Looking Ahead: Enrollment Trends and Prospects
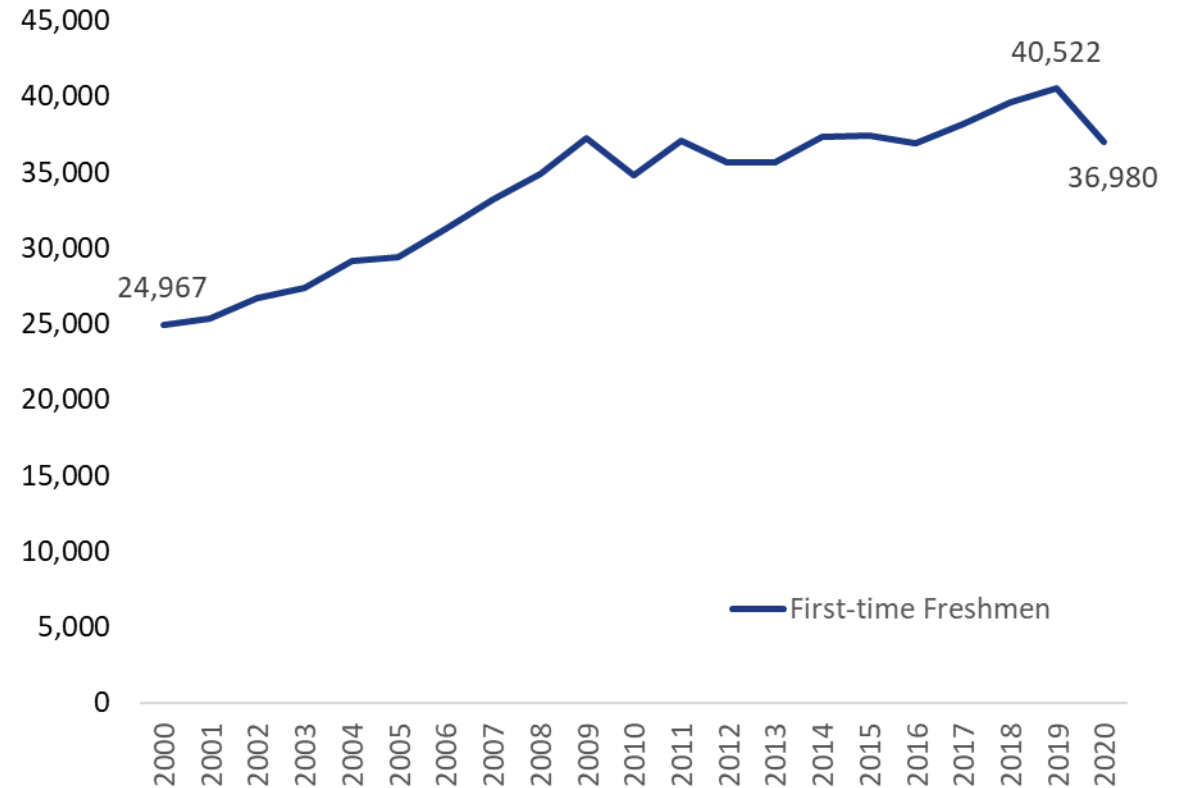