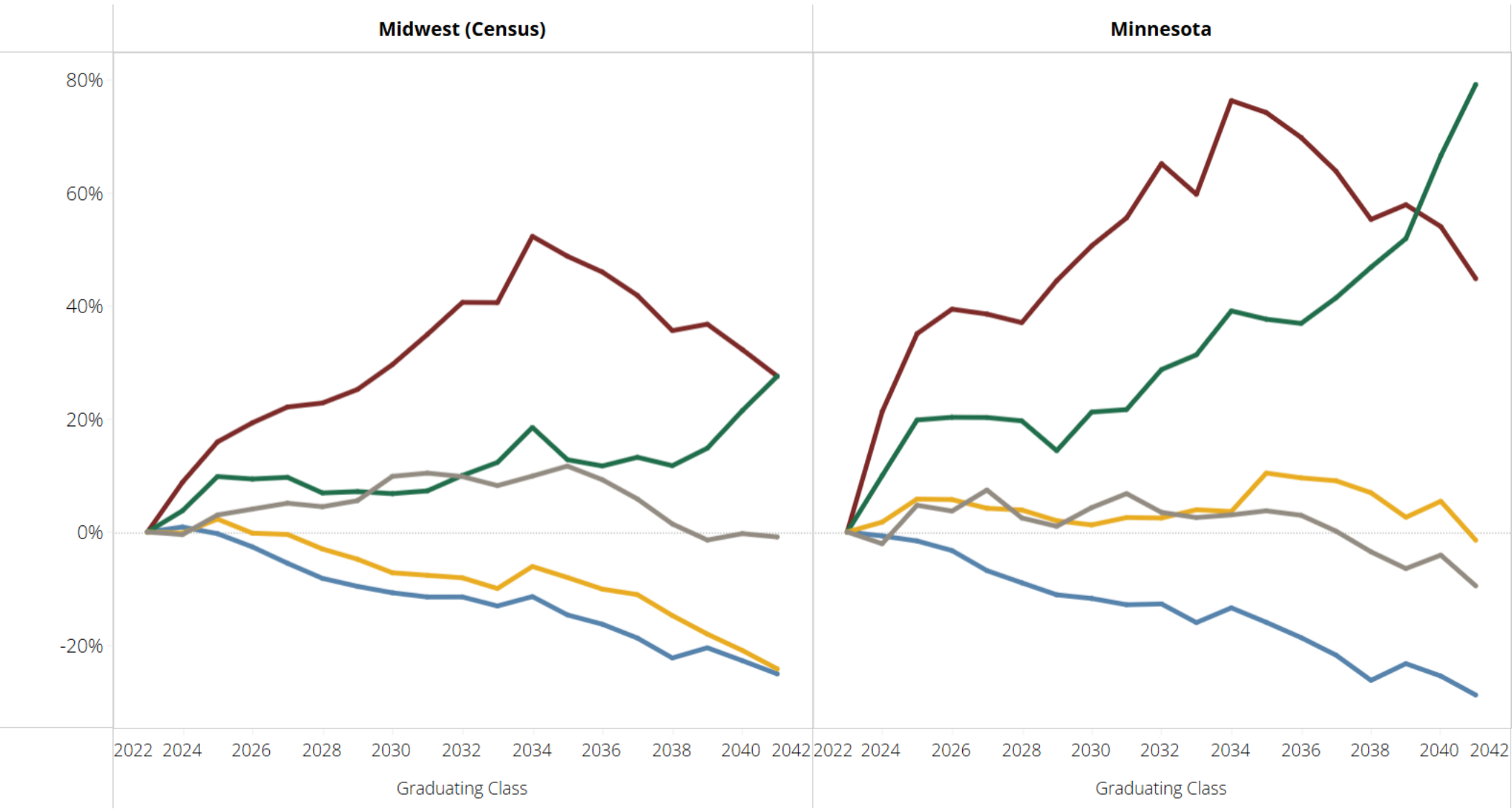
Source: Author's calculations based on data from the American Community Survey (2017), Centers for Disease Control and Prevention National Vital Statistics Reports (2018, 67(7)), 2009 High School Longitudinal Study (restricted and unrestricted), and the Panel Study of Income Dynamics (2011; 2015)

