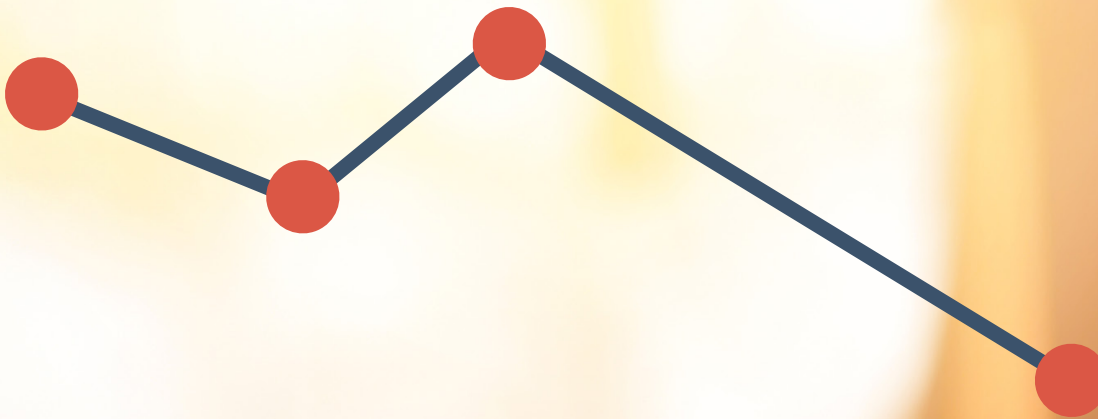


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# Community college enrollment crisis?

HISTORICAL TRENDS IN COMMUNITY COLLEGE ENROLLMENT



## Table of Contents

Executive Summary.....	1
Introduction.....	1
Community College Enrollment Trends .....	2
State Trends .....	10
Community College Enrollment in Context .....	11
High School Graduates.....	13
Conclusion .....	15
Appendix.....	16

## Executive Summary

Community college enrollments mostly grew during the first decade of the 21st century, accelerating rapidly at the end of that decade as the Great Recession hit. Since a peak enrollment in 2010, the total community college enrollment has decreased each fall, declining by more than 1 million students nationally (14.4%) between 2010 and 2017.

Over the course of the 17 years studied in this paper, there were important differences in the enrollment trends for different segments of community college populations. A few key trends include:

- Full-time student enrollment declined at a faster pace than did the part-time student enrollment between 2010 and 2017.
- All age groups showed declines in enrollment between 2010 and 2017 with the exception of students under the age of 18. This is largely due to the rapid increase of high school students enrolling in community college classes.
- While always a majority, women have decreased their share of the community enrollment since their highest representation in 2004.
- White students were no longer the majority of students enrolled nationally in community colleges in the fall of 2014.
- While White student enrollment has steadily declined since 2010, non-White student enrollment has remained relatively steady since 2012—largely driven by increases in Hispanic students.
- Analysis of state data suggests that enrollments have regional variations. Two states with College Promise programs showed enrollment increases corresponding with implementation of their state-wide free-tuition programs
- While enrollment in community colleges has seen decreases since 2010, 4-year public colleges, and to a lesser extent 4-year independent colleges, have not seen decreases.
- Finally, the paper highlights a few other trends that are related to community college enrollment, suggesting that the number of high school graduates and college continuation rates of those students may have impacts on community colleges.

## Introduction

Community college enrollment has been in decline nationally since peaking in 2010. This report will put the recent community college trends into perspective by reviewing community college enrollment from 2001 through 2017, and by examining concurrent trends that are related to community college enrollments. This report will provide the reader with a better understanding of enrollment changes for students with different characteristics (such as age, gender, or race and ethnicity) as well as by enrollment intensity. In addition, community college enrollment trends will be compared to other sectors of higher education. Furthermore, this report will examine enrollment trends in the context of other national, non-higher education trends such as unemployment rates and high school graduation rates to better understand the trends we are seeing in community college enrollment.

## About the data

The majority of the data used in this report comes from the Fall Enrollment Survey of the Integrated Postsecondary Education Data System (IPEDS). All institutions that participate in the federal financial aid program are required to submit data to the U.S. Department of Education (ED) through IPEDS. IPEDS collects information on a range of postsecondary topics including graduation rates, finances, human resources, completions, and enrollment. For the purposes of this

paper, the annual Fall Enrollment Survey was used as the primary data source. Data from each year were used to look at enrollment trends across a 17-year period. One exception to the annual use of data was on enrollment by age, as this data is only required to be reported by institutions every other year.

Several other sources of national and federal data—to the extent possible—were used to provide a context for the enrollment data. Data sources include the monthly unemployment rate from the Bureau of Labor Statistics (BLS), high school graduation counts and projections, and high school graduation rates from the National Center for Education Statistics (NCES).

## Defining Community Colleges

For the purpose of this analysis, community colleges are defined as regionally accredited institutions, which primarily award the associate degree as their highest award. As a result of using this definition, community colleges in this report will include colleges that offer a limited number of baccalaureate degrees, such as Miami Dade College in Florida or Bellevue College in Washington. Using this definition also means that community colleges in this analysis will exclude associate degree-granting institutions which do not hold a regional accreditation (such as Reid State Technical College in Alabama which is accredited by the Council on Occupational Education). These data, therefore, will not be consistent with data as generally reported by the U.S. Department of Education’s NCES. NCES generally reports colleges based on the highest degree the institution offers, and does not use regional accreditation as a demarcation for community colleges. For more details on the process for defining and analyzing the data presented here, please contact the author.

## Community College Enrollment Trends

Data discussed in this report tracks community college enrollment over a 17-year period, from the fall of 2001 to the fall of 2017. Figure 1 displays the fall headcount enrollment (the number of students enrolled at a specified period of time in the fall term of each institution) in community colleges from fall 2001 through fall 2017. These data show an increase in enrollment in the early part of the century, increasing by 5% between 2001 and 2002. The rate of enrollment increase slowed to a 0.7% average annual increase between 2002 and 2006 (2.8% total for the period). Between 2006 and 2010, enrollments spiked to a record high of more than 8 million students, increasing by 20.3% over this period, or 4.8% annually. Community college enrollment has been declining since their peak in 2010 by an average of 2.2% each year, or 14.4% over the course of the 7 years. Enrollment in 2017 was still greater than 2006, but was less than the level in 2007.

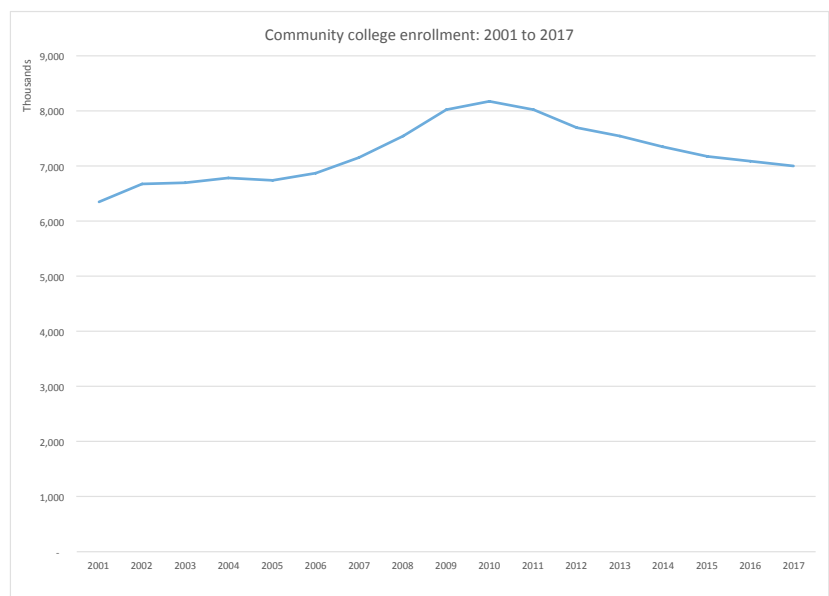


Figure 1

Recently released enrollment estimates for the fall of 2018 from the National Student Clearinghouse<sup>i</sup> indicate that community college enrollments declined an additional 3.2% from the prior year, which would be below 2006 levels.

Community college professionals frequently claim that the economy is an important driver of community college enrollments. Of particular note during the time period investigated is the Great Recession, which economists indicate began in December 2007. While the recession technically ended in the second quarter of 2009, solid job growth was not seen until 2011.

To demonstrate the relationship between community college enrollment and unemployment, Figure 2 plots the national unemployment rate against the fall headcount enrollment of community colleges. The data in this figure demonstrates a pattern of enrollment that, to a large degree, mirrors the unemployment rate of the country. It is clear in this chart that the Great Recession, and its lingering impact on the U.S. economy and jobs, had a strong relationship to community college enrollment, which peaked at more than 8 million students in fall of 2010—10 months after the peak unemployment rate of 10%. The data also show an increased enrollment in the early part of the 2000's that was reflective of the early 2000s recession and subsequent unemployment rate. While the unemployment rate and economy are not the only drivers of community college enrollment (several other issues will be explored later in this paper), it is a critical factor to consider when analyzing community college enrollment.

To better understand the enrollment trends across the 17 years investigated, this paper looks at key student characteristics available for analysis. Analysis of these trends reveals interesting differences for different student populations across the years studied.

## Enrollment Status

Figure 3 shows the distribution of community college enrollment by attendance status --full-time or part-time enrollment. The data indicate that during the enrollment surge of 2007 through 2010, the share of students who attended full time also increased, from 40.9% in 2007 to 42.5% in 2010. Following the peak in 2010, the ratio of full-time students steadily decreased to a low of 36.6% in 2017.

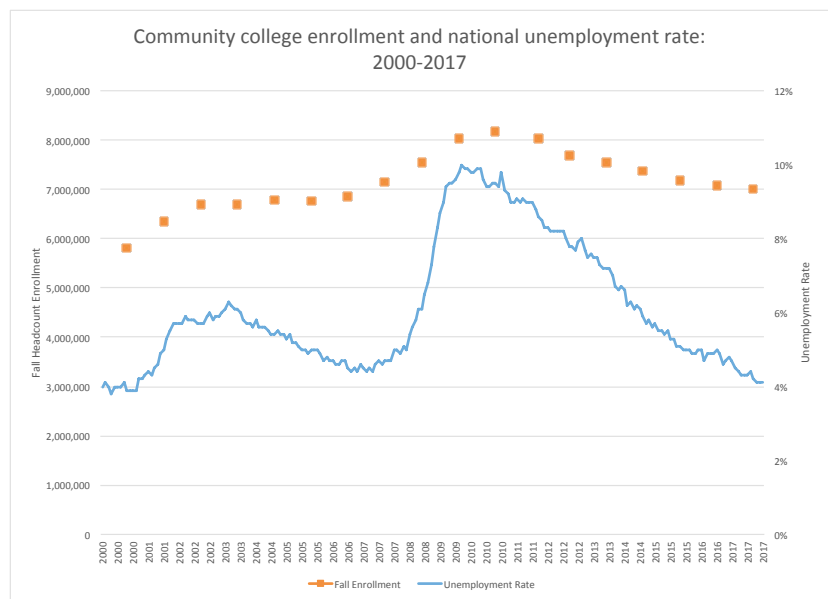


Figure 2

One measure of community college attendance frequently used to determine funding levels for community colleges is full-time equivalency (FTE)<sup>ii</sup>. FTE calculates enrollments where full-time students are equal to one FTE, while part-time students account for a fractional portion of an FTE based on their credit load. As a result of the decrease in total enrollment, and full-time enrollment decreasing at a faster pace than part-time enrollment, FTE enrollment between

2010 and 2017 decreased at a faster pace than headcount enrollment. Therefore, the impact on FTE-driven community college funding was even greater than if funding was based on fall headcount enrollment alone.

## Age

Community colleges have always had a diversity in the age range of students attending. Across the time period investigated in this report, enrollment trends showed considerable variation for different age groups. Traditional-aged students (18 to 21 years of age) make up the largest portion of community college students. As shown in Figure 4, the traditional age group showed

increases in enrollment from 2001 to peak enrollment of 3.14 million students in 2009. Since 2009, enrollment for this age has declined by around 283,000, or about 9.0%. The next age group (22-29-year-olds) showed a more gradual increase in enrollment from 2001 and maintained enrollment increases through 2011, then declined. The 30-49-year-old group had a different enrollment pattern over the past 17 years. The enrollment for this age group declined from 2003 to 2007, jumped up in 2009, then declined precipitously from 2011 to 2017. This age group saw a 34% enrollment decrease between 2011 and 2017. The only age group showing an increase after 2011 was students who were less than 18 years old. This age group increased by more than 350,000 between 2009 and 2017, or an increase of 65%.

Figure 5 represents the same data, but shows the distribution of the total enrollment by age group. Of note in these data is the steady decline of 30-49-year-olds as a proportion of the student population, and the rise of the 18-21-year-olds and 22-29-year-olds as a proportion of the population. Importantly, even though the 18-21-year-old students saw a significant numerical drop the last few years (decreasing by around 283,000), this group of students increased as a percentage of the overall population (more than 40% of all students in 2017). Stated differently, even though traditional-aged students are decreasing in numbers, they are increasing in their importance for community college enrollment.