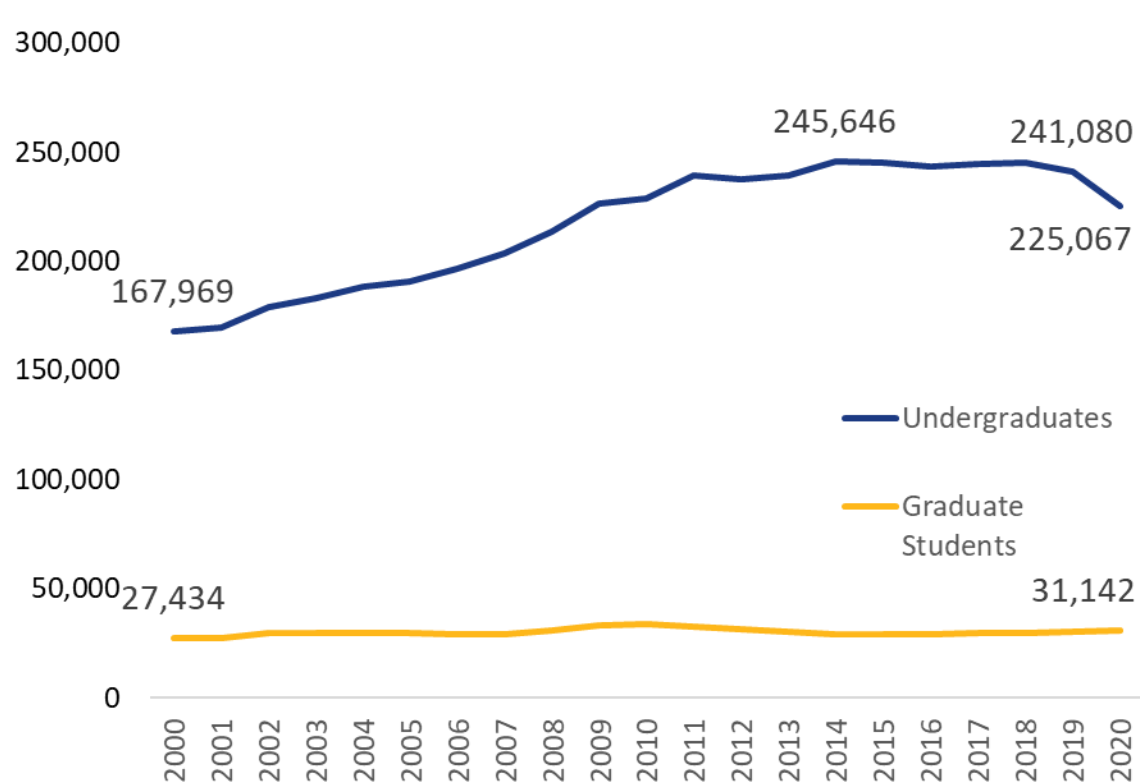
Sarah Truelsch, Office of Institutional Research and Assessment (OIRA)

