NOEL-LEVITZ WHITE PAPER

Back to the Present: Strategic Enrollment Planning for the Coming Demographic Change

Does your campus's enrollment success depend on traditional-age students? Do you draw from one of the 39 states plus District of Columbia that will soon see significant changes in the numbers and make-up of direct-from-high-school students? Is your campus ready for these changes?

Campus administrators are regularly reminded to keep an eye on long-range demographic projections when planning for the future; that's only prudent when making decisions about policies and facilities that may be developed over a period of several years, most would agree. But currently, institutions of higher education—most notably the large group of four-year private and public colleges and universities that rely on traditional-age students—are well-advised to drop the binoculars and take a close look at the next five-to-ten-year span. What lies directly ahead is a demographic trough more pronounced than any experienced in recent decades—and one that urges strategic enrollment planning to position institutions for stability and success.

The most critical demographic factors that will affect colleges in all but 11 states in the next five years are an impending decline in the number of high school graduates and decreasing numbers of students in the ethnic groups with the highest college-going rates—Caucasians and Asian-Americans.¹ In addition, the racial-ethnic mix of high school graduates will change dramatically. While studies such as the NCES Digest of Education Statistics predict modest enrollment growth from 2009 to 2018, they frequently overlook the fact that the growth experienced by many states from 2007 to 2010 will be followed by a steady, nearly nationwide decline through 2014-15, after which some—but not all—states will experience a measure of recovery. Given this reality, institutions must be keenly aware of shorter-term projections for their primary recruitment areas and take actions to prepare themselves for the upcoming roller coaster ride in the number of traditional-aged students.



Noel-Levitz

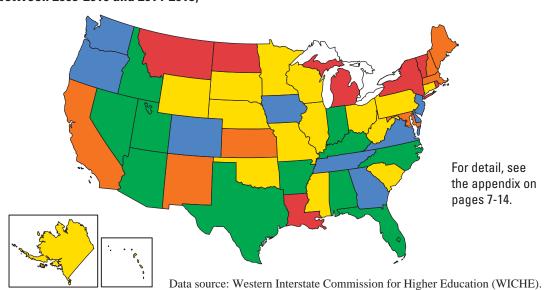


Nationally, the total number of high school graduates will be in a gradual decline through 2014-15, as will the total number of Asian and Caucasian high school graduates, the two highest college-going groups by ethnicity.

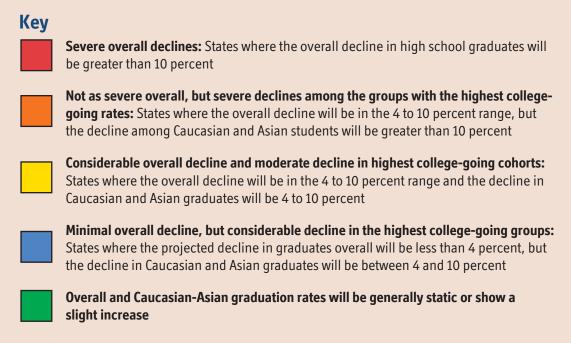
Areas of change

Based on the latest available data,² the map below shows U.S. states grouped in five categories to illustrate the severity of the upcoming demographic impact. The five categories include changes among Caucasian and Asian-American graduates because studies have shown that these students have significantly higher college-going rates and are more mobile in making their college choices than other ethnic groups.

Projected change in the number of high school graduates over the next five years (between 2009-2010 and 2014-2015)



(2008). Knocking at the college door – Projections of high school graduates by state and race/ethnicity 1992-2022. Boulder, CO: Author. Retrieved from http://www.wiche.edu/knocking



Additional factors: graduation rates, migration patterns, the economy

The impending widespread declines in high school graduates may catch some enrollment planners off guard because these decreases follow in the wake of largely positive demographic trends in high school graduation rates and college enrollments in recent decades. U.S. Census Bureau figures indicate that, in October 2008, nearly 85 percent of 18- to 24-year-olds had completed high school—an all-time high—and more youths than ever before were eligible to attend college. At that time, 39.6 percent of 18- to 24-year-olds were enrolled in either a two- or four-year college, a 15.6 percent increase from the 24 percent enrolled in 1973. Enrollments have been rising steadily at both two-and four-year colleges for several decades, although the most recent spike occurred almost entirely at two-year colleges.⁴

However, this overall growth pattern is about to change, as indicated on the preceding page, with the result that nationally the total number of high school graduates will be in a gradual decline through 2014-15. The number of high school graduates will shift somewhat around the country, creating modest declines in some states or regions, increases in others, and a veritable roller coaster ride in some areas. Therefore it's important that state-to-state migration patterns, as well as the varying numbers of graduates in college-going ethnic groups, be factored into enrollment planning.

Institutions likely to be most affected by demographic declines are four-year, non-elite private colleges that rely primarily on traditional-aged students from in-state markets. In the past, these institutions have often created growth strategies based on moving beyond state borders to regional and even targeted national markets in high-population areas. Unfortunately, given demographic projections indicating declines in high school graduates across the nation during the next five years and the fact that more than 50 percent of first-year students choose a college within 100 miles of home,⁵ out-of-state recruitment efforts may yield little.