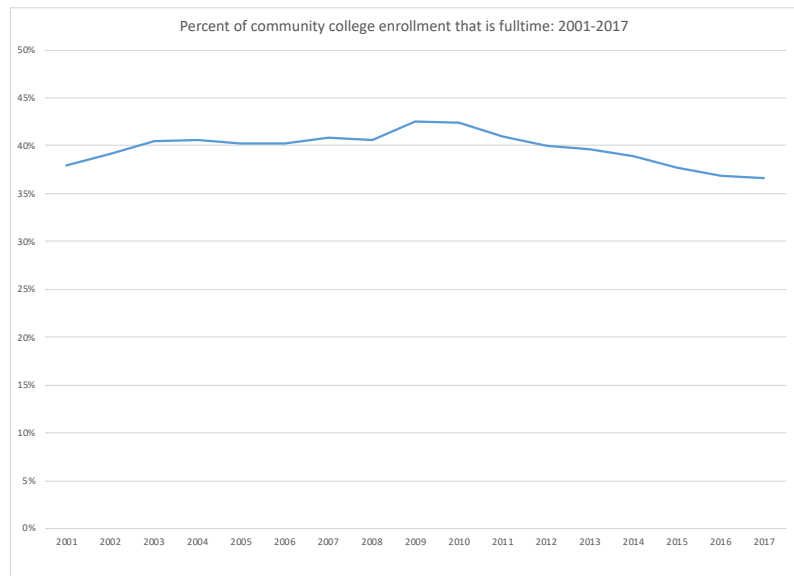


Figure 3

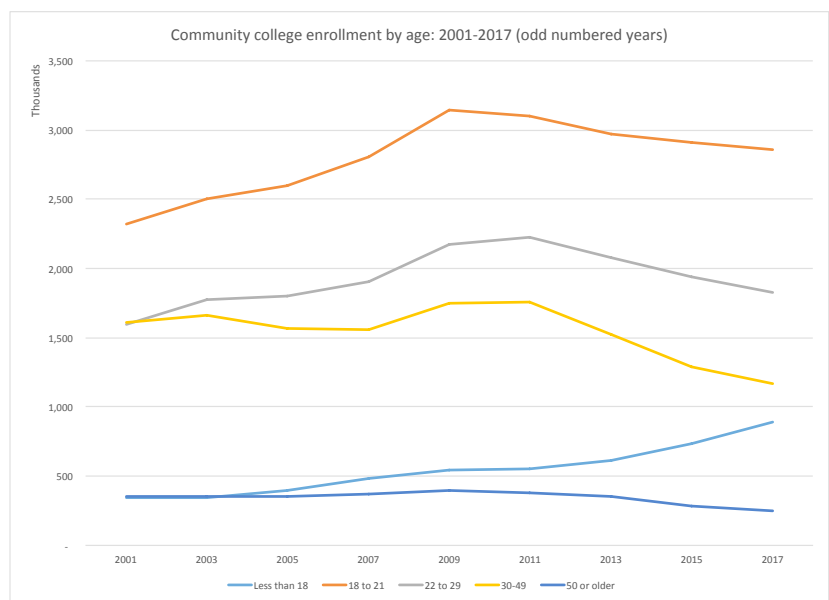


Figure 4



To get a deeper appreciation of the trends in enrollment by age, enrollment trends of the selected age groups were separated by enrollment intensity (see Figures 6-10).

One of the most striking findings is the dramatic and continuing rise in enrollment for the less-than-18-year-old students who were enrolled part time (Figure 6). In fact, the number of part-time students less than age 18 dramatically increased, going from 287,000 in 2001 to more than 773,000 by 2017—an increase of 170%. This age group saw a much less dramatic, but steady increase in the number of students attending community college full time. While the data do not allow us to determine whether these students have graduated from high school, there is strong evidence that these students are predominantly dual enrolled students—students enrolled in college classes while still enrolled in high school. Data from a separate NCEES research study<sup>iii</sup> indicated that in the 2010-11 academic year, there were more than 873,000 students enrolled in formal community college dual enrollment programs, and another 106,000 high school students taking community college credits outside of dual enrollment programs. This estimate of 980,000 high school students was based on the full academic year, not just fall enrollment. However, if the trend represented by the fall enrollment data are projected onto the 980,000 students enrolled in 2010-11 academic year, then approximately 1.6 million high school students took community college credits during the 2015-16 academic year.

The trends for traditional-aged students (students aged 18-21) shown in Figure 7 stand apart for several reasons. First, this is the only age group where full-time enrollment is greater than part-time enrollment—for all other age groups, students are more likely to be enrolled part time. Second, with the exception of the less-than-18-year-old group, it is the only age group where part-time enrollment has remained relatively steady since 2011. However, the gap between the number of part-time and full-time students in 2017 was the smallest since

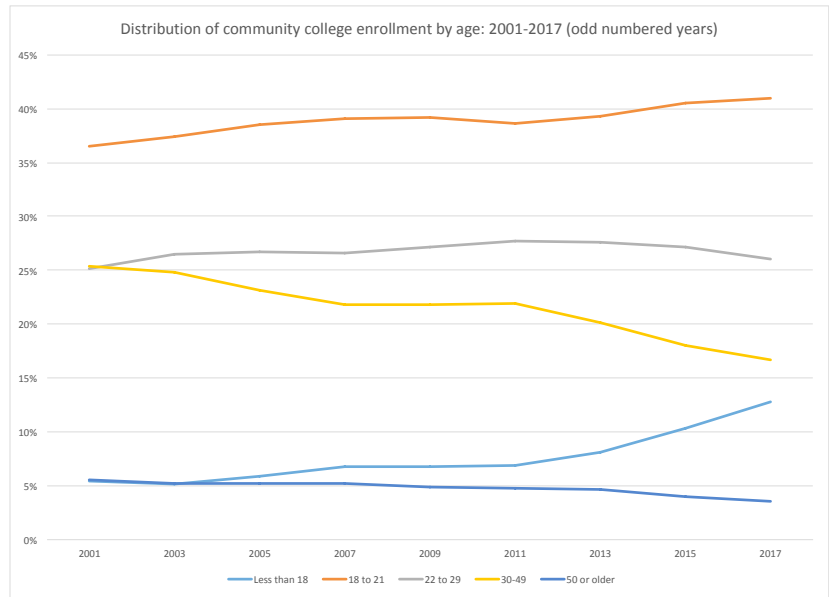


Figure 5

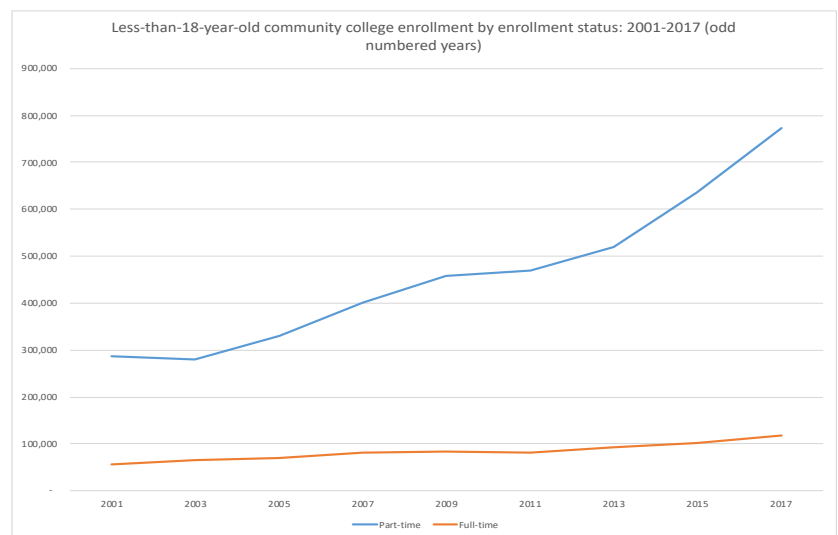


Figure 6

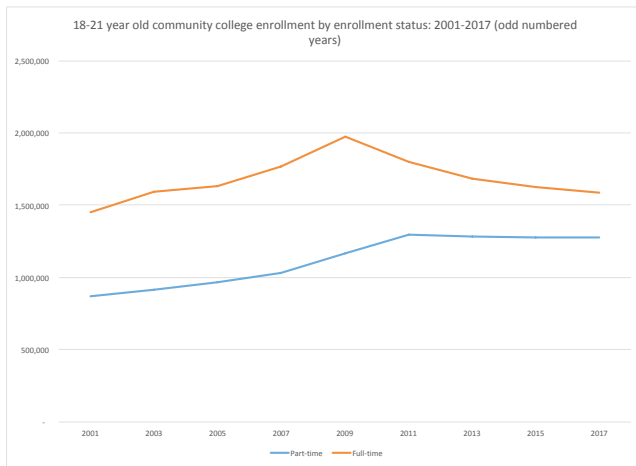


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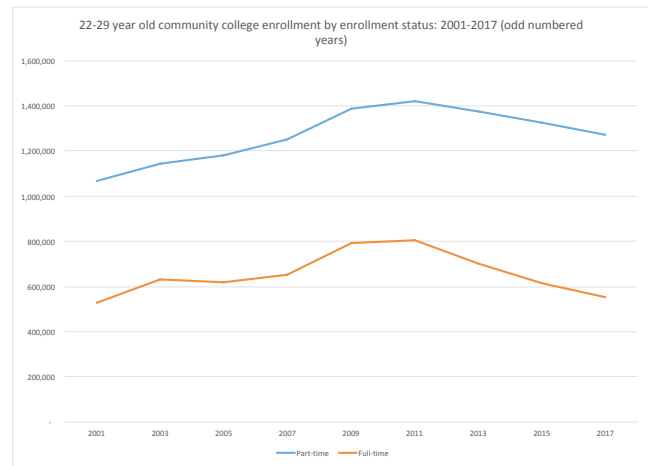


Figure 8

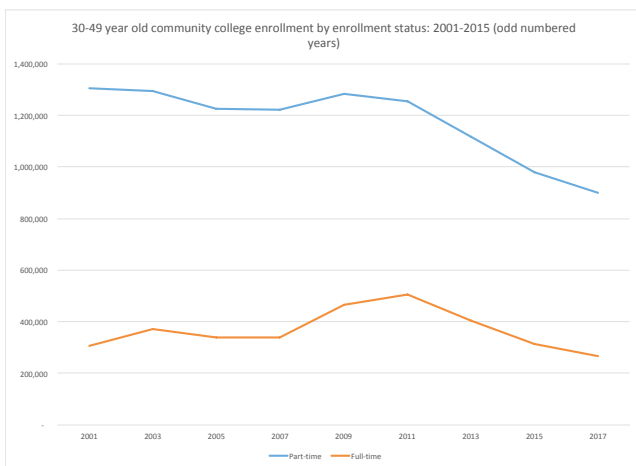


Figure 9

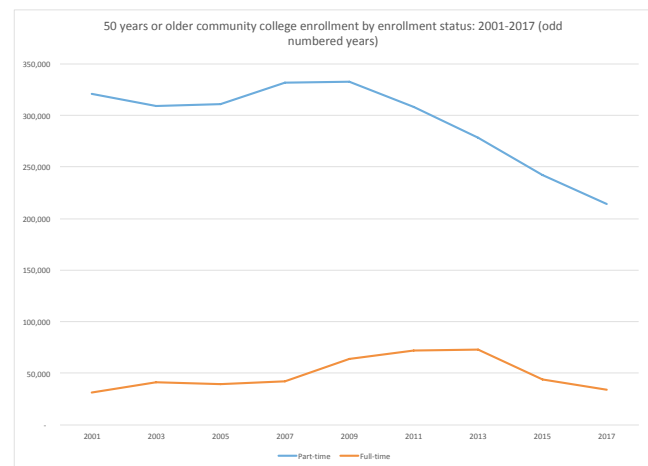


Figure 10

2001. Stated differently, the number of traditional-aged students attending part-time has been a consistent segment of community college enrollment in recent years, while full-time traditional-aged students have been decreasing (down by more than 392,000 students between 2009 and 2017). If this trend continues, part-time students will outnumber full-time students for this age group in the future.

For students aged 22-29, enrollments patterns were similar for part-time and full-time students—increasing in number through 2011, then declining through 2017 (Figure 8). While the pattern was similar for the two groups, the rate of increase entering the Great Recession was steeper for full-time students, and the decline after 2011 more rapid for full-time enrollees. Given the high unemployment rate in at the end of the recession, one possible explanation for the increase for this age group is the need for upskilling or retraining for displaced workers. Part-time enrollment would require a longer period of enrollment to attain a credential, or similar experience, and therefore may account for the slower decline in enrollment for this aged population.

While the enrollment trend shown for students aged 30-49 attending full time mirrored that of students aged 22-29 (Figure 9), it even more clearly tracked with the periods of higher unemployment rates during the two recessions of the 2000s noted earlier in this report (see Figure 2). The data suggest that the population of individuals aged 30-49 who are



displaced from employment may be particularly likely to enroll full time at community colleges. However, unlike the next younger age group, this age group did not show increases for part-time enrollment in the early part of 2000s, did have a slight increase in 2009, but then continued the decreases shown earlier in the 2000s.

Enrollment for individuals aged 50 or older (Figure 10) was the smallest age group enrolled in community colleges, reaching a peak enrollment of nearly 400,000 students in the fall of 2009 (by contrast, there were more than 3.1 million traditional-aged students in fall of 2009). The enrollment trend for this age group was similar to the students aged 30-49. Part-time enrollment peaked in 2009 for this age group, and declined consistently each of the following years. Full-time enrollment for this group did not peak until fall of 2013, however the number enrolled full time was relatively small with approximately 73,000 students.