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There are several factors that influence CUNY's new student enrollment prospects.

- College-age students in the market and demographic trends
- High school graduation and college matriculation rates
- CUNY's market share and yield rates
- Unanticipated, historic events: What we know about the pandemic and economic crisis and its effects on demographics and college enrollments

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CUNY'S undergraduate enrollment has risen sharply since 2000. New student enrollment has been especially strong.
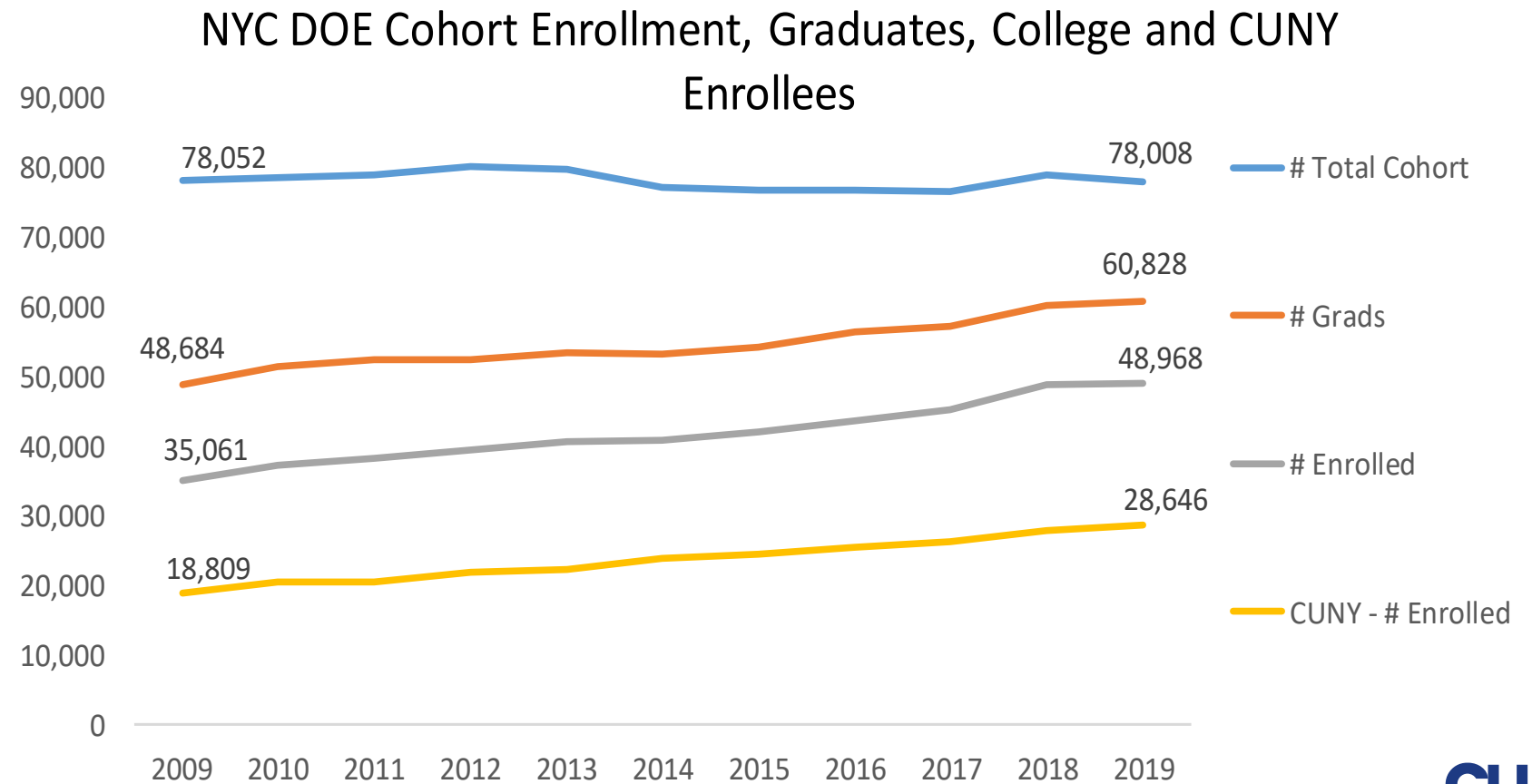
CUNY's current enrollment market is heavily concentrated on current NYC residents.

- 80% of CUNY's freshmen are graduates of NYC DOE high schools, and most of the remainder are graduates of local private and parochial schools, local HSE holders, or from the nearby New York suburbs.
- CUNY's enrollment trends have been most closely tied to the demographics of the New York City region, not the larger state or Northeast region.
  - NYC's population (and thus school enrollment) trends are different from those of Upstate New York.

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Over the past decade, increases in NYC DOE graduation and college-going have driven increases in CUNY's enrollment.

Between the NYC DOE Class of 2009 and 2019:

- 9th grade enrollment changed **0%**
- The number of high school graduates increased **24%**
- The number enrolling in college increased **40%**
- And the number enrolling at CUNY increased **52%**

NYC DOE Cohort Enrollment, Graduates, College and CUNY Enrollees

Total Cohort: 78,052 → 78,008
Grads: 48,684 → 60,828
Enrolled: 35,061 → 48,968
CUNY - # Enrolled: 18,809 → 28,646