Race/Ethnicity Distribution of College-Going Students, 2018/19 and 2033/34



Source: Author's calculations based on data from the American Community Survey (2017), Centers for Disease Control and Prevention National Vital Statistics Reports (2018, 67(7)), 2009 High School Longitudinal Study (restricted and unrestricted), and the Panel Study of Income Dynamics (2011; 2015)

Percent change in the number of high school graduates by population from 2023



Western Interstate Commission for Higher Education. (2024). *Knocking at the College Door*. www.wiche.edu/knocking
See the notes page for more information.



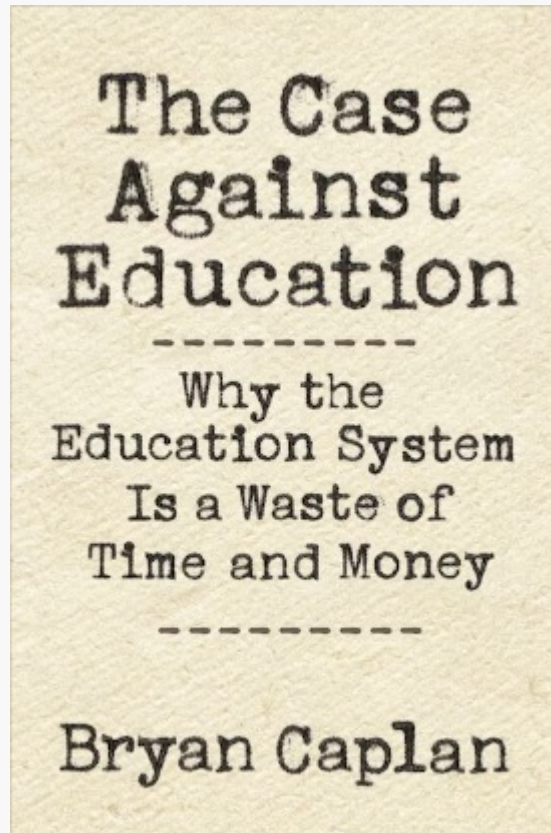
Data Notes



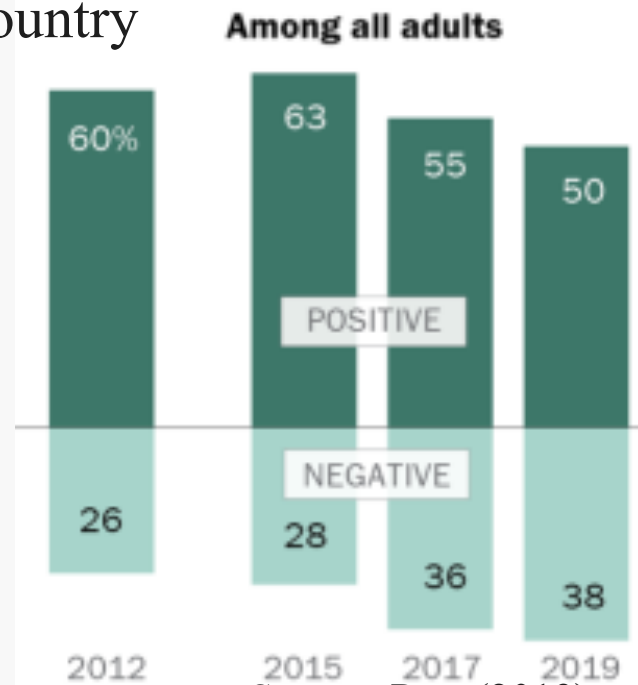
Challenges Leading Up to Contraction

Cultural Trends

Evidence of higher ed's exceptional ROI is questioned



Share of Americans saying colleges and universities have a ____ effect on the way things are going in the country