## Gender

Over the course of the years studied in this paper, female enrollment has out-paced male enrollment in community colleges. The distribution of enrollment by gender has been relatively stable, ranging from a high of 58.7% female enrollment to a low of 56.3% female enrollment (Figure 11). The trend line, however, does provide some interesting data. Women increased their share of enrollment from 2001 to 2004 to a high of 58.7%. The share of community college enrollment that was female declined during the remainder of the period investigated, with the exception of 2011, and ultimately reached its lowest proportion of enrollment at 56.3% in 2016. As a point of reference, this chart also shows the percent of undergraduates in the rest of higher education who are female. Females comprise a greater percentage of all undergraduate enrollment, and females make up a higher percentage of community college enrollment than is seen in other degree-granting institutions.

## Race / Ethnicity

This section investigates the trends in community college enrollment by the racial and ethnic background of students. When reviewing these data it is important to note that the way racial and ethnic data were collected by the U.S. Department of Education changed between 2008 and 2010. As a result, the trends may in part be an artifact of the changes in how data were collected and reported.

Key changes instituted at that time include colleges reporting students with more than one race as a separate category and classifying students as Hispanic if they indicate they are of Hispanic ethnicity, regardless of their race. As a result, students who report more than one race would previously have been in one of the race categories, and will no longer be in that category, but will appear in the “more than one race” category. Or, for

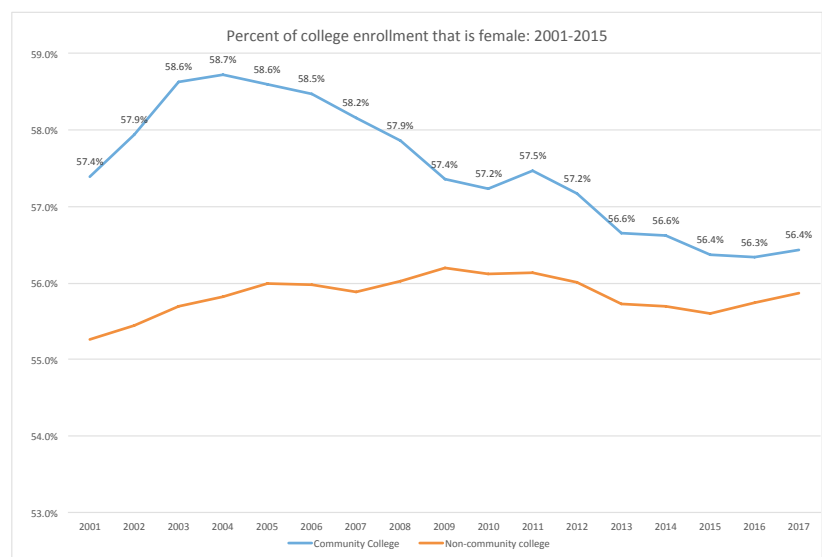


Figure 11

example, students who indicate that they are Hispanic and Black or Native American will be included in the “Hispanic” classification, not in the Black or Native American categories. There is no way to determine the extent these changes impact the trends, so readers are urged to consider these definitional changes when interpreting these findings.

In reviewing the 17-year trends, one of the most notable trends is the steady decline of White students as a percentage of students enrolled in community colleges (Figure 12). The percentage of the community college enrollment that is White dropped from a high of 60% in 2001 to 46.2% in 2017. In terms of the number of students, the number of White students peaked in 2010, similar to the overall trend for community college enrollment. However, the overall 17-year trend reflected a decrease of more than 581,000 (15%) White students between 2001 and 2017, while enrollment for all other students increased by more than 1.2 million (48%) over the same period. As shown in Figure 13, enrollment in community colleges for non-White students has been level over the four most recent years, suggesting that the drop of White student enrollment is a significant factor in the overall decrease in community college enrollment from 2012 to 2017.

Figure 14 highlights the distribution of non-White enrollment from 2001 to 2017. The most striking trend is the steady increase in the percent of Hispanic students enrolled in community colleges. In 2001, Hispanic students were 13.9% of community college students, and by 2017, they made up nearly a quarter (24.9%) of community college enrollments. In terms of raw numbers, Hispanic student enrollment nearly doubled, increasing by 98% between 2001 and 2017, and despite the overall decline in enrollments at community colleges between 2010 and 2017, Hispanic enrollments increased each year across that timeframe.

Following students of Hispanic origin, the next largest minority enrollment group in community colleges was African American students. In 2011, African American students had their highest enrollment (1.17 million students) and had their

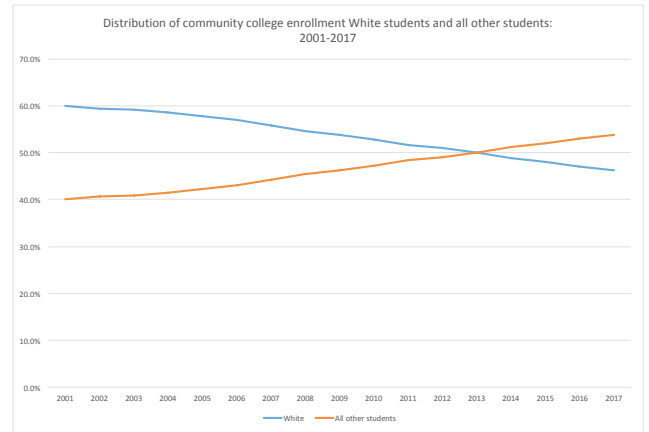


Figure 12

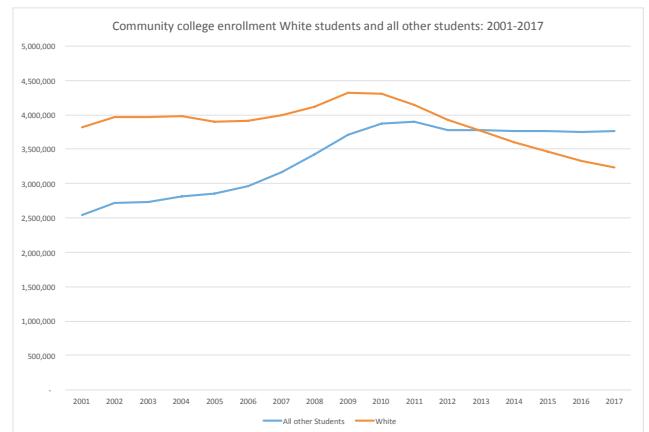


Figure 13

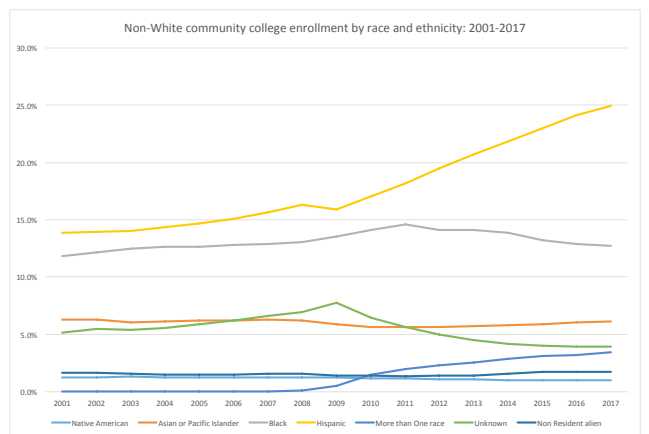


Figure 14

largest proportion of community college enrollments (14.6% of all students). Since that time, the number of African American students has decreased to around 890,000 in 2017, comprising only 12.7% of community college enrollments.

Students who indicated they were of Asian and Pacific Island descent represented approximately 6% of the community college population. Their proportion of community college enrollment fluctuated somewhat across the 17-year period from a low of 5.6% in 2011 to a high of 6.3% in 2001 and 2007. The number of Asian and Pacific Island students peaked in 2009 at 472,000, declining the next 4 years to 425,800 and remaining relatively flat into 2017.

While the percentage of Native American students has remained relatively constant, it has slowly decreased over the 17-year period from a high of 1.3% in the early 2000s, to 1.0% in 2017. In 2009, nearly 97,500 community college students indicated they were Native American, but by 2017 the number had dropped to 68,000.

As noted above, the category of more than one race was first collected for fall of 2008. It was optional in 2008 and 2009 as colleges transitioned to the new race and ethnicity categories, and this is reflected in the data reported. Since this data element was first collected, students who reported that they were more than one race has shown a steady increase both in terms of the percentage of community college students (to a high of 3.4% in 2017) as well as the overall number of students (to a high of 240,000 in 2017).

Non-resident alien students<sup>iv</sup> are fewer than 2% of the total community college enrollment. In 2017, approximately 121,000 community college students were non-resident aliens—below their peak enrollment 2 years earlier. Non-resident alien students constituted their smallest share of community college enrollment in 2011 at 1.3%.

The enrollment trends reported above represent the total enrollment in community colleges each fall. Another way to look at the trend in diversity in community colleges is to look at first-time attendees—students new to postsecondary education<sup>v</sup>. While the data tend to mirror the total population of students attending community colleges, as demonstrated in Figure 15, the trend line for White students and Hispanic students is even more dramatic for first-time students than for the population as a whole. The percentage of first-time students at community colleges who are White has decreased from 61% in 2001 to 43% in 2017. The percent of first-time students who are Hispanic has almost doubled during this same time period, and now represents more than a quarter (27%) of all students who begin in community colleges. It also is notable that the percentage of first-time students who are Black has consistently been higher than their representation in the total enrollment. In other words, Black students are more likely to be first-time in college than a returning student in community colleges.

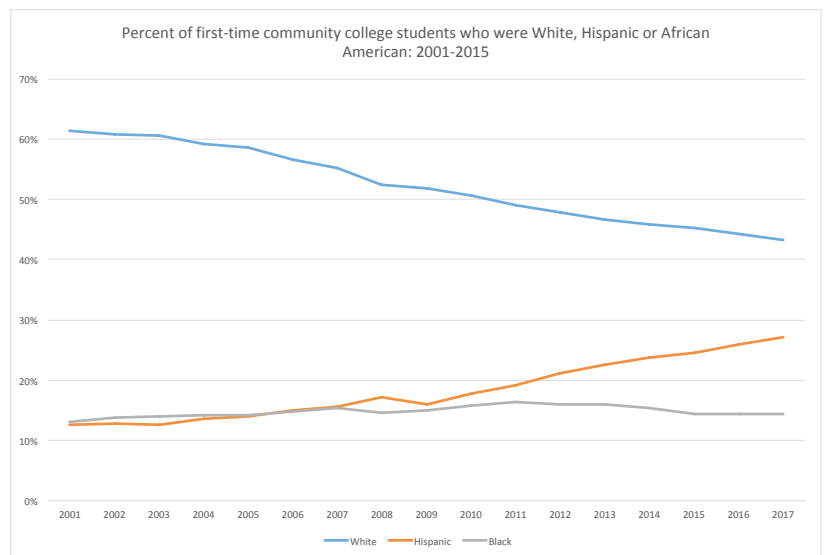


Figure 15

## State Trends

Enrollment trends also were analyzed at the state level to see if there were any noticeable trends by states. Analysis of state trends was limited to the public community colleges in each state. There are a number of ways state policies can impact community college enrollments, such as tuition and fee policies for public colleges, student aid policies for public colleges—particularly College Promise type programs, transfer and articulation policies, state funding to community colleges, and a variety of other policies. Exploring all of these is beyond the scope of this paper, but it is useful to get a sense of the enrollment trends for the last 8 years—from before the recession in 2007 to the most recent data available (2017).

Between 2016 and 2017, total community college enrollment decreased by 1.4%. However, this enrollment decline was not consistent across all states. During this period, 36 states had decreases in community college enrollment and 14 states saw increases in community college enrollment. Texas saw the largest numeric increase (10,300) and Idaho the largest percentage increase (5.3%) increase in the last year of data available. On the negative side, Georgia saw the largest numeric (20,800) and percentage (12.6%) decrease. However, it is important to note that Georgia has been consolidating community colleges into their universities, and some of the enrollment decline has to do with colleges no longer reporting their data as community colleges. Illinois had the second largest numeric decrease (10,770) from the fall of 2016 to fall of 2017.

Nationally, public community college enrollment in 2017 was slightly higher than it was in 2007—before the impacts of the recession. Looking at the trends for all 50 states, 7 states reported fall enrollment at a lower rate in fall 2017 than was reported in 2007. Utah had the largest percentage decrease in enrollment with a difference of 26% fewer students (about 15,600 fewer students) in 2017 than reported in 2007; however it is important to note that this was in part due to colleges moving from community college status to predominantly baccalaureate degree granting status. Kentucky also had a large drop in enrollment (26% decrease) from 2007 to 2017. California had the largest drop in the number of students at 38,500 during this time period; however, it only represented a 3% drop in enrollment from their 2007 enrollment. Alaska also showed significant drops in enrollment over this time period, but that was largely due to the fact that colleges changed from community colleges to 4-year colleges in this timeframe—resulting in a decrease in community college enrollments for the state.

Of the states with higher enrollment in the fall of 2017 compared to 2007, Louisiana had the largest percentage net increase with 30% more students; however, fall 2007, enrollments in Louisiana were deflated as they had not rebounded from the effects of Hurricane Katrina in 2005. There were several other states that also had enrollments well above the pre-recession enrollment spike.

Maine's enrollment numbers were 23% higher in 2017 than in 2007—the next largest percentage gain. Of the other colleges that had higher 2017 enrollments than they did in 2007, Texas had the highest net gain in number of students at 140,100, which was 22% higher than 10 years earlier. Other states that had maintained enrollment rates above pre-recession levels were Colorado (20%), and North Dakota, South Dakota, and Florida, all at 19%,

Idaho bucked the national trend. While national enrollment increased between 2007 and 2010 by 16%, Idaho enrollments decreased by 10%, and while the national enrollment decreased by 12% between 2010 and 2017, Idaho saw an enrollment increase of 11%. Most of the enrollment increases for Idaho were between 2010 and 2014, as enrollment did decline in 2 years measured (2015 and 2016).