The fluctuating state of the U.S. economy will also continue to have a major impact on enrollment patterns at various types of institutions, underscoring the need to blend economic data with demographic projections, with these general considerations in mind:

- Four-year public institutions may have a price advantage over their private counterparts during a
 weak economy, but will also be impacted by the marked demographic declines described above
 and contractions in state support. As a result of declines in state support, a number of four-year
 publics are increasing their class sizes and are increasing out-of-state recruitment efforts. On
 the other hand, four-year public institutions are losing increasing numbers of location-bound or
 lowest-cost-seeking students to community colleges.
- Many four-year, non-elite private institutions will continue to struggle until the economy and the
 job market return to pre-recession conditions. Likely increases in public institution class sizes and
 declining numbers of high school graduates will make this an even greater challenge for non-elite
 private schools and cause this cohort to be the most vulnerable for at least the next five years.
 This is a critical time for private schools to conduct strategic enrollment planning, including price
 sensitivity studies.
- Two-year colleges will continue to gain ground during uncertain economic times, encouraged by federal support during the current administration. It will be critical for these institutions, however, to focus on student success and completion rates amid the growth.
- Proprietary schools, with their flexible products and delivery methods, will likely continue to grow in market share assuming the regulatory environment surrounding federal aid programs does not constrict student access to these institutions.

In addition to the changes highlighted on the map, it's important to keep an eye on other factors that will influence college enrollments, such as high school graduation rates, student migration patterns, and the economy, as well as changes in family income levels and collegegoing rates by ethnicity.

For state-by-state projections over the next five and ten years, please see the appendix on pages 7-14.

Enrollments of students 25 years or older are projected to increase significantly between 2010 and 2014 and beyond.

Changes in the age and racial-ethnic mix of students

Another important consideration is the rising average age of college students as people return to college again and again to acquire new knowledge, advance their careers, or move in new career directions. As shown below, 38 percent of all students enrolled in U.S. higher education in 2010 are projected to be 25 or older. Perhaps more startling, the students in this age group are projected to enroll in higher education at increasingly higher rates in the years ahead, as shown here and as reported in the NCES Condition of Education Report.⁶ In general, enrollment rates among adult students are expected to rise and fall inversely to the overall economy.

Total fall-term enrollment in degree-granting institutions by student age: (Selected years, 1990 through 2018—presented in thousands)

Age	1990	1995	2000	2005	2007	2010*	2014*	2018*
Total	13,819	14,262	15,312	17,487	18,248	19,126	19,928	20,620
14 to 17 years old	177	148	145	199	179	144	143	161
18 to 19 years old	2,950	2,894	3,531	3,610	3,978	4,122	4,051	4,175
20 to 21 years old	2,761	2,705	3,045	3,778	3,761	4,117	4,150	4,128
22 to 24 years old	2,144	2,411	2,617	3,072	3,362	3,469	3,810	3,820
25 to 29 years old	1,982	2,120	1,960	2,384	2,522	2,674	2,863	3,097
30 to 34 years old	1,322	1,236	1,265	1,354	1,428	1,559	1,754	1,856
35 years old and over	2,484	2,747	2,749	3,090	3,017	3,041	3,156	3,383

*Projected figures.

Data source: U.S. Department of Education Institute of Education Sciences (IES) National Center for Education Statistics. (2010). Digest of education statistics. Washington, D.C.: Author. Retrieved from http://nces.ed.gov/programs/digest/

Family income levels must be carefully monitored, because enrollment rates decline for each level of income along the spectrum of family earnings. It can't be overemphasized that the racial-ethnic mix of graduates from public high schools will also change dramatically over the next decade. The number of white non-Hispanic and black non-Hispanic graduates is projected to decrease nearly every year, while the numbers of Hispanic graduates will increase (see appendix, pages 13-14). Hispanic students, however, generally have more family income constraints than those who comprised the largest and highest college-growing groups in the past.⁷ A key statistic related to this is the fact that 87 percent of high school graduates from families in the top quartile of family income (earning more than \$100,000) enroll in college; enrollment rates decline for each level of income along the rest of the spectrum of family earnings.⁸ Many high school graduates in the growing ethnic groups will come from families that are at the lower end of the income scale, making it less likely that they will pursue higher education—especially at private colleges.

In addition to financial concerns of incoming students, college leaders will also want to consider the academic preparedness of this new mix of students. Many students enter college without the basic skills that they will need to be successful. Researchers have found that more than one-third of students are in need of remedial courses, with this percentage even higher among growing student populations, including both Hispanic and adult learners.⁹

Crafting a strategic response

Clearly, traditional four-year institutions located in states that fall into one of the four categories of demographic decline described in this paper should be engaged in strategic enrollment planning that will align the institution with its environment in order to ensure continued stability and quality. In most cases, this will mean creating a plan that will accomplish one or more of the following:

- Increase market share of traditional-aged students in the primary market area.
- Increase retention and graduation rates among current students.
- Create new markets of non-traditional students (keeping in mind that the adult population is increasing).
- Create new markets of students from other states (keeping in mind that numbers may be decreasing there as well).
- Influence the college-going rate so it increases.
- Downsize in a strategic way to guarantee survival and stability.

Faced with current challenges, institutions have a wide array of possibilities for repositioning themselves to adapt to the changing demographic landscape—as long as they are willing to earnestly revisit their mission, markets, and programming. Examples of approaches include the following:

- Develop a more Hispanic-friendly product and marketing approach.
- Reach out to non-traditional-aged students with expanded delivery options such as off-site and online programs.
- Strengthen retention efforts through early-alert, intervention, and advising strategies focused on increasing degree completion.
- Conduct pricing research and make appropriate tuition and aid adjustments.
- Align academic programs and support services necessary to match current demographic interests.