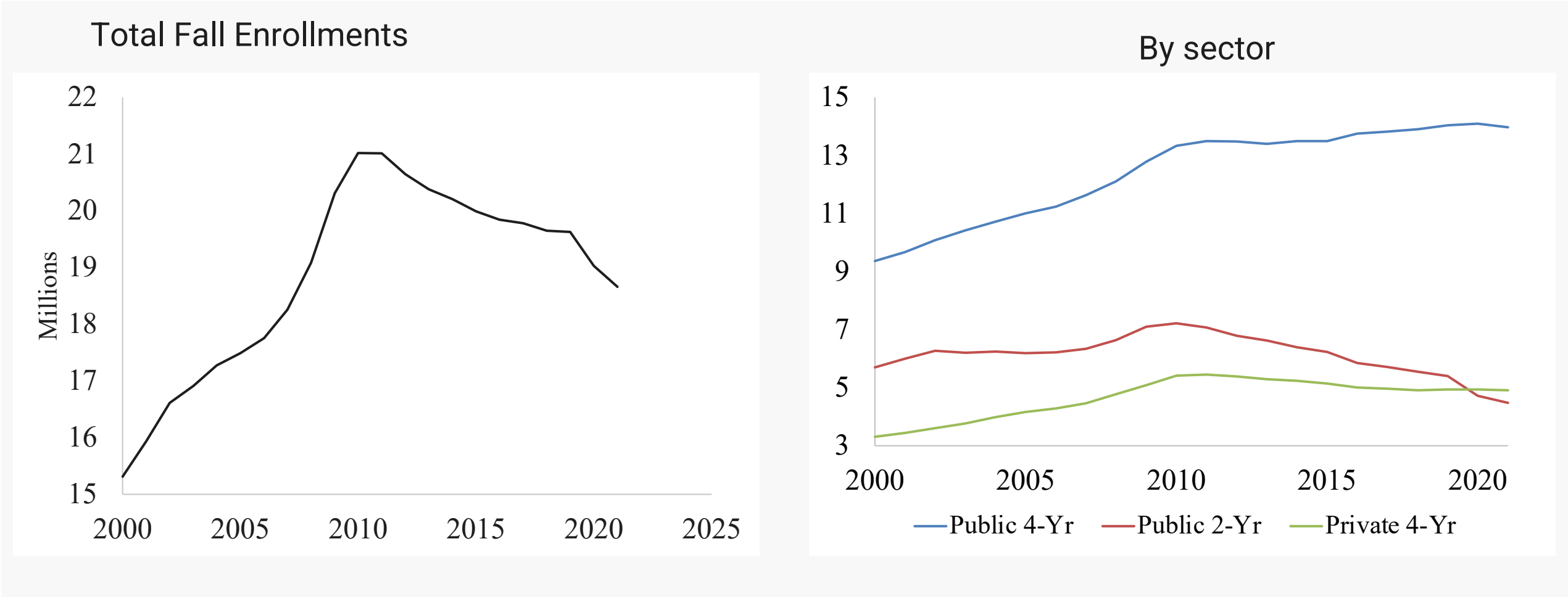


Source: Pew (2019)