College Promise programs--programs that offer no cost for tuition and fees for a large percentage of entering community college students--have been introduced in several states. This report looks at Tennessee and Oregon, which have state-wide programs, to see if there is any evidence of enrollment impacts. In order to isolate the effect, the data used are the number of first-time in college students attending community colleges within the state.

As seen in Figure 16, first-time in college enrollment significantly increased from 2014 to 2015 (up 28%), the first year of the Tennessee Promise program, suggesting a significant impact to first-term enrollments across the state. However, overall fall enrollment between 2014 and 2015 only increased 0.5%. Since the initial enrollment spike, first-time enrollment has remained relatively level.

The impact is less clear in the Oregon data. First-time in college enrollment was increasing prior to the implementation of the Oregon Promise, but continued to rise following implementation in 2016.

## Community College Enrollment in Context

The previous section explored the recent trends in community college enrollments. As noted, the economy has a significant impact on the enrollment trends of community colleges. However, there are other trends that also impact the enrollments in community colleges. For this paper, two aspects were investigated. First, the number of students who attend postsecondary institutions and the factors that impact that, and second, where students choose to attend postsecondary institutions. In other words, 1) if fewer individuals attend a college or university, then there are fewer potential students available to attend community college and 2) if students attending postsecondary institution differentially choose to attend colleges other than community colleges, then that too can decrease the number of students attending community colleges.

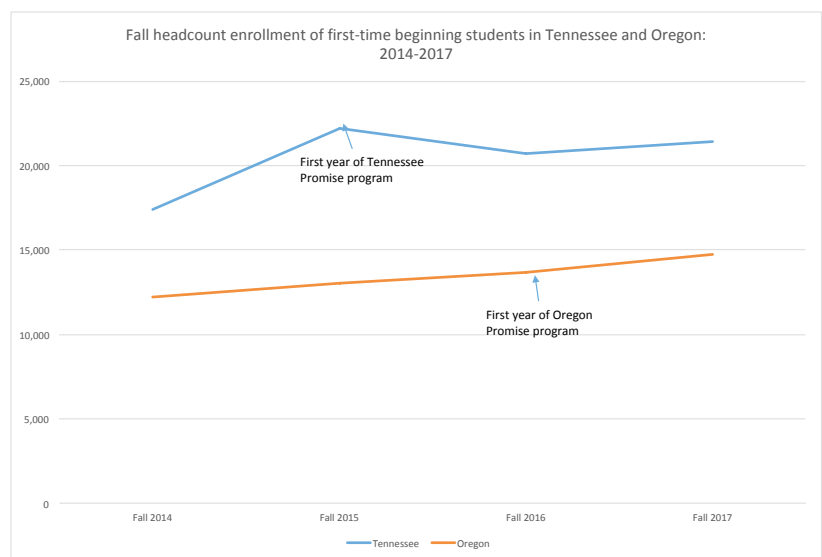


Figure 16

## Sector

To this point, this paper has focused on community college enrollment trends. In order to better understand these trends, it is important to also review enrollments in other sectors of higher education.

As with community college enrollment, total undergraduate enrollment in degree-granting postsecondary institutions peaked in the fall of 2010 at more than 18.5 million students. Enrollment since 2010 has slowly declined each year, down to around 17.1 million students in the fall of 2017.

Figure 17 shows the undergraduate enrollment trends for community colleges and all other degree-granting postsecondary education institutions<sup>vi</sup>. As demonstrated in the chart, enrollments in community colleges declined steadily after fall of 2010, while enrollments in the rest of postsecondary institutions—they remained relatively stable. These data suggest that enrollment in other sectors of postsecondary education were not affected to the same extent as the enrollments in community colleges between 2010 and 2017.

Figure 18 further explores these trends by separately looking at enrollment for different sectors of postsecondary education. By further delineating the data for non-community colleges, a clearer pattern of enrollment pre- and post-2010 emerges. From 2007 to 2010, community colleges and for-profit institutions had the largest increases in enrollment. Public and independent institutions did have enrollment increases during this period, but at a much slower rate of increase.

Public and independent, predominantly baccalaureate or higher-granting institutions, continued to show enrollment increases following 2010, while the for-profit sector and community colleges saw significant declines. Public baccalaureate or higher-granting colleges saw an increase of 6.4% between 2010 and 2017, and private, not-for-profit baccalaureate or higher-granting institutions saw a 6.5% enrollment increase in this same period. Of note, the enrollment in independent, predominantly baccalaureate or higher-granting institutions dipped slightly from 2015 to 2017, while enrollment in public 4-baccalaureate or higher-granting institutions continued to rise.

In community colleges, the enrollment from 2010 to 2017 dropped by a larger number than it did for for-profit institutions (944,800 compared to 938,500); however, as a percentage change, community colleges dropped 11.9% from their peak enrollment, while for-profit colleges enrollment decreased by half (50.4%) between 2010 and 2017.

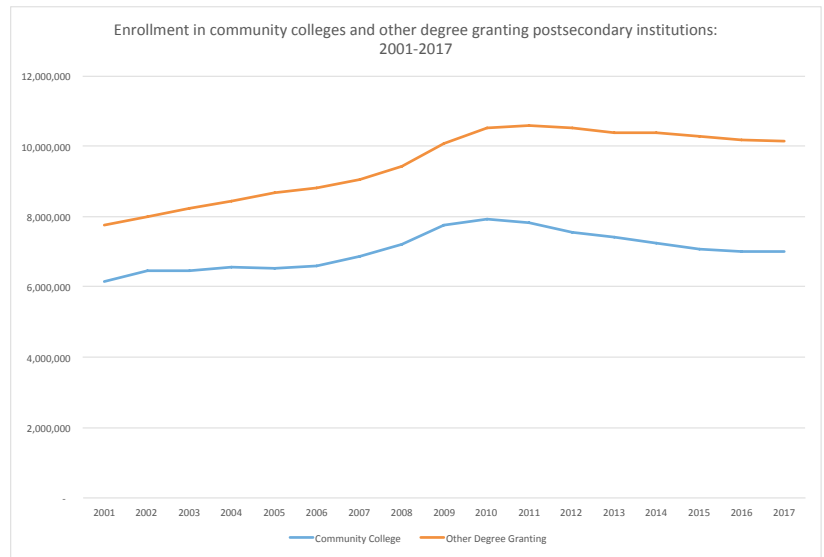


Figure 17

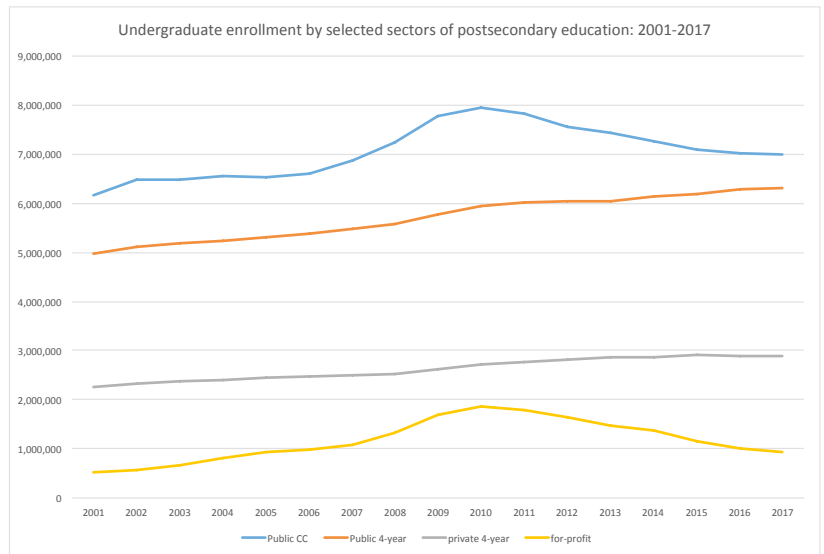


Figure 18



## High School Graduates

One source of new enrollments to postsecondary education are recent high school graduates. Several national demographic factors affect the number of students who graduate from high school, such as the number of individuals in that age group, and the rate at which they complete high school.

According to projections produced by NCES prior to the Great Recession, the number of students graduating from high school was projected to peak in the 2010-11 academic year and subsequently drop off. This projection was a reflection of the tail end of the baby boom echo who had reached 18 in the population<sup>vi</sup>. However, recently released data indicate that rather than the number of high school graduates decreasing following the class of 2010-11, the number of graduates actually increased in the two following years. (Figure 19).

The number of students graduating increased not because there were more students in the age group but, rather, because a higher percentage of students completed high school. The adjusted cohort graduation rate increased from 78% in 2009-10 to 84% in 2015-16 (NCES CCD data). As a result of these trends, the number of high school graduates available to enter postsecondary education from the fall of 2010 and the fall of 2017 remained fairly consistent.

To explore these data a bit more, it also is important to look at the college continuation rate of recent high school graduates. That is to say, of the students noted above who recently completed high school, how many continued on to a postsecondary education institution following their high school completion? Based on estimates from the Bureau of Labor Statistics (Figure 20), the college continuation

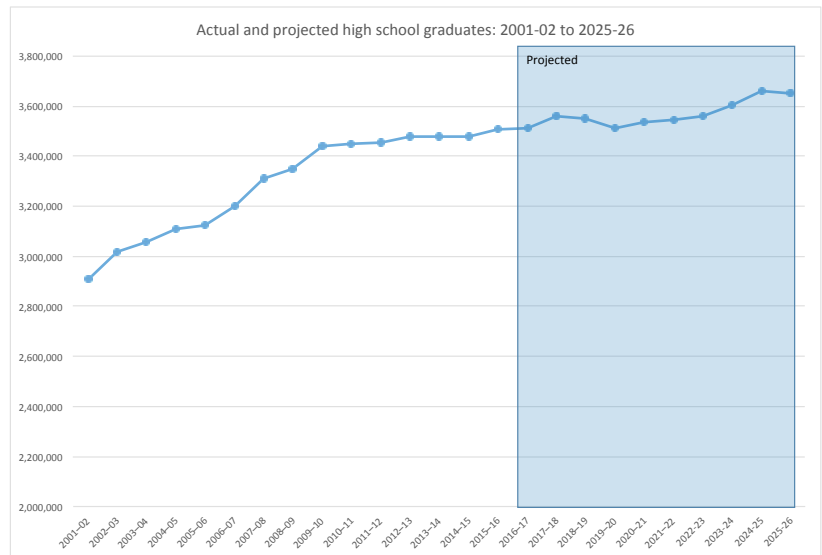


Figure 19

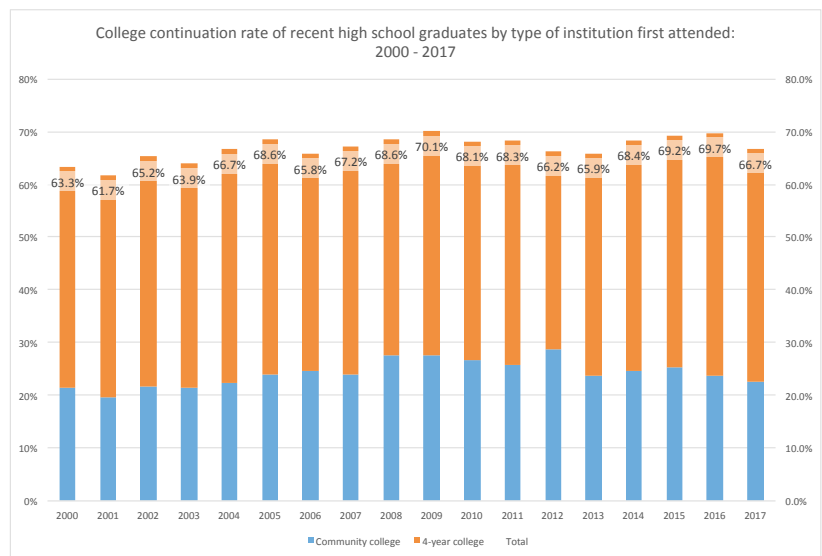


Figure 20

rate reached a high of 70.1% for students who graduated high school in 2009, and subsequently declined to 65.9 % in 2013, then fluctuated the three most recent years to 66.7% in 2017.

Taken together, the high school completion rates and college continuation rates suggest one potential relationship between overall college enrollments since 2010; however, they do not suggest a reason for the large decrease in community college enrollments. A review of data presented earlier (Figure 7) showed that for community colleges, full-time, 18-21-year-old student enrollment decreased following a high-point in 2009 and part-time, 18-21-year-old student enrollment decreased following 2011. The next section explores where students are first attending after completing high school.

## College Choice

As the data in the previous two sections indicates, public and private, not-for-profit, predominantly baccalaureate degree-granting institutions have continued to see increases in enrollments, while community college enrollments have declined. Since the pool of high school graduates has not decreased, and the college continuation rate has remained relatively high, the number of students graduating high school and continuing on to college cannot explain the decrease in community college student enrollments. The data would suggest that traditional-age students are choosing to begin in predominantly baccalaureate degree-granting institutions, rather than community colleges. To investigate this further, this report looks at the enrollment trends of first-time students (students enrolled for the first time following high school completion) over the 17-year time period.