Regardless of the direction chosen, it's essential that the strategic enrollment planning process be information-based and ongoing, effectively addressing: an institution's mission, vision, goals, and capabilities; the ways the institution serves its students, currently and in the future; and the changing marketplace and environment.

This is a complex and comprehensive process that should be facilitated by individuals with strong background and previous successes with strategic enrollment planning and requires strong partnership with academic affairs. The strategic plan needs to be well grounded in environmental data, institutional data, enrollment best practices, pricing and financial aid investment, return on investment, and support at the very highest levels.

Now is the time to strategize, organize, mobilize

Sometimes, it's possible to be too far-sighted or overly committed to a long-range plan that was fashioned in a vastly different environment. A small liberal arts college breaking ground for a new residence hall while on the verge of a sharp decline among high school graduates in its primary market may be faithful to its long-term vision, but heedless of its more immediate challenges. Colleges today confront a potentially threatening vortex of profound demographic change, rapidly changing economic and workforce demands, and the need to provide access and promote achievement among previously under-served populations. But opportunity and success lie ahead for those who are able to face the situation squarely and navigate these waters with a strategic enrollment plan that effectively connects mission, capabilities, and a changing environment to long-term enrollment and fiscal health.

Faced with current challenges, institutions have a wide array of possibilities for repositioning themselves to adapt to the changing demographic landscape.

Citations

- 1 Western Interstate Commission for Higher Education (WICHE). (2008). Knocking at the college door—Projections of high school graduates by state and race/ethnicity 1992-2022. Boulder, CO: Author. Retrieved from http://www.wiche.edu/knocking
- 2 Ibid.
- 3 U.S. Census Bureau. (2009). School enrollment in the United States. Washington, D.C.: Author. Retrieved from http://www.census.gov/population/www/socdemo/school.html
- 4 Noel-Levitz. (2009). Fall 2009 census data: New student enrollment and retention at four-year and two-year institutions. Coralville, IA: Author. Retrieved from www.noellevitz.com/censusdatafall2009
- 5 Higher Education Research Institute. (2010). The American freshman: National norms fall 2009. Los Angeles, CA: Author. Retrieved from http://chronicle.com/article/This-Years-Freshmen-at-4-Year/63672/
- 6 U.S. Department of Education Institute of Education Sciences (IES) National Center for Education Statistics. (2010). The condition of education. Washington, D.C.: Author. Retrieved from http://nces.ed.gov/programs/coe/
- 7 U.S. Census Bureau (2010). Economic characteristics of households in the United States: Third quarter 2008. Washington, D.C.: Author. Retrieved from http://www.census.gov/prod/2010pubs/p70-119.pdf
- 8 Postsecondary Education Opportunity. (2009). Family income and educational attainment 1970 to 2008. Oskaloosa, Iowa: Author. Retrieved from http://www.postsecondary.org
- 9 Killough, A.C. (2009, June 11). Obama administration joins efforts to fix remedial education. The Chronicle of Higher Education. Retrieved from http://chronicle.com

Other references

Pew Research Center. (2009). College enrollment hits all-time high, fueled by community college surge. Washington, D.C.: Author. Retrieved from http://pewsocialtrends.org

U.S. Bureau of Labor Statistics. (2010). College enrollment and work activity of 2009 high school graduates. Washington, D.C.: Author. Retrieved from http://www.bls.gov/news.release/hsgec.nr0.htm

U.S. Department of Education Institute of Education Sciences (IES) National Center for Education Statistics. (2010). Digest of education statistics. Washington, D.C.: Author. Retrieved from http://nces.ed.gov/programs/digest/

U.S. Department of Education Institute of Education Sciences (IES) National Center for Education Statistics. (2010). Status and trends in the education of racial and ethnic minorities. Washington, D.C.: Author. Retrieved from http://nces.ed.gov/programs/coe/

Hahn, R.D., & Price, D. (2008). Promise lost: College-qualified students who don't enroll in college. Retrieved from http://www.ihep.org/Publications/publications-detail.cfm?id=117

Sign up to receive additional information updates from Noel-Levitz by e-mail at www.noellevitz.com/Subscribe.

Appendix with state-by-state projections

The five tables on the following pages are color-coded by the severity of the demographic changes projected by 2014-15. **Boldfaced figures in Tables 1 and 2** indicate the most severe changes and were used to establish a consistent order of states for all five tables. The source of the data is WICHE, the Western Interstate Commission on Higher Education, as noted at the bottom of this page.

Index		
Table 1:	All High School Graduates	Page 8
Table 2:	White and Asian Public High School Graduates	Page 9
Table 3:	White Public High School Graduates	Page 10
Table 4:	Asian Public High School Graduates	Page 12
Table 5:	Hispanic Public High School Graduates	Page 13
Table 5.	Thispanic Fubile High School Graduates	1 age 13

Detailed, state-by-state projections on the following pages are republished with permission from WICHE, the Western Interstate Commission on Higher Education.