Consequences for Higher Education

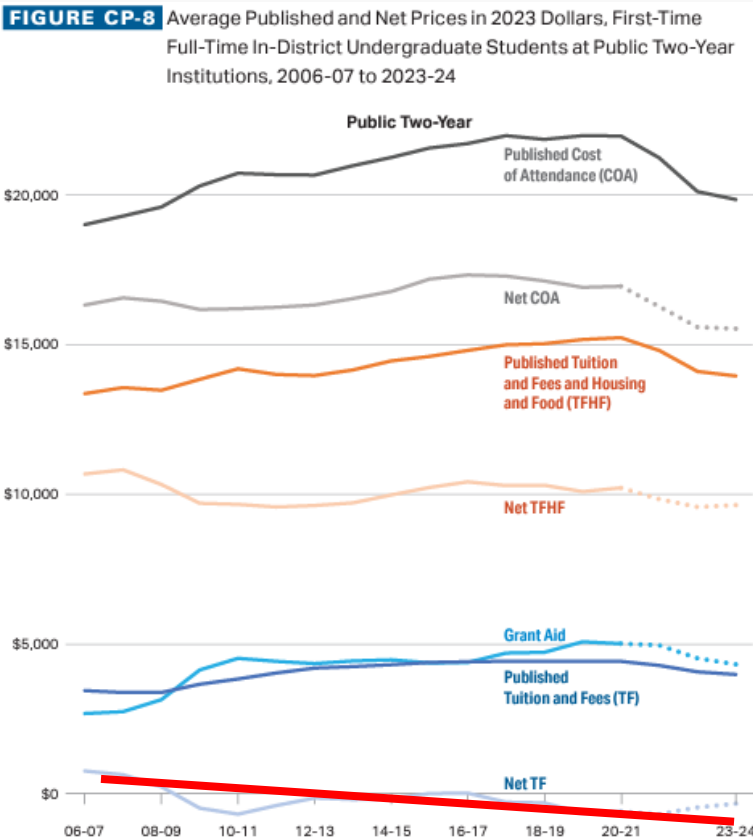
New era in enrollment



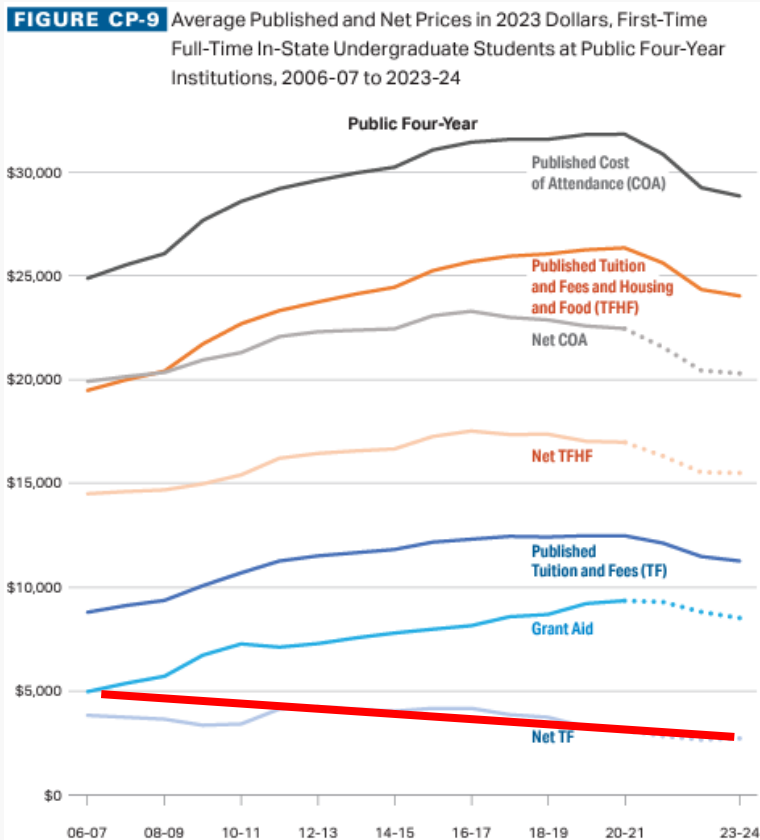
Consequences to Others in Higher Education