Figure 21 shows the enrollment trend in raw numbers of the first-time students who started their postsecondary careers over the past 17 years. The graph indicates different trends for the community colleges and non-community college degree-granting institutions. Starting prior to the Great Recession, community colleges saw increases in first-time students between 2005 and 2009, but since 2009, community colleges have had a substantial decline in the number of first time college students enrolling each fall. Community colleges had approximately 358,800 fewer first-time students in 2017 than they had in 2009, while all other degree-granting institutions have remained relatively constant (200 fewer first-time students over the same time period). As of 2014, the number of first time-students attending community colleges had dropped below the number of first-time students in fall 2007, but 2017 first-time enrollments were still above 2006 levels.

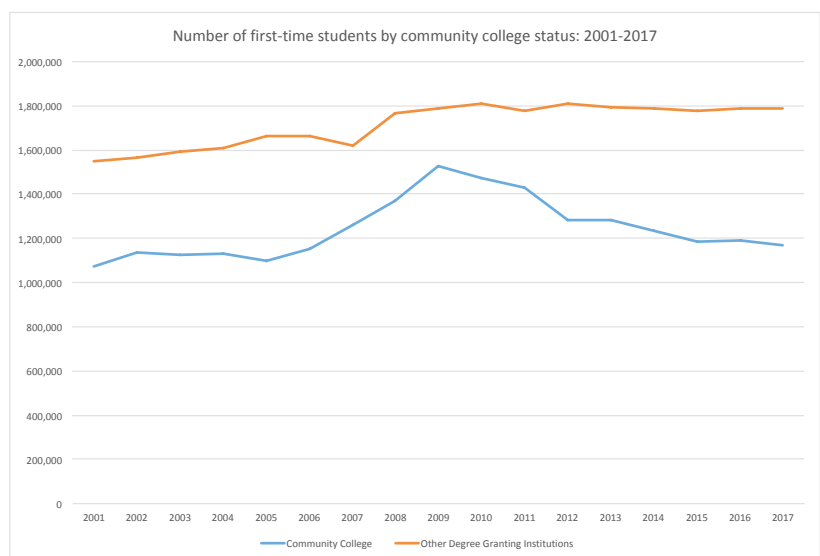


Figure 21

Figure 22 shows the same data, but as a distribution of first-time students between

community college and all other degree-granting institutions. These data indicate that the fall of 2009 saw the greatest percentage of students beginning their postsecondary education in community colleges (46.1%). However, by the fall of 2017 only 39.5% of first-time students were enrolling in community colleges.

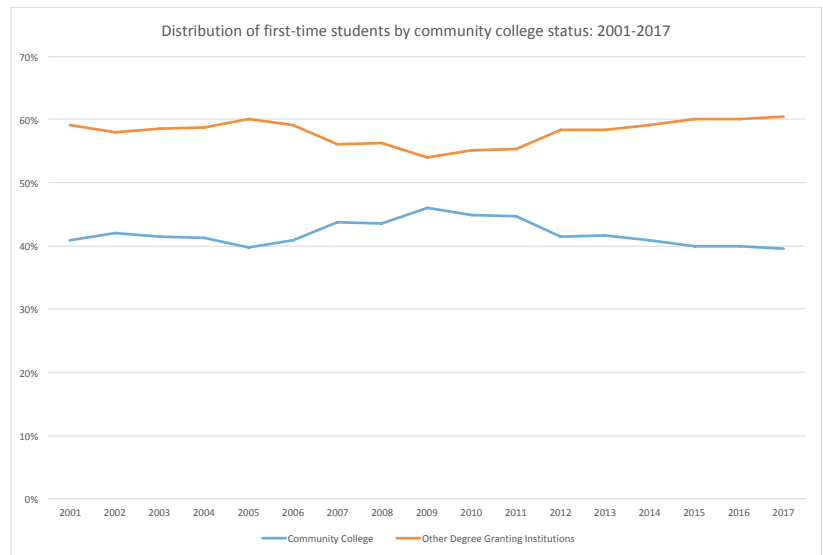


Figure 22

## Conclusion

Community colleges continue to see enrollment declines since their peak in 2010. The rate of decline appears to be slowing, but national fall headcount enrollment is now below where it was in 2007 preceding the Great Recession. Several trends are important to note in the years since community colleges saw their peak enrollment in 2010. First, while community college enrollments have been declining, enrollments at 4-year institutions (public and private) have been steady or increasing. Second, the rise of high school/dual enrollment students in community colleges has significantly increased, and without these students enrollment numbers would have dropped even more in community colleges. Third, the full-time enrollment has been decreasing even faster than the part-time enrollment, meaning the FTE enrollments (what many community colleges are funded on) is decreasing faster than total headcount enrollment.

<sup>i</sup>Fall 2018 enrollment figures are estimated based on analysis of enrollment trends reported in fall enrollment Snapshot reports produced by National Student Clearinghouse.

<sup>ii</sup>Full Time Equivalency (FTE) equates enrollment in terms of number of students taking a full academic load. For example, one full-time student and two half-time students would equal two FTE ( $1 + 1/2 + 1/2 = 2$ ).

<sup>iii</sup>Marken, S., Gray, L., and Lewis, L. (2013). Dual Enrollment Programs and Courses for High School Students at Postsecondary Institutions: 2010–11 (NCES 2013-002). U.S. Department of Education. Washington, DC: National Center for Education Statistics. Retrieved [date] from <http://nces.ed.gov/pubsearch>.

<sup>iv</sup>IPEDS definition of a non-resident alien is “A person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely.” From IPEDS Glossary.

<sup>v</sup>IPEDS definition of a First Time Student is “A student who has no prior postsecondary experience (except as noted below) attending any institution for the first time at the undergraduate level. This includes students enrolled in academic or occupational programs. It also includes students enrolled in the fall term who attended college for the first time in the prior summer term, and students who entered with advanced standing (college credits earned before graduation from high school).” From IPEDS glossary.

<sup>vi</sup>For purposes of this analysis, postsecondary institutions that do not award a degree (associate, baccalaureate, etc.) but only award postsecondary certificates were excluded from the analysis. Enrollment in non-degree granting institutions was less than 2% of all undergraduate enrollment in fall of 2015.

<sup>vii</sup>The growth in the population due to children of the Baby Boom generation.

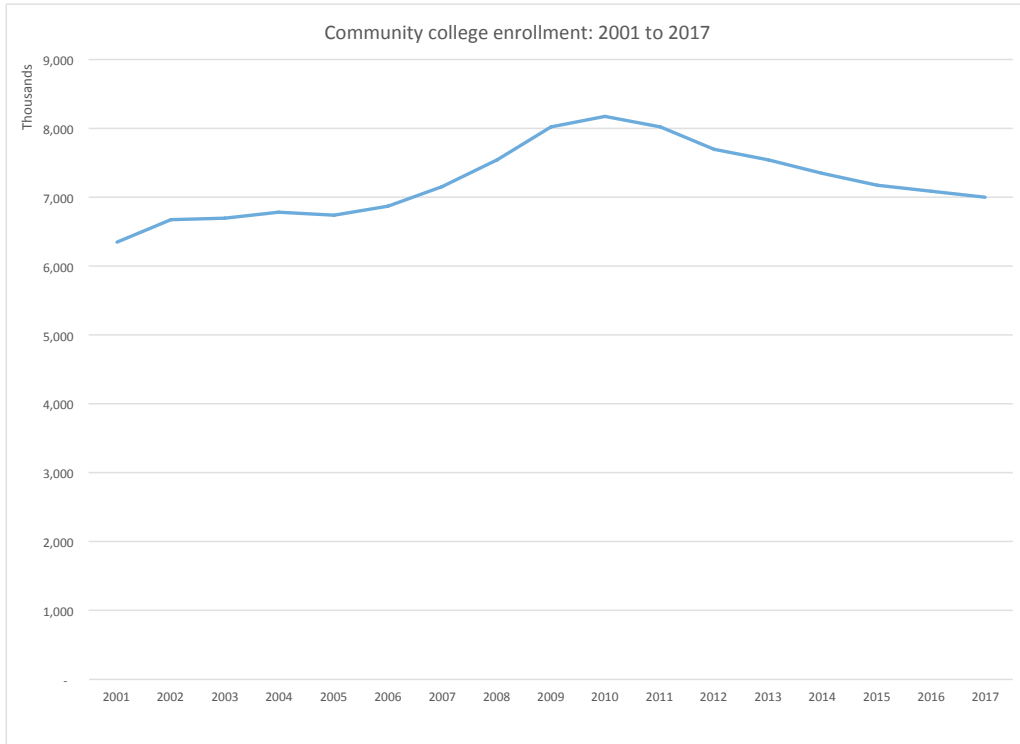


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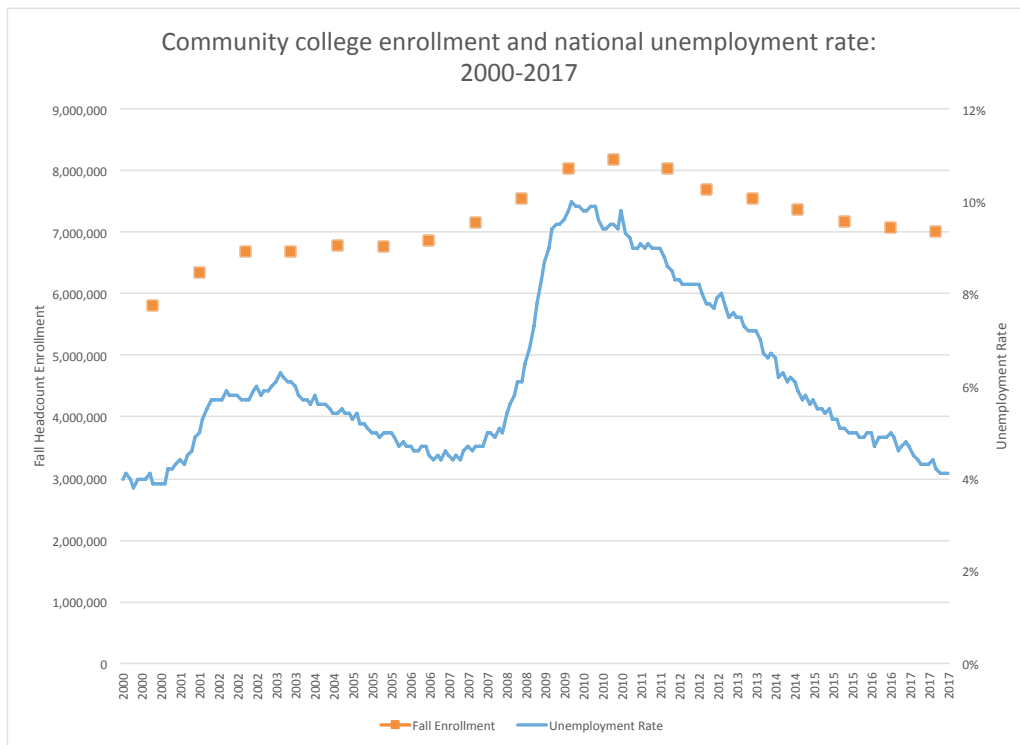