Severe overall declines: States where the overall decline in high school graduates will be greater than 10 percent Not as severe overall, but severe declines among the groups with the highest collegegoing rates: States where the overall decline will be in the 4 to 10 percent range, but the decline among Caucasian and Asian students will be greater than 10 percent Considerable overall decline and moderate decline in highest college-going cohorts: States where the overall decline will be in the 4 to 10 percent range and the decline in Caucasian and Asian graduates will be 4 to 10 percent Minimal overall decline, but considerable decline in the highest college-going groups: States where the projected decline in graduates overall will be less than 4 percent, but the decline in Caucasian and Asian graduates will be between 4 and 10 percent Overall and Caucasian-Asian graduation rates will be generally static or show a slight increase

The source of data

The data source for all five tables in this section is the following study: Western Interstate Commission for Higher Education (WICHE). (2008). Knocking at the college door — Projections of high school graduates by state and race/ethnicity 1992-2022. Boulder, CO: Author. Retrieved from http://www.wiche.edu/knocking

Table 1: All		Fiv	ve-Year Chang	jes	Te	n-Year Chang	jes
High School Graduates	Academic Year 2009-10	Academic Year 2014-15	Changes	Percent Increase/ Decrease	Academic Year 2019-20	Changes	Percent Increase/ Decrease
United States total	3,310,631	3,189,364	-121,267	-3.7%	3,311,763	1,132	0.0%
District of Columbia	5,172	4,143	-1,029	-19.9%	3,931	-1,241	-24.0%
Louisiana	36,507	29,924	-6,583	-18.0%	29,173	-7,334	-20.1%
Vermont	7,857	6,536	-1,321	-16.8%	6,381	-1,476	-18.8%
New York	188,531	165,168	-23,363	-12.4%	160,185	-28,346	-15.0%
North Dakota	7,296	6,417	-879	-12.0%	6,172	-1,124	-15.4%
Rhode Island	12,444	11,140	-1,304	-10.5%	11,061	-1,383	-11.1%
Michigan	113,715	102,093	-11,622	-10.2%	99,816	-13,899	-12.2%
Montana	10,794	9,698	-1,096	-10.2%	9,978	-816	-7.6%
Maine	16,786	16,034	-752	-4.5%	15,503	-1,283	-7.6%
California	419,638	399,487	-20,151	-4.8%	401,760	-17,878	-4.3%
Massachusetts	71,320	64,703	-6,617	-9.3%	65,131	-6,189	-8.7%
Maryland	66,607	60,782	-5,825	-8.7%	61,846	-4,761	-7.1%
Kansas	31,020	28,796	-2,224	-7.2%	30,688	-332	-1.1%
New Mexico	19,239	18,412	-827	-4.3%	19,139	-100	-0.5%
New Hampshire	16,013	14,538	-1,475	-9.2%	14,628	-1,385	-8.6%
Pennsylvania	146,604	133,422	-13,182	-9.0%	132,618	-13,986	-9.5%
Mississippi	28,002	25,504	-2,498	-8.9%	25,542	-2,460	-8.8%
West Virginia	18,192	16,646	-1,546	-8.5%	16,825	-1,367	-7.5%
Ohio	134,595	123,460	-11,135	-8.3%	122,120	-12,475	-9.3%
Alaska	7,872	7,241	-631	-8.0%	7,224	-648	-8.2%
Connecticut	42,741	39,420	-3,321	-7.8%	38,444	-4,297	-10.1%
South Carolina	38,221	35,364	-2,857	-7.5%	37,097	-1,124	-2.9%
Missouri	70,136	64,921	-5,215	-7.4%	66,661	-3,475	-5.0%
Wyoming	5,316	4,950	-366	-6.9%	5,279	-37	-0.7%
Wisconsin	68,921	64,588	-4,333	-6.3%	66,697	-2,224	-3.2%
Illinois	146,084	137,482	-8,602	-5.9%	137,471	-8,613	-5.9%
Hawaii	13,837	13,114	-723	-5.2%	13,030	-807	-5.8%
South Dakota	8,677	8,228	-449	-5.2%	8,532	-145	-1.7%
Minnesota	62,911	59,695	-3,216	-5.1%	63,072	161	0.3%
Nebraska	22,091	21,001	-1,090	-4.9%	23,008	917	4.2%
Oklahoma	38,619	36,910	-1,709	-4.4%	39,053	434	1.1%
Oregon	34,458	33,434	-1,024	-3.0%	34,597	139	0.4%
Washington	69,519	67,457	-2,062	-3.0%	68,129	-1,390	-2.0%
lowa	38,155	36,814	-1,341	-3.5%	37,687	-468	-1.2%
Delaware	9,572	9,432	-140	-1.5%	10,133	561	5.9%
Virginia	87,513	84,362	-3,151	-3.6%	91,692	4,179	4.8%

Table 1: All High School Graduates continued

Colorado	50,548	50,397	-151	-0.3%	60,231	9,683	19.2%
Georgia	89,800	95,332	5,532	6.2%	107,190	17,390	19.4%
Tennessee	56,448	54,572	-1,876	-3.3%	56,918	470	0.8%
New Jersey	111,103	106,830	-4,273	-3.8%	108,347	-2,756	-2.5%
		_					
Kentucky	43,972	42,054	-1,918	-4.4%	42,935	-1,037	-2.4%
Alabama	47,187	46,178	-1,009	-2.1%	44,856	-2,331	-4.9%
Indiana	70,972	69,767	-1,205	-1.7%	71,010	38	0.1%
Arkansas	30,402	31,303	901	3.0%	32,421	2,019	6.6%
North Carolina	92,540	96,582	4,042	4.4%	105,883	13,343	14.4%
Idaho	17,839	18,882	1,043	5.8%	21,415	3,576	20.0%
Florida	174,924	185,030	10,106	5.8%	198,860	23,936	13.7%
Texas	280,802	301,783	20,981	7.5%	337,406	56,604	20.2%
Utah	35,038	37,980	2,942	8.4%	43,489	8,451	24.1%
Nevada	21,826	24,502	2,676	12.3%	29,537	7,711	35.3%
Arizona	81,853	92,865	11,012	13.5%	107,706	25,853	31.6%