Stagnant net fee income, 2006-07 to 2023-24

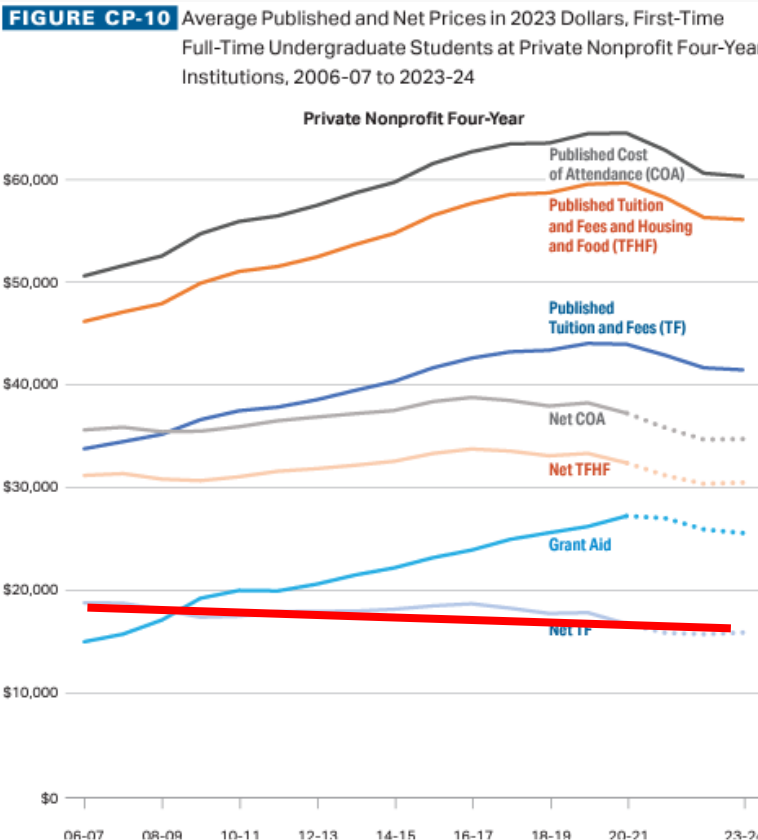
Public Two-Year



Public Four-Year



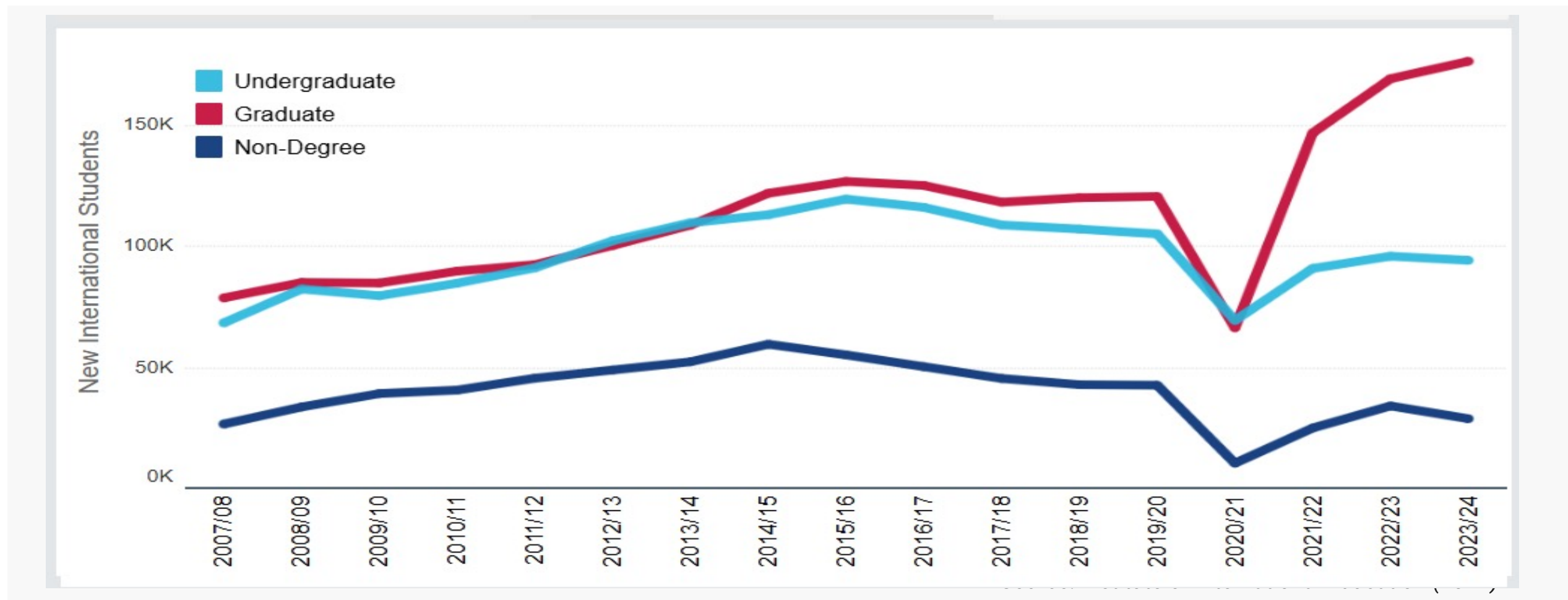
Private Four-Year



Higher Education Responds

New International Student Enrollments

Evidence of increased competition



Preparing for a Turn to New Student Groups



Pam Eddinger
President, Bunker Hill
Community College

“Unless we have had professional development along the way that invites us to think about equity work, a lot of educators are caught within the questions ‘Why aren’t you bringing me the right students? What is wrong with students today?’... Unless you are deeply reflective institutionally, you don’t go to question [ingrained practices].”

College Recruitment Reality

Challenging arithmetic

Currently

Population = p

HS graduation rate = g

Matriculation rate = 62%

Enrollments $E = 0.62 * p * g$

Possible Future

Population = $0.83p$

HS graduation rate = g

Matriculation rate = m
increases sufficiently to
maintain enrollment

?

Solution

$$m = \frac{1}{0.83} * 0.62 = 0.75$$

Attention to Student Success



CSUDH

MALE SUCCESS ALLIANCE