2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

Source: OIRA calculations based on data provided by the NYC DOE

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Long-term demographic forecasts for New York City should be interpreted with caution.
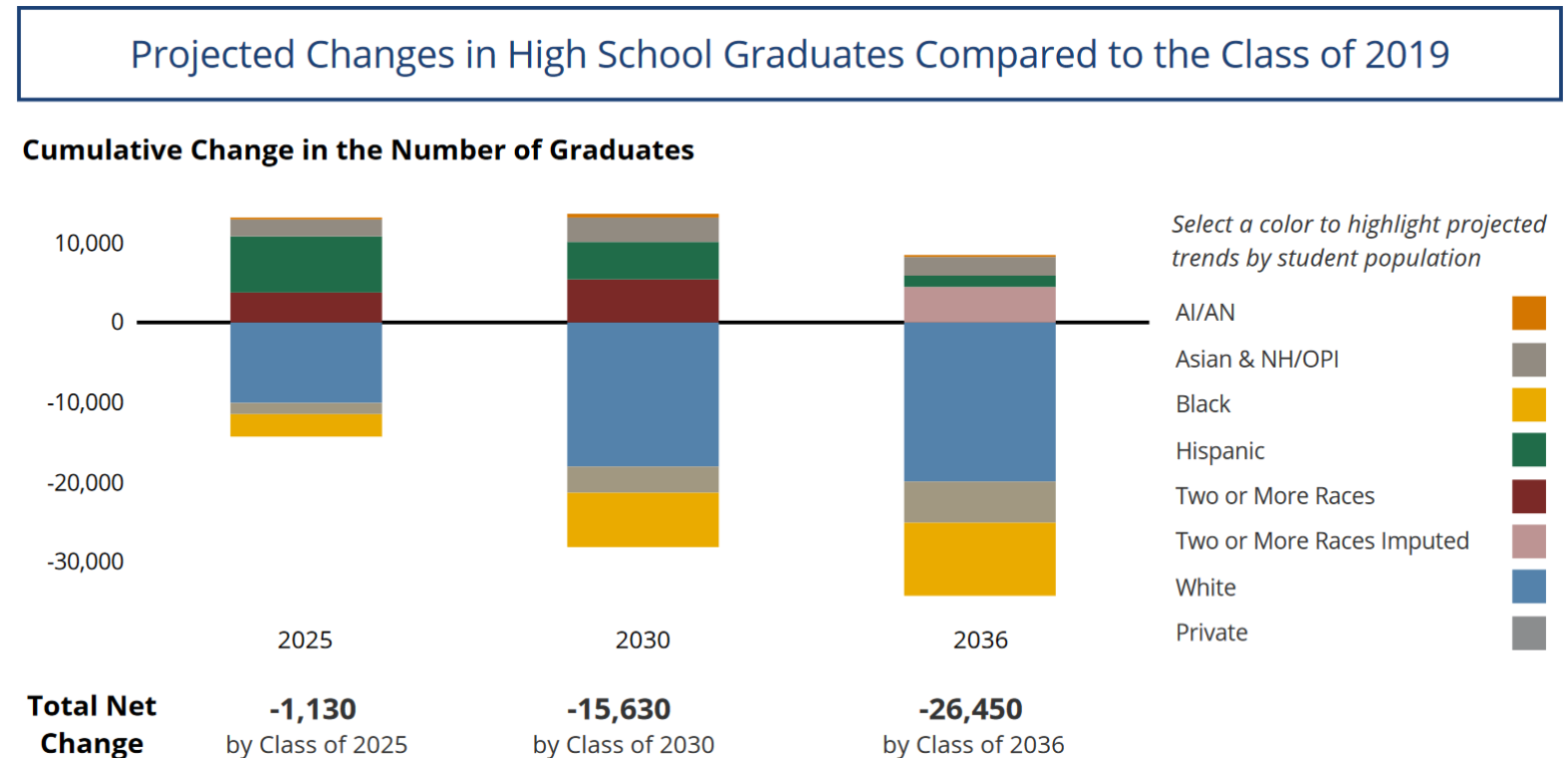
- It is very hard to predict future city population changes because of the "churn" that characterizes the city.

- International migration is a large factor in NYC population figures and harder to predict than other demographic trends: About 36% of city residents are immigrants. Influenced by

  - The economy
  - Politics and immigration policy

Example of population churn 2010 to 2011

Estimated Components of Population Change New York City, 2010-2011

Legend:
- Population Change
- Natural Increase
- Net Migration
- Net International Migration
- Net Domestic Migration

X-axis: Thousands (-150 to 150)

Source: U.S. Census Bureau, 2011 Estimates Program as revised by Population Division-New York City Department of City Planning

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WICHE projects that statewide NY high school graduates will have peaked in 2019.