Table 2: White and		Fiv	ve-Year Chang	es	Te	n-Year Chang	es
Asian Public High School Graduates	Academic Year 2009-10	Academic Year 2014-15	Changes	Percent Increase/ Decrease	Academic Year 2019-20	Changes	Percent Increase/ Decrease
United States total	1,990,500	1,842,574	-147,926	-7.4%	1,835,803	-154,697	-7.8%
District of Columbia	160	137	-23	-14.4%	189	29	18.1%
Louisiana	18,299	15,859	-2,440	-13.3%	15,534	-2,765	-15.1%
Vermont	6,178	5,271	-907	-14.7%	5,130	-1,048	-17.0%
New York	109,985	98,437	-11,548	-10.5%	95,150	-14,835	-13.5%
North Dakota	6,223	5,434	-789	-12.7%	5,152	-1,071	-17.2%
Rhode Island	7,613	6,395	-1,218	-16.0%	5,928	-1,685	-22.1%
Michigan	83,562	77,216	-6,346	-7.6%	75,568	-7,994	-9.6%
Montana	8,869	7,741	-1,128	-12.7%	7,831	-1,038	-11.7%
20.	10.010	10.005	4.004	40.70/	10.444	1.075	15.00/
Maine	12,319	10,635	-1,684	-13.7%	10,444	-1,875	-15.2%
California	182,885	159,374	-23,511	-12.9%	158,106	-24,779	-13.5%
Massachusetts	47,616	41,698	-5,918	-12.4%	40,105	-7,511	-15.8%
Maryland	32,514	28,490	-4,024	-12.4%	27,990	-4,524	-13.9%
Kansas	23,124	20,424	-2,700	-11.7%	20,789	-2,335	-10.1%
New Mexico	6,449	5,758	-691	-10.7%	5,383	-1,066	-16.5%
New Hampshire	13,295	11,943	-1,352	-10.2%	12,113	-1,182	-8.9%
D 1 .	100.005	04.070	0.510	0.00/	00.000	11.070	11.00/
Pennsylvania	103,895	94,376	-9,519	-9.2%	92,222	-11,673	-11.2%
Mississippi	12,521	11,366	-1,155	-9.2%	11,474	-1,047	-8.4%
West Virginia	16,434	14,966	-1,468	-8.9%	15,155	-1,279	-7.8%
Ohio	99,160	90,919	-8,241	-8.3%	87,652	-11,508	-11.6%

Table 2: White and Asian Public High School Graduates continued

Alaska	5,289	4,816	-473	-8.9%	5,083	-206	-3.9%
Connecticut	27,800	25,620	-2,180	-7.8%	24,195	-3,605	-13.0%
South Carolina	21,098	20,164	-934	-4.4%	20,682	-416	-2.0%
Missouri	49,951	45,841	-4,110	-8.2%	46,279	-3,672	-7.4%
Wyoming	4,609	4,202	-407	-8.8%	4,434	-175	-3.8%
Wisconsin	54,537	50,168	-4,369	-8.0%	50,127	-4,410	-8.1%
Illinois	87,902	79,316	-8,586	-9.8%	76,128	-11,774	-13.4%
Hawaii	10,016	9,212	-804	-8.0%	9,276	-740	-7.4%
South Dakota	7,460	6,966	-494	-6.6%	6,980	-480	-6.4%
Minnesota	50,621	46,031	-4,590	-9.1%	46,163	-4,458	-8.8%
Nebraska	16,743	15,089	-1,654	-9.9%	15,633	-1,110	-6.6%
Oklahoma	23,636	21,444	-2,192	-9.3%	21,387	-2,249	-9.5%
Oregon	26,307	23,767	-2,540	-9.7%	23,636	-2,671	-10.2%
Washington	52,104	47,566	-4,538	-8.7%	46,322	-5,782	-11.1%
lowa	31,922	29,439	-2,483	-7.8%	29,408	-2,514	-7.9%
Delaware	4,760	4,469	-291	-6.1%	4,589	-171	-3.6%
Virginia	53,663	50,464	-3,199	-6.0%	53,624	-39	-0.1%
Colorado	34,416	32,570	-1,846	-5.4%	35,332	916	2.7%
Georgia	44,191	42,109	-2,082	-4.7%	44,998	807	1.8%
Tennessee	38,133	36,418	-1,715	-4.5%	36,729	-1,404	-3.7%
New Jersey	65,433	62,818	-2,615	-4.0%	62,304	-3,129	-4.8%
Kentucky	35,031	34,168	-863	-2.5%	34,161	-870	-2.5%
Alabama	25,301	24,552	-749	-3.0%	23,418	-1,883	-7.4%
Indiana	53,137	51,514	-1,623	-3.1%	50,085	-3,052	-5.7%
Arkansas	20,796	20,804	8	0.0%	21,442	646	3.1%
North Carolina	52,634	51,295	-1,339	-2.5%	52,976	342	0.6%
Idaho	15,075	15,667	592	3.9%	17,575	2,500	16.6%
Florida	85,013	84,276	-737	-0.9%	83,484	-1,529	-1.8%
Texas	120,372	117,334	-3,038	-2.5%	122,129	1,757	1.5%
Utah	29,366	30,770	1,404	4.8%	33,603	4,237	14.4%
Nevada	12,032	12,177	145	1.2%	14,782	2,750	22.9%
Arizona	41,803	43,439	1,636	3.9%	46,666	4,863	11.6%