Figure 2

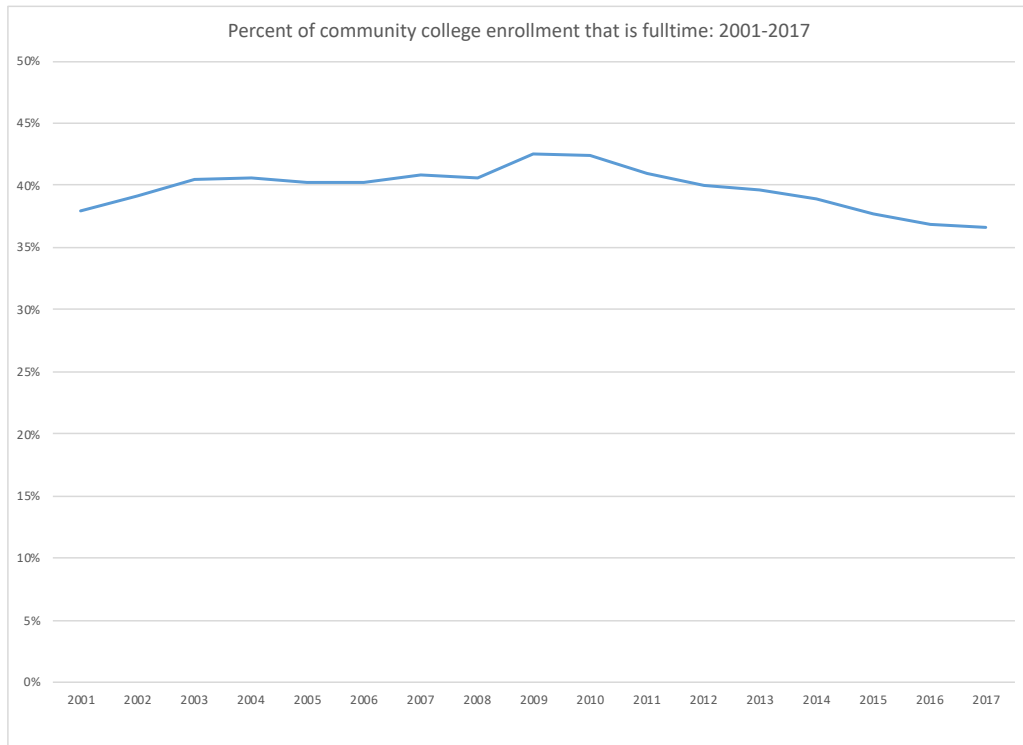


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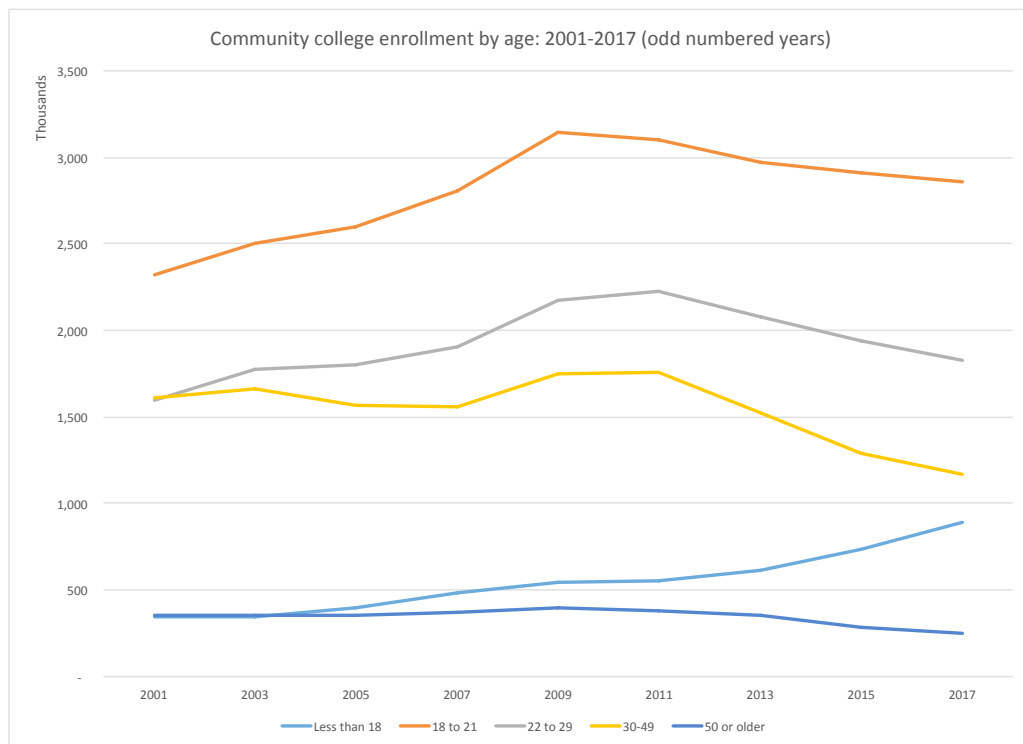


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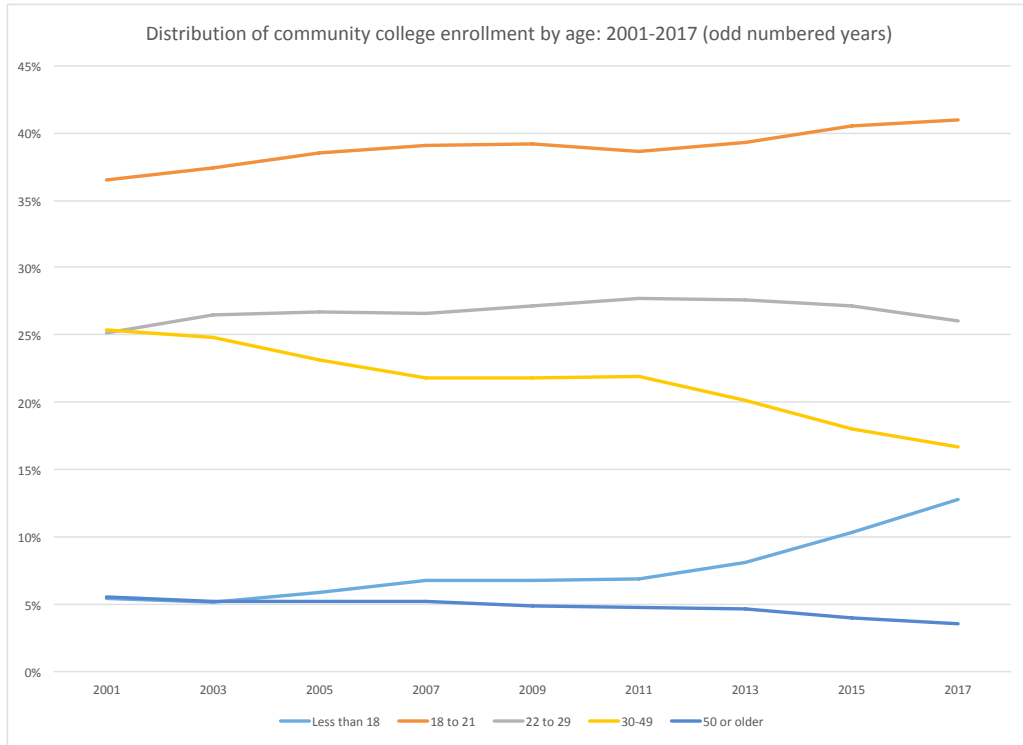


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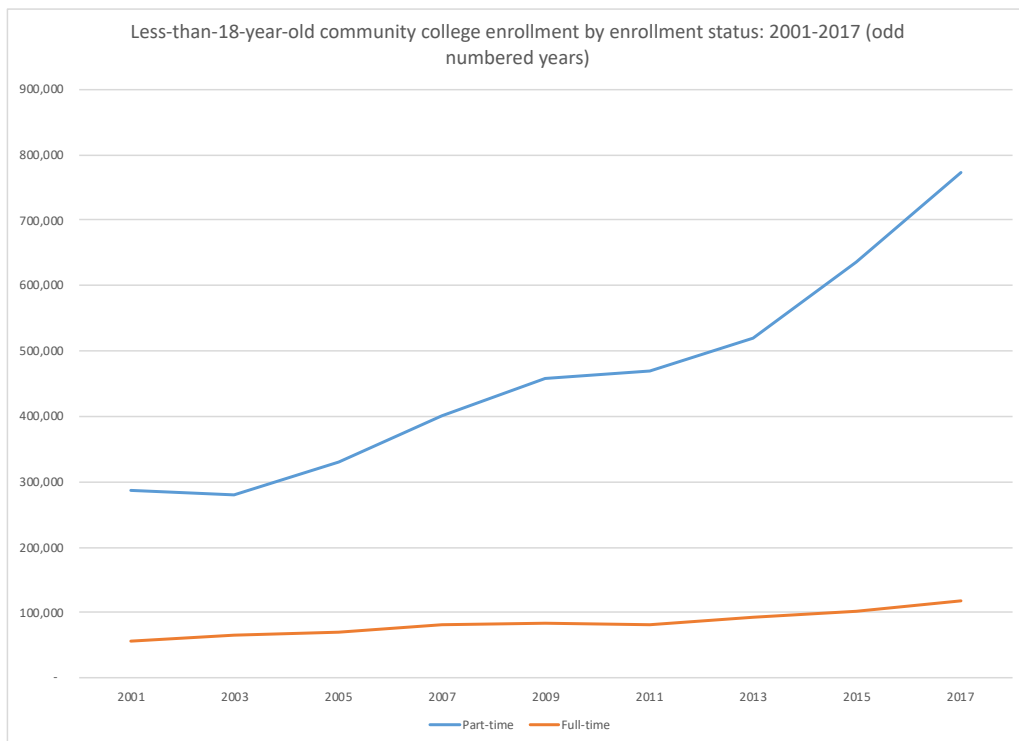