- New York State total public and private high school graduates are projected to peak in 2019 at 214,531 graduates

- Note very different projections by racial and ethnic groups
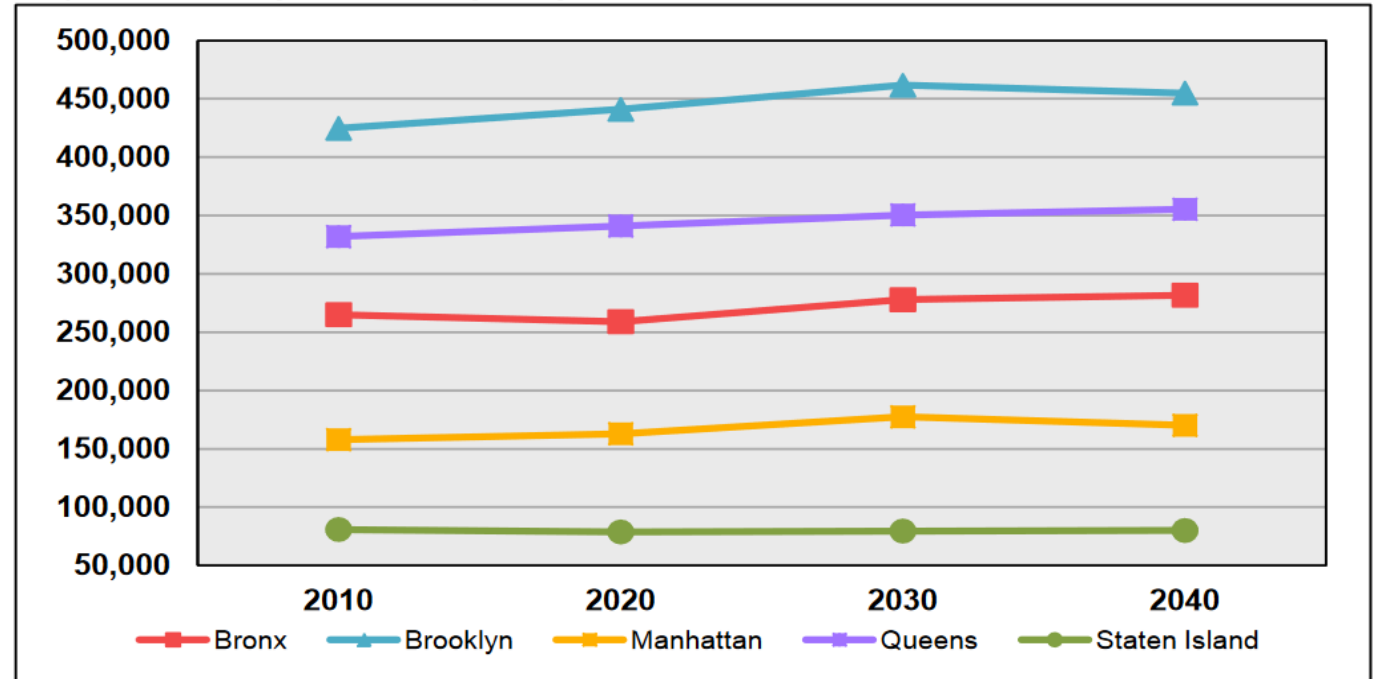
Projected Changes in High School Graduates Compared to the Class of 2019

Cumulative Change in the Number of Graduates

Select a color to highlight projected trends by student population

- AI/AN
- Asian & NH/OPI
- Black
- Hispanic
- Two or More Races
- Two or More Races Imputed
- White
- Private

Total Net Change	-1,130 by Class of 2025	-15,630 by Class of 2030	-26,450 by Class of 2036
	2025	2030	2036

Source: WICHE, Knocking at the College Door, New York Profile

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New York City population estimates are more mixed.