Table 3: White		Fiv	ve-Year Chang	es	Ten-Year Changes			
Public High School Graduates	Academic Year 2009-10	Academic Year 2014-15	Changes	Percent Increase/ Decrease	Academic Year 2019-20	Changes	Percent Increase/ Decrease	
United States total	1,825,187	1,654,471	-170,716	-9.4%	1,603,816	-221,371	-12.1%	
District of Columbia	97	96	-1	-1.0%	131	34	35.1%	
Louisiana	17,850	15,499	-2,351	-13.2%	15,142	-2,708	-15.2%	
Vermont	6,078	5,130	-948	-15.6%	4,892	-1,186	-19.5%	

Table 3: White Public High School Graduates continued

	3						
New York	97,397	84,785	-12,612	-12.9%	78,915	-18,482	-19.0%
North Dakota	6,155	5,371	-784	-12.7%	5,072	-1,083	-17.6%
Rhode Island	7,319	6,142	-1,177	-16.1%	5,638	-1,681	-23.0%
Michigan	80,432	72,821	-7,611	-9.5%	69,282	-11,150	-13.9%
Montana	8,719	7,600	-1,119	-12.8%	7,663	-1,056	-12.1%
Mating	10.001	10.400	1 001	14.00/	10.005	2.000	10.00/
Maine	12,091	10,400	-1,691	-14.0%	10,085	-2,006	-16.6%
California	127,342	101,734	-25,608	-20.1%	93,564	-33,778	-26.5%
Massachusetts	44,833	39,114	-5,719	-12.8%	36,519	-8,314	-18.5%
Maryland	28,920	24,186	-4,734	-16.4%	22,456	-6,464	-22.4%
Kansas	22,427	19,641	-2,786	-12.4%	19,798	-2,629	-11.7%
New Mexico	6,151	5,319	-832	-13.5%	4,900	-1,251	-20.3%
New Hampshire	13,017	11,492	-1,525	-11.7%	10,982	-2,035	-15.6%
Pennsylvania	100,234	89,493	-10,741	-10.7%	85,654	-14,580	-14.5%
Mississippi	12,285	11,074	-1,211	-9.9%	11,123	-1,162	-9.5%
West Virginia	16,277	14,745	-1,532	-9.4%	14,887	-1,390	-8.5%
Ohio	97,327	88,639	-8,688	-8.9%	84,415	-12,912	-13.3%
Alaska	4,673	4,110	-563	-12.0%	3,898	-775	-16.6%
Connecticut	26,285	23,701	-2,584	-9.8%	21,566	-4,719	-18.0%
South Carolina	20,485	19,339	-1,146	-5.6%	19,503	-982	-4.8%
Missouri	48,717	44,070	-4,647	-9.5%	43,902	-4,815	-9.9%
Wyoming	4,543	4,125	-418	-9.2%	4,322	-221	-4.9%
Wisconsin	52,284	47,865	-4,419	-8.5%	47,490	-4,794	-9.2%
Illinois	81,744	72,183	-9,561	-11.7%	67,301	-14,443	-17.7%
Hawaii	1,960	1,751	-209	-10.7%	1,550	-410	-20.9%
South Dakota	7,371	6,868	-503	-6.8%	6,859	-512	-6.9%
Minnesota	47,357	42,440	-4,917	-10.4%	41,558	-5,799	-12.2%
Nebraska	16,357	14,601	-1,756	-10.7%	14,975	-1,382	-8.4%
Oklahoma	22,698	20,246	-2,452	-10.8%	19,941	-2,757	-12.1%
Oregon	24,337	21,222	-3,115	-12.8%	20,387	-3,950	-16.2%
Washington	46,268	40,904	-5,364	-11.6%	37,929	-8,339	-18.0%
lowa	31,152	28,517	-2,635	-8.5%	28,267	-2,885	-9.3%
Delaware	4,458	4,078	-380	-8.5%	3,900	-558	-12.5%
Virginia	48,614	43,933	-4,681	-9.6%	44,043	-4,571	-9.4%
Colorado	32,647	30,353	-2,294	-7.0%	32,305	-342	-1.0%
Georgia	40,942	37,651	-3,291	-8.0%	37,610	-3,332	-8.1%
Tennessee	37,132	35,145	-1,987	-5.4%	35,000	-2,132	-5.7%
New Jersey	57,357	52,953	-4,404	-7.7%	49,158	-8,199	-14.3%
W	04.170	00.400	4.0=4	0.00/		4	4.00/
Kentucky	34,479	33,428	-1,051	-3.0%	33,025	-1,454	-4.2%
Alabama	24,696	23,745	-951	-3.9%	22,508	-2,188	-8.9%
Indiana	52,162	50,204	-1,958	-3.8%	48,338	-3,824	-7.3%

Table 3: White Public High School Graduates continued

Arkansas	20,130	19,559	-571	-2.8%	19,518	-612	-3.0%
North Carolina	50,529	48,628	-1,901	-3.8%	49,466	-1,063	-2.1%
Idaho	14,678	15,194	516	3.5%	16,836	2,158	14.7%
Florida	80,273	77,718	-2,555	-3.2%	74,776	-5,497	-6.8%
Texas	109,520	102,442	-7,078	-6.5%	101,881	-7,639	-7.0%
Utah	28,280	29,605	1,325	4.7%	31,953	3,673	13.0%
Nevada	9,678	8,297	-1,381	-14.3%	8,428	-1,250	-12.9%
Arizona	39,205	39,380	175	0.4%	40,747	1,542	3.9%