Figure 6



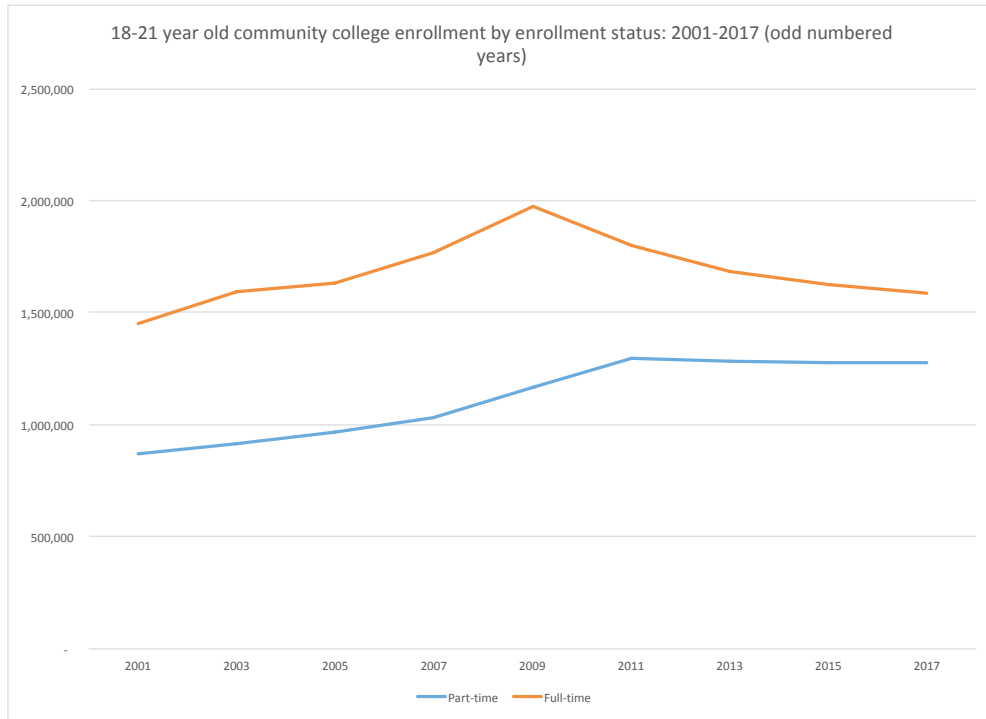


Figure 7

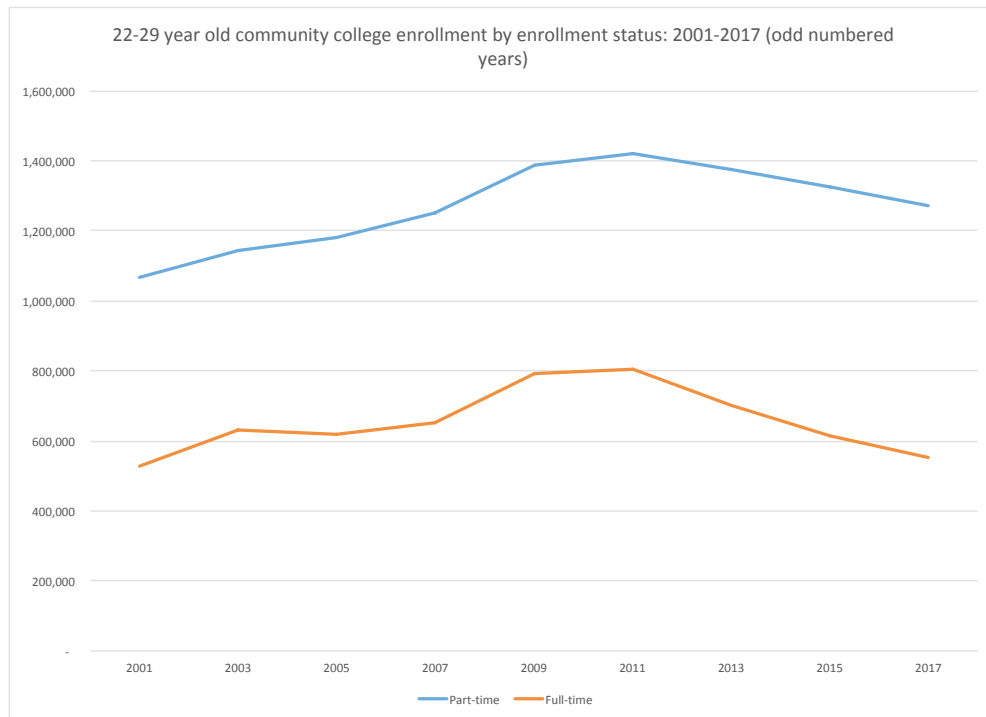


Figure 8

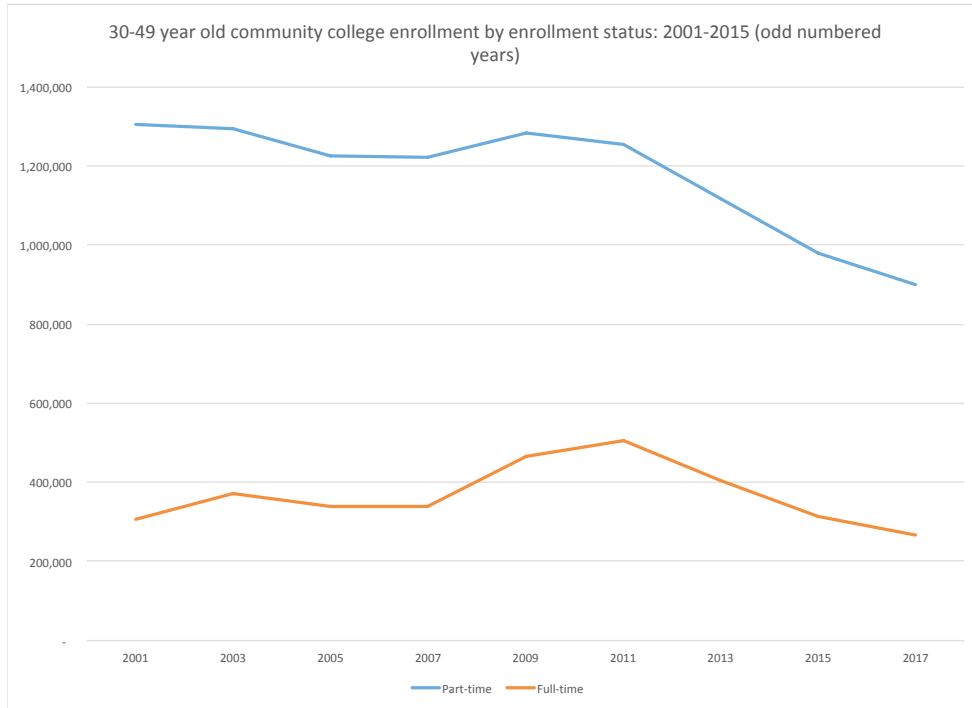


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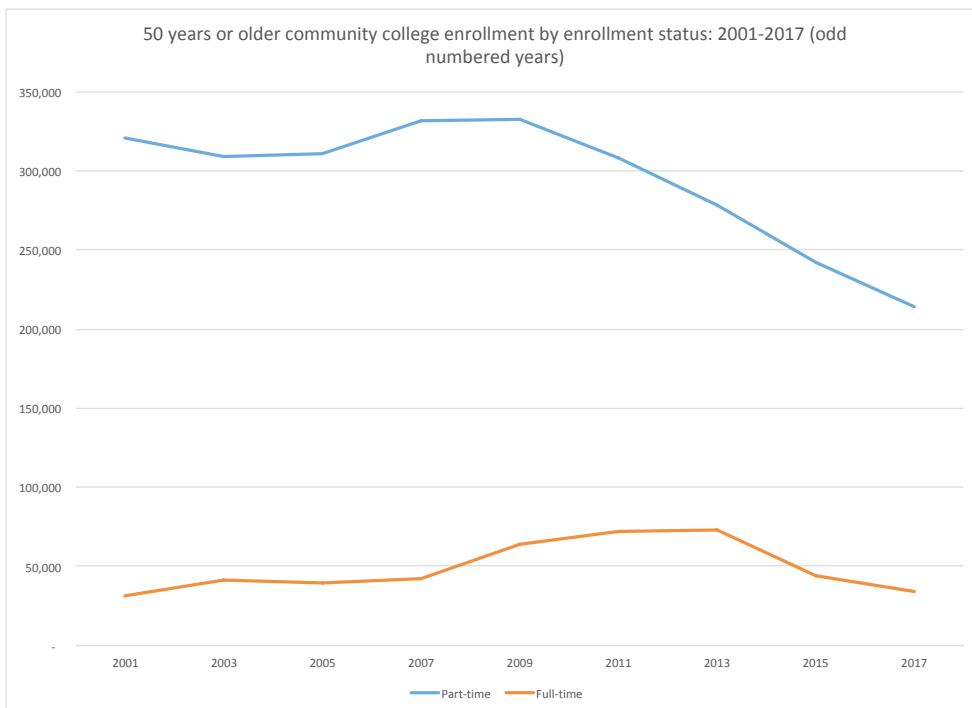


Figure 10

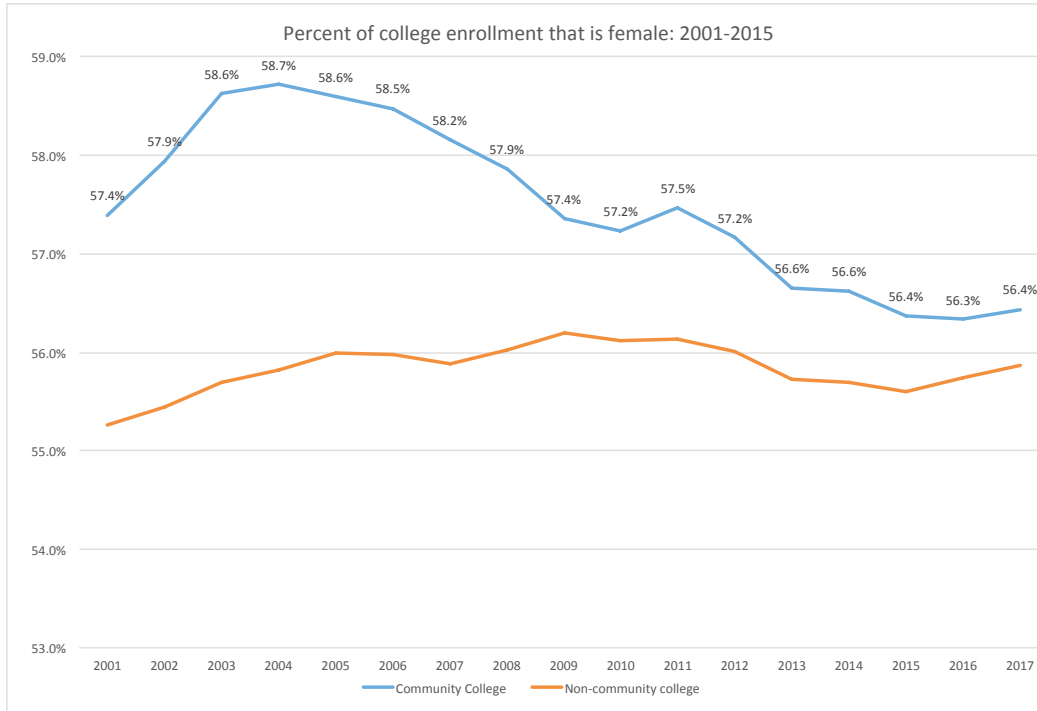


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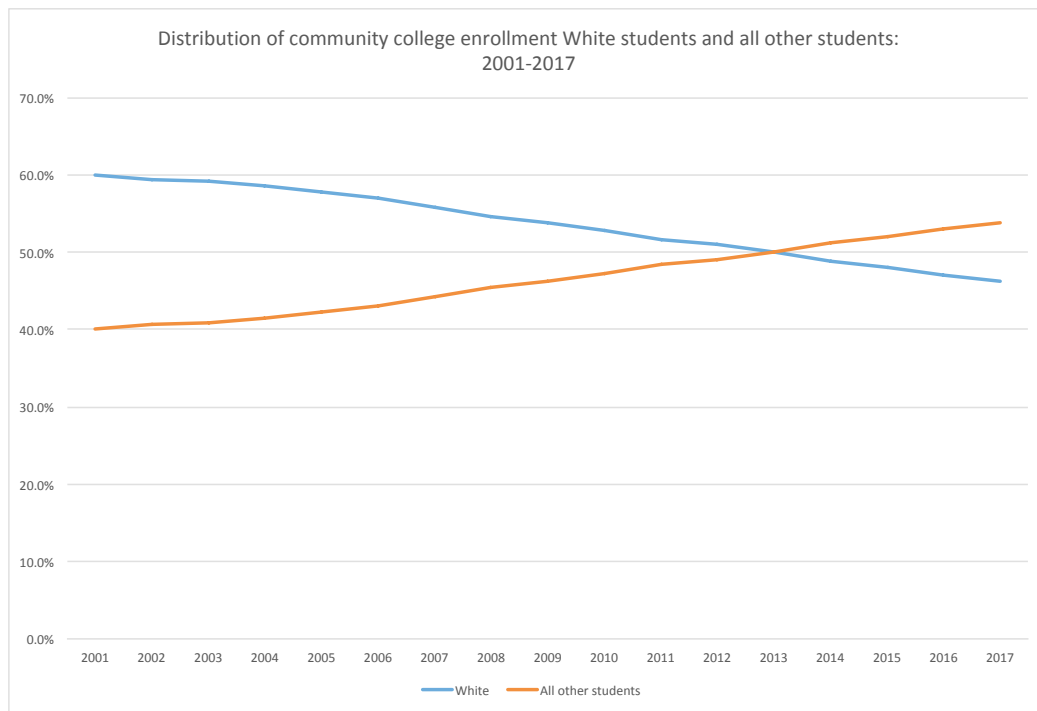