- As of 2013, the city predicted very modest growth in the city's school age population through 2040

- More recent estimates from New York's School Construction Authority predict declines in the city's high school population between 2018-19 and 2028-29

Projected Borough School-Age Populations, 2010-2040

Legend: Bronx, Brooklyn, Manhattan, Queens, Staten Island

Source: DCP adjusted 2010 decennial census data; DCP Population Projections, 2020-2040

The pandemic and economic crisis may impact New York City demographic trends in multiple ways.

- Employment prospects will affect the city's large foreign-born immigrant population as well as the numbers of native-born people seeking to move into or out of the city.

- The NYC DOE has reported declining enrollments in the lower grades—unclear what rebounds to expect with return to in-person instruction.

The pandemic likely affected and will affect recent and near-term college-going plans.

- CUNY enrolled **9% (3,500) fewer** freshmen in fall 2020 compared to fall 2019. Most of that decline was at community colleges, which were down **15%.**
  - This mirrors national trends of a **21% decrease** in freshmen at community colleges and **13%** drop in freshman enrollments overall.
- Preliminary national data show high school graduation rates were stable in the school year 2019-2020, but far fewer graduates went to college immediately after high school this fall, declining by **22%** compared to 2019 graduates. (NSCH)
- The NYC DOE also reported an increase in the high school graduation rate for the class of 2020. We do not yet know the college enrollment rate.

- Looking toward fall 2021:
  - CUNY applications down about 12% compared to this time last year
  - NYC DOE: 43% of high school seniors have filed FAFSA compared to 50% at this time last year
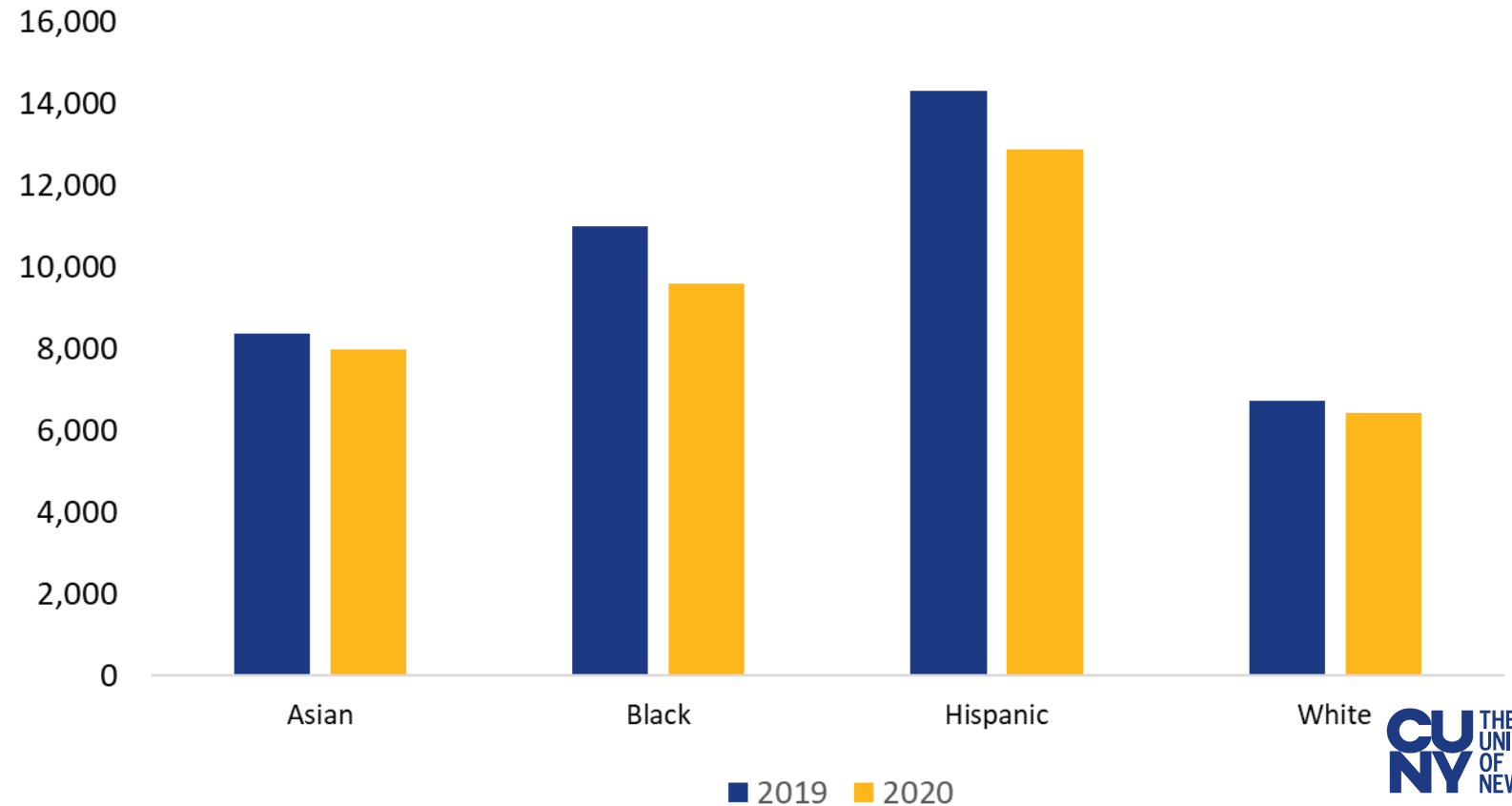 - Nationally, FAFSA filing was down 11% year-over-year as of Jan. 1