Table 4: Asian		Fiv	e-Year Chang	jes	Te	n-Year Chang	es
Public High School Graduates	Academic Year 2009-10	Academic Year 2014-15	Changes	Percent Increase/ Decrease	Academic Year 2019-20	Changes	Percent Increase/ Decrease
United States total	165,313	188,103	22,790	13.8%	231,987	66,674	40.3%
District of Columbia	63	41	-22	-34.9%	58	-5	-7.9%
Louisiana	449	360	-89	-19.8%	392	-57	-12.7%
Vermont	100	141	41	41.0%	238	138	138.0%
New York	12,588	13,652	1,064	8.5%	16,235	3,647	29.0%
North Dakota	68	63	-5	-7.4%	80	12	17.6%
Rhode Island	294	253	-41	-13.9%	290	-4	-1.4%
Michigan	3,130	4,395	1,265	40.4%	6,286	3,156	100.8%
Montana	150	141	-9	-6.0%	168	18	12.0%
Maine	228	235	7	3.1%	359	131	57.5%
California	55,543	57,640	2,097	3.8%	64,542	8,999	16.2%
Massachusetts	2,783	2,584	-199	-7.2%	3,586	803	28.9%
Maryland	3,594	4,304	710	19.8%	5,534	1,940	54.0%
Kansas	697	783	86	12.3%	991	294	42.2%
New Mexico	298	439	141	47.3%	483	185	62.1%
New Hampshire	278	451	173	62.2%	1,131	853	306.8%
Pennsylvania	3,661	4,883	1,222	33.4%	6,568	2,907	79.4%
Mississippi	236	292	56	23.7%	351	115	48.7%
West Virginia	157	221	64	40.8%	268	111	70.7%
Ohio	1,833	2,280	447	24.4%	3,237	1,404	76.6%
Alaska	616	706	90	14.6%	1,185	569	92.4%
Connecticut	1,515	1,919	404	26.7%	2,629	1,114	73.5%
South Carolina	613	825	212	34.6%	1,179	566	92.3%
Missouri	1,234	1,771	537	43.5%	2,377	1,143	92.6%
Wyoming	66	77	11	16.7%	112	46	69.7%
Wisconsin	2,253	2,303	50	2.2%	2,637	384	17.0%
Illinois	6,158	7,133	975	15.8%	8,827	2,669	43.3%
Hawaii	8,056	7,461	-595	-7.4%	7,726	-330	-4.1%
South Dakota	89	98	9	10.1%	121	32	36.0%

Table 4: Asian Public High School Graduates continued

Minnesota	3,264	3,591	327	10.0%	4,605	1,341	41.1%
Nebraska	386	488	102	26.4%	658	272	70.5%
Oklahoma	938	1,198	260	27.7%	1,446	508	54.2%
Oregon	1,970	2,545	575	29.2%	3,249	1,279	64.9%
Washington	5,836	6,662	826	14.2%	8,393	2,557	43.8%
lowa	770	922	152	19.7%	1,141	371	48.2%
Delaware	302	391	89	29.5%	689	387	128.1%
Virginia	5,049	6,531	1,482	29.4%	9,581	4,532	89.8%
Colorado	1,769	2,217	448	25.3%	3,027	1,258	71.1%
Georgia	3,249	4,458	1,209	37.2%	7,388	4,139	127.4%
Tennessee	1,001	1,273	272	27.2%	1,729	728	72.7%
New Jersey	8,076	9,865	1,789	22.2%	13,146	5,070	62.8%
Kentucky	552	740	188	34.1%	1,136	584	105.8%
Alabama	605	807	202	33.4%	910	305	50.4%
Indiana	975		335	34.4%	1,747	772	79.2%
		1,310	-		· · · · · · · · · · · · · · · · · · ·	-	
Arkansas	666	1,245	579	86.9%	1,924	1,258	188.9%
North Carolina	2,105	2,667	562	26.7%	3,510	1,405	66.7%
Idaho	397	473	76	19.1%	739	342	86.1%
Florida	4,740	6,558	1,818	38.4%	8,708	3,968	83.7%
Texas	10,852	14,892	4,040	37.2%	20,248	9,396	86.6%
Utah	1,086	1,165	79	7.3%	1,650	564	51.9%
Nevada	2,354	3,880	1,526	64.8%	6,354	4,000	169.9%
Arizona	2,598	4,059	1,461	56.2%	5,919	3,321	127.8%

Table 5: Hispanic		Fiv	ve-Year Chang	jes	Te	n-Year Chang	es
Public High School Graduates	Academic Year 2009-10	Academic Year 2014-15	Changes	Percent Increase/ Decrease	Academic Year 2019-20	Changes	Percent Increase/ Decrease
United States total	504,504	587,438	82,934	16.4%	723,204	218,700	43.3%
District of Columbia	262	225	-37	-14.1%	294	32	12.2%
Louisiana	637	630	-7	-1.1%	671	34	5.3%
Vermont	92	130	38	41.3%	141	49	53.3%
New York	22,510	20,649	-1,861	-8.3%	21,877	-633	-2.8%
North Dakota	97	101	4	4.1%	105	8	8.2%
Rhode Island	1,535	1,564	29	1.9%	1,939	404	26.3%
Michigan	3,383	3,901	518	15.3%	5,182	1,799	53.2%
Montana	241	316	75	31.1%	400	159	66.0%
				•			
Maine	156	252	96	61.5%	318	162	103.8%
California	159,780	166,765	6,985	4.4%	175,965	16,185	10.1%
Massachusetts	6,475	7,018	543	8.4%	8,436	1,961	30.3%
Maryland	4,112	6,176	2,064	50.2%	10,654	6,542	159.1%