THE STATE UNIVERSITY OF NEW JERSEY
RUTGERS

Academic Programming



Collaboration

System collaboration



THE COUNCIL OF
INDEPENDENT COLLEGES



THE **TEAGLE**
FOUNDATION

N O R T H C A R O L I N A
I N D E P E N D E N T
C O L L E G E S & U N I V E R S I T I E S

Better, Not Bigger

Deliberate reduction in size

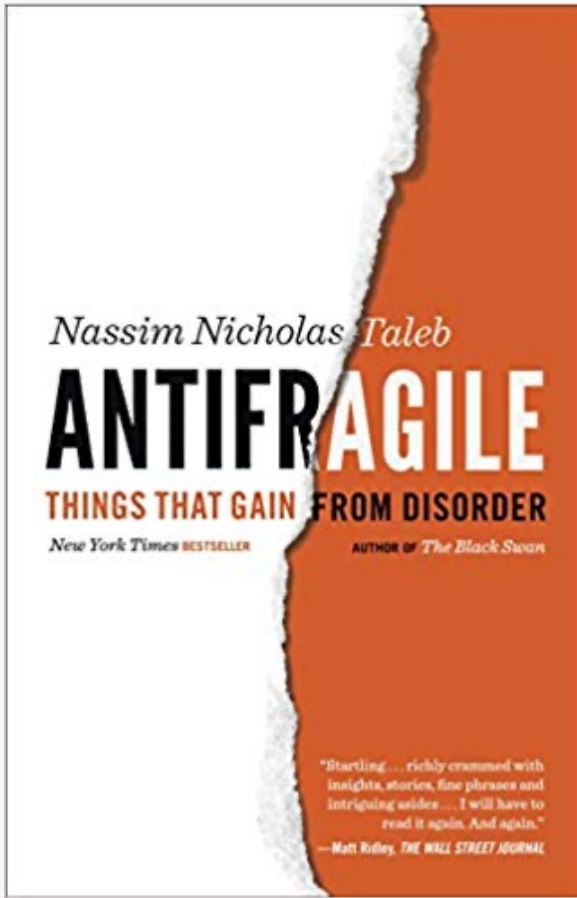


Facilities Connections

A World with Fewer Students

- Budgetary challenge of many fixed costs of facilities & facilities staff Less demand for dorms
- Higher perceived risk -> higher interest rates for debt-financed projects
- Less demand for dorms
- New approach to deferred maintenance?
- Increased occasions to moth-ball?

A Constructive Metaphor



“Antifragility is beyond resilience or robustness. The resilient resists shocks and stays the same; the antifragile gets better.”

Thank You

Nathan D. Grawe | *Carleton College*

Data Sources

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- U.S. Department of Education, National Center for Education Statistics, High School Longitudinal Study of 2009 (HSLs:09), "First Follow-up, 2009."
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