Source: [National College Attainment Network's tracker](#).
**Reported at CUNY DOE Steering Committee

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There were particularly large enrollment declines in Black and Hispanic freshmen.

- Overall, 3,500 fewer freshmen in fall 2020 than fall 2019.

- Enrollment declines were much steeper for male vs female freshmen, and especially for Black and Hispanic male freshmen.

  - Black male freshman enrollment declined 17.3%

  - Hispanic male freshman enrollment declined 15.6%.

  - In contrast, enrollment of Asian and White women was down barely 1% or less.

CUNY Freshman Enrollment by Race and Ethnicity: Fall 2019 Compared to Fall 2020
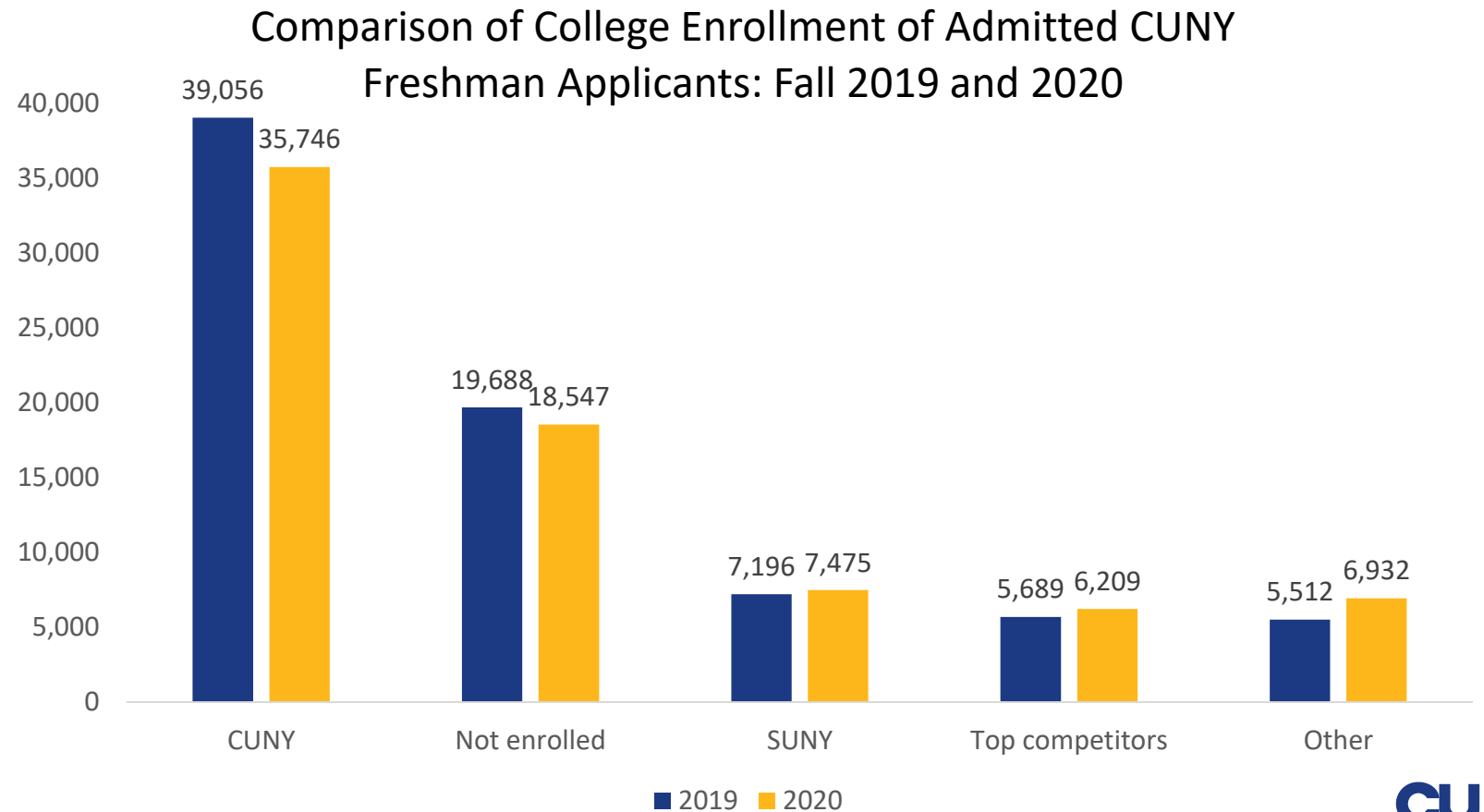