Table 5: Hispanic Public High School Graduates continued

Kansas	2,427	2,810	383	15.8%	3,908	1,481	61.0%
New Mexico	8,803	9,176	373	4.2%	10,179	1,376	15.6%
New Hampshire	388	508	120	30.9%	1,024	636	163.9%
Pennsylvania	6,992	9,349	2,357	33.7%	12,374	5,382	77.0%
Mississippi	311	532	221	71.1%	1,341	1,030	331.2%
West Virginia	204	335	131	64.2%	381	177	86.8%
Ohio	2,413	3,125	712	29.5%	4,870	2,457	101.8%
Alaska	218	244	26	11.9%	364	146	67.0%
Connecticut	4,576	4,837	261	5.7%	5,784	1,208	26.4%
South Carolina	1,293	2,554	1,261	97.5%	6,867	5,574	431.1%
Missouri	1,996	3,001	1,005	50.4%	5,852	3,856	193.2%
Wyoming	445	497	52	11.7%	600	155	34.8%
Wisconsin	3,204	4,473	1,269	39.6%	7,087	3,883	121.2%
Illinois	19,239	21,834	2,595	13.5%	26,243	7,004	36.4%
Hawaii	436	449	13	3.0%	462	26	6.0%
South Dakota	132	166	34	25.8%	364	232	175.8%
Minnesota	2,116	3,175	1,059	50.0%	5,425	3,309	156.4%
Nebraska	1,822	2,546	724	39.7%	4,157	2,335	128.2%
Oklahoma	2,920	4,127	1,207	41.3%	6,749	3,829	131.1%
Oregon	4,394	6,449	2,055	46.8%	8,754	4,360	99.2%
Washington	7,110	8,986	1,876	26.4%	11,634	4,524	63.6%
lowa	1,636	2,600	964	58.9%	3,788	2,152	131.5%
Delaware	546	819	273	50.0%	1,543	997	182.6%
Virginia	5,503	8,233	2,730	49.6%	14,765	9,262	168.3%
Colorado	10,062	11,941	1,879	18.7%	18,410	8,348	83.0%
Georgia	5,188	9,360	4,172	80.4%	20,904	15,716	302.9%
Tennessee	1,812	4,099	2,287	126.2%	10,070	8,258	455.7%
New Jersey	16,491	18,383	1,892	11.5%	22,790	6,299	38.2%
Kentucky	1,097	2,234	1,137	103.6%	5,209	4,112	374.8%
Alabama	925	1,864	939	101.5%	4,283	3,358	363.0%
Indiana	3,155	5,247	2,092	66.3%	9,400	6,245	197.9%
Arkansas	2,036	3,914	1,878	92.2%	7,665	5,629	276.5%
North Carolina	5,962	11,453	5,491	92.1%	24,858	18,896	316.9%
Idaho	1,816	2,131	315	17.3%	2,650	834	45.9%
Florida	34,928	45,178	10,250	29.3%	62,876	27,948	80.0%
Texas	107,074	127,524	20,450	19.1%	156,043	48,969	45.7%
Utah	3,111	4,328	1,217	39.1%	6,961	3,850	123.8%
Nevada	6,217	9,644	3,427	55.1%	14,587	8,370	134.6%
ivevaua	0,217	0,0	-,				

For further reading





Contact us at: 2350 Oakdale Boulevard Coralville, Iowa 52241-9702

Phone:

800-876-1117 319-626-8380

E-mail:

ContactUs@noellevitz.com

Web:

www.noellevitz.com

All material in this paper is copyright © by Noel-Levitz, Inc.
Permission is required, in most cases, to redistribute information from Noel-Levitz, Inc., either in print or electronically.
Please contact us at ContactUs@noellevitz.com about reusing material from this paper.

Questions about this paper?

We hope you have found this paper helpful and informative. To learn more about Noel-Levitz's approach to strategic enrollment planning, visit our Web site at www.noellevitz.com/Plan. If you have questions or would like more information, please contact Jim Hundreiser, Noel-Levitz associate vice president, at 1-800-876-1117 or ContactUs@noellevitz.com.

About Noel-Levitz

Noel-Levitz is a nationally recognized higher education consulting firm that focuses on strategic planning for enrollment and student success. Since 1973, Noel-Levitz has served more than 2,600 colleges and universities throughout North America. The firm offers consulting, custom research, benchmark data, innovative tools and technologies, side-by-side plan development, and professional development. To learn more, visit www.noellevitz.com.

How to cite this paper:

Noel-Levitz. (2010). Back to the Present: Strategic Enrollment Planning for the Coming Demographic Change. Coralville, Iowa: Author. Retrieved from http://www.noellevitz.com/campuswideissues.



This paper is posted online at www.noellevitz.com.

Sign up to receive additional papers and updates. Visit our Web page: www.noellevitz.com/Subscribe