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CUNY's market share in NYC has been strong over the past 10 years…

- Roughly 58-60% of NYC DOE graduates who enroll in college anywhere within six months of graduation enroll at CUNY.

- CUNY educated ~58% of all undergraduates in New York City depending on the year (including the proprietary sector).
  - 69.0 % of all Asian undergraduates
  - 70.1 % of all Black undergraduates
  - 73.4 % of all Hispanic undergraduates
  - 42.0 % of White undergraduates

But 2020 brought cause for worry. CUNY's freshman applicant yield rate declined between fall 2019 and Fall 2020.

- Every year, about 25% of the students who are admitted to CUNY do not enroll at any college (CUNY or on-CUNY)
- CUNY's appears to have lost more enrollments to SUNY, top local competitors, and a wide range of other colleges in 2020
- CUNY also appeared to admit 2,000+ fewer applicants
- We need more time and information to reconcile these findings with other indicators

Comparison of College Enrollment of Admitted CUNY Freshman Applicants: Fall 2019 and 2020

	2019	2020
CUNY	39,056	35,746
Not enrolled	19,688	18,547
SUNY	7,196	7,475
Top competitors	5,689	6,209
Other	5,512	6,932

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What does this mean for CUNY enrollments?

- The pandemic has added a large amount of uncertainty to demographic forecasts that were already hard to predict.

- History tells us that trends in high school graduation, college-going, and CUNY market share are as important as demographic changes.
  - We have more control over these factors than over demographics.

- When faced with uncertainty, it is smart to diversify.
  - Given the historically strong concentration of enrollment from NYC residents, CUNY can look to NYC resident populations outside of recent HS graduates: adult and returning students, non-degree enrollments, workers interested in upskilling
  - Expanded remote learning options and more strategic recruitment might allow CUNY to attract more enrollments outside our immediate region.
  - Not all enrollment categories contribute equally to revenue: what is the place of graduate enrollments and out-of-state enrollment in supporting revenue?

- Improved student retention will reduce pressure for large new student enrollments.

- **What are your thoughts and questions?**

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