Figure 12

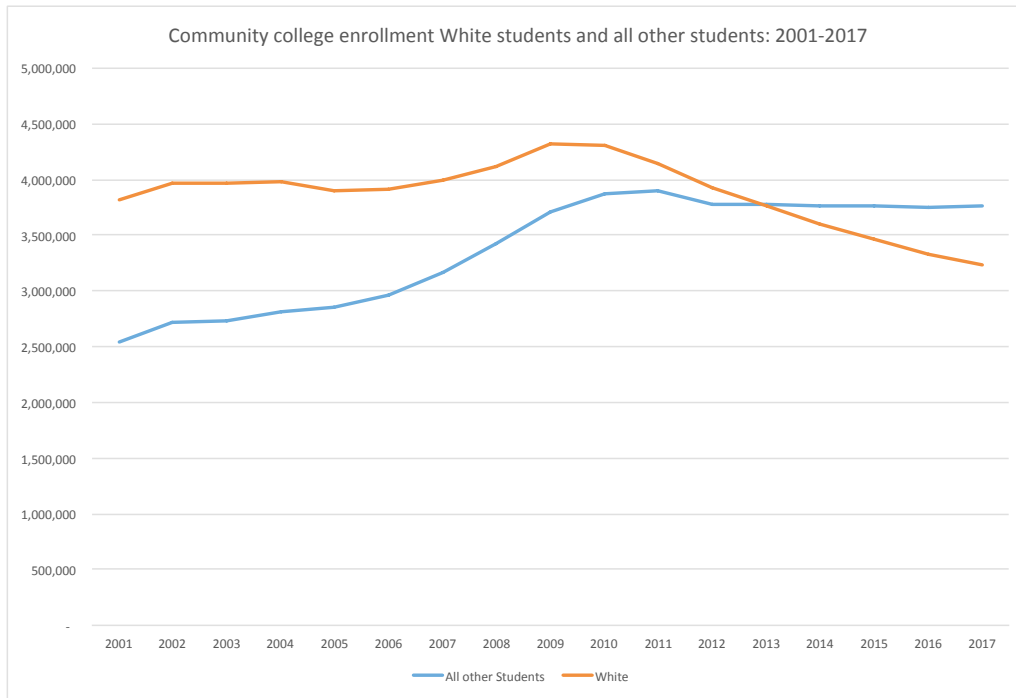


Figure 13

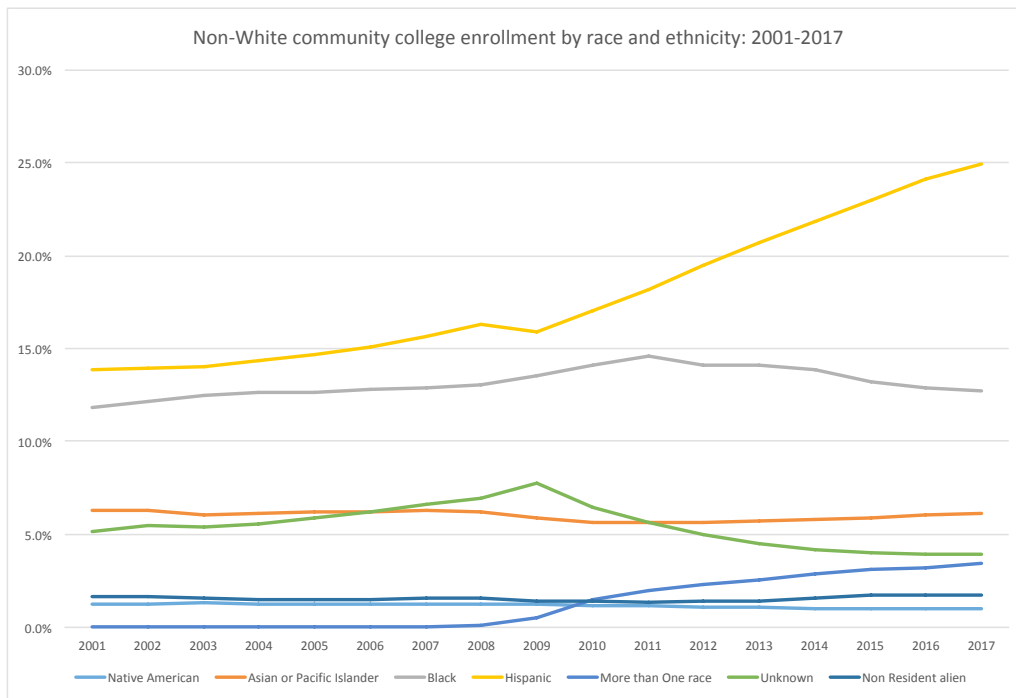


Figure 14

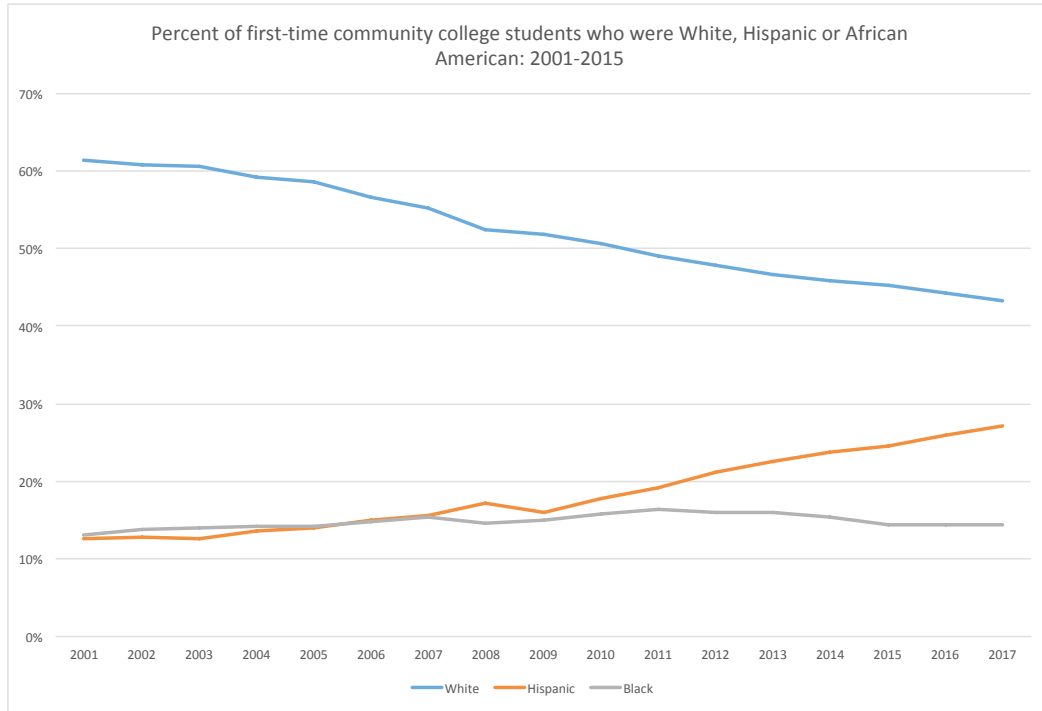


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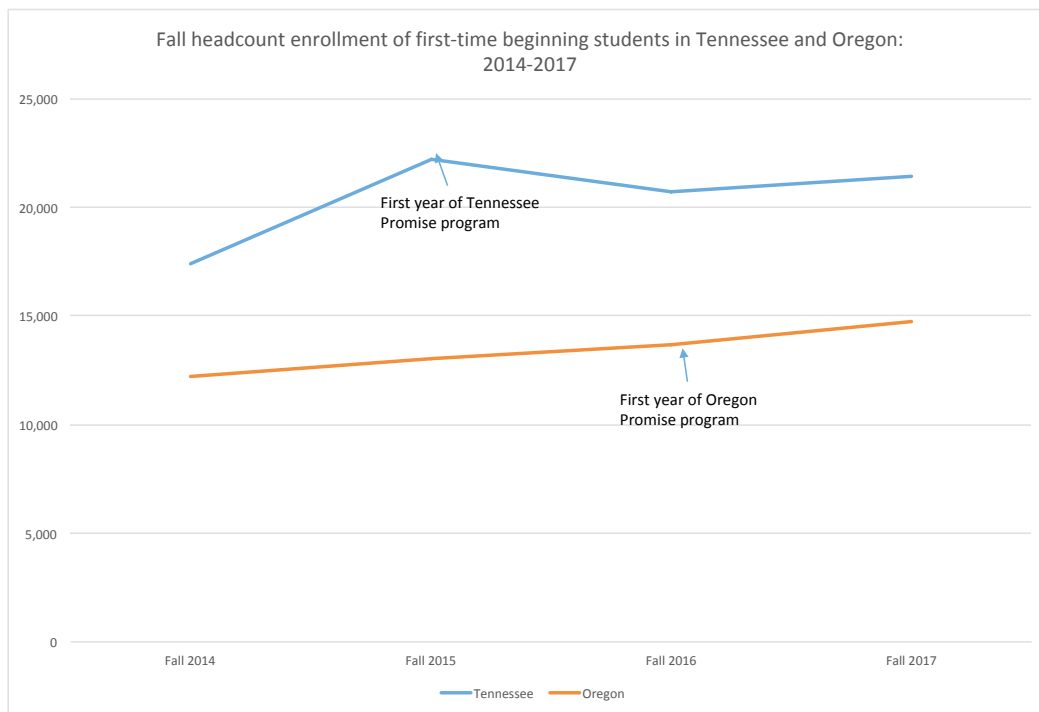


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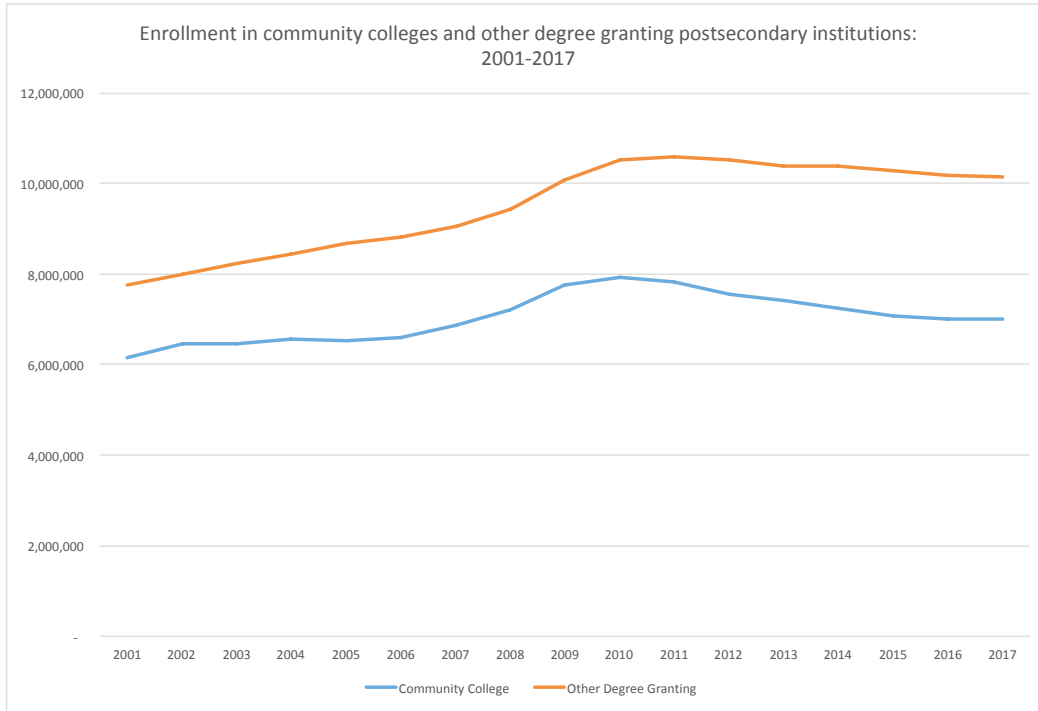


Figure 17

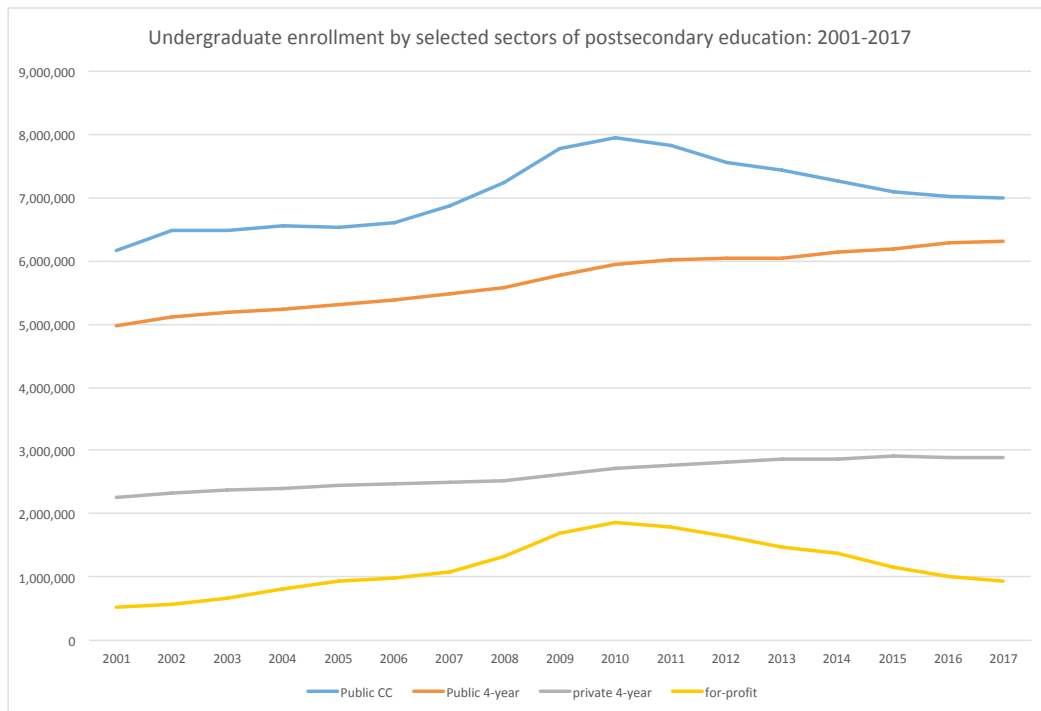


Figure 18



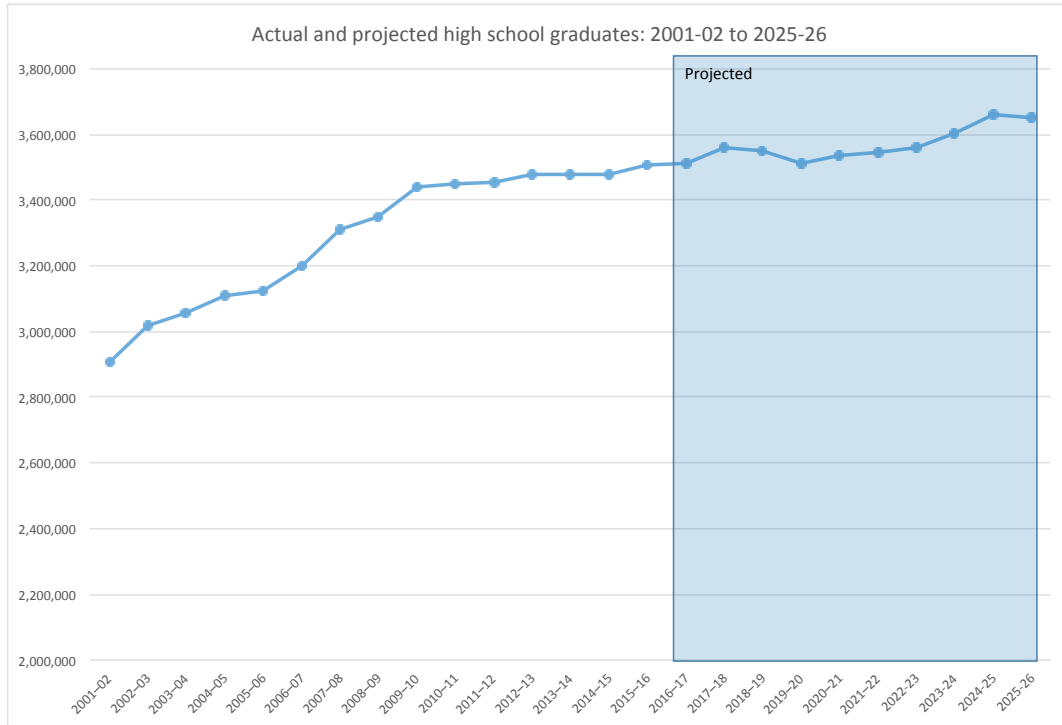


Figure 19

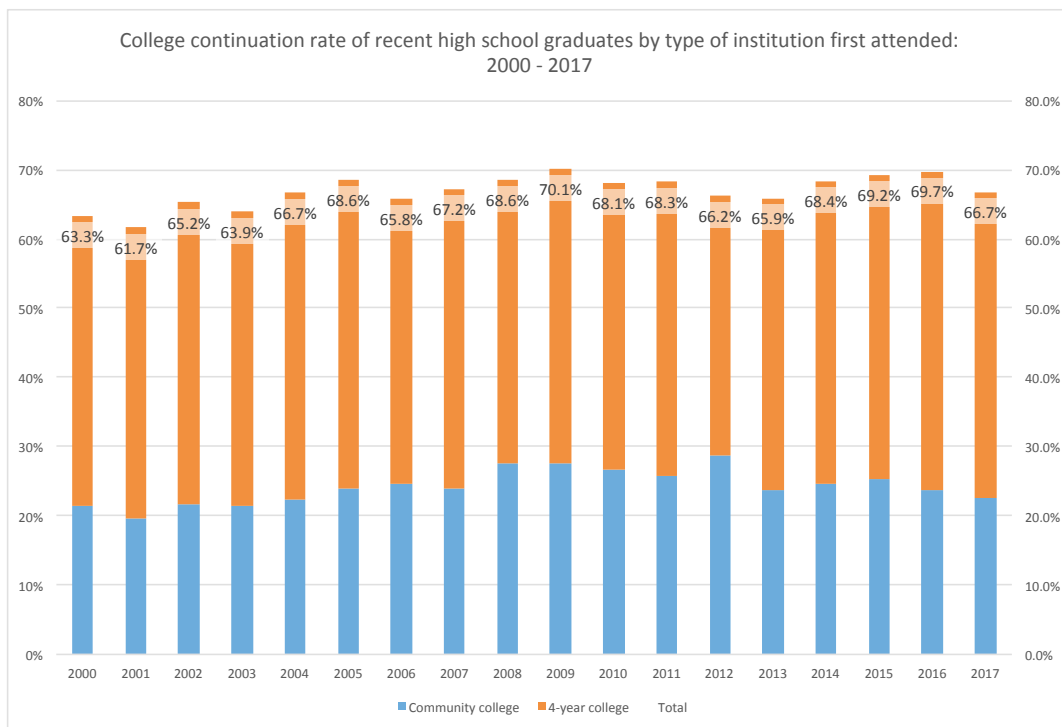


Figure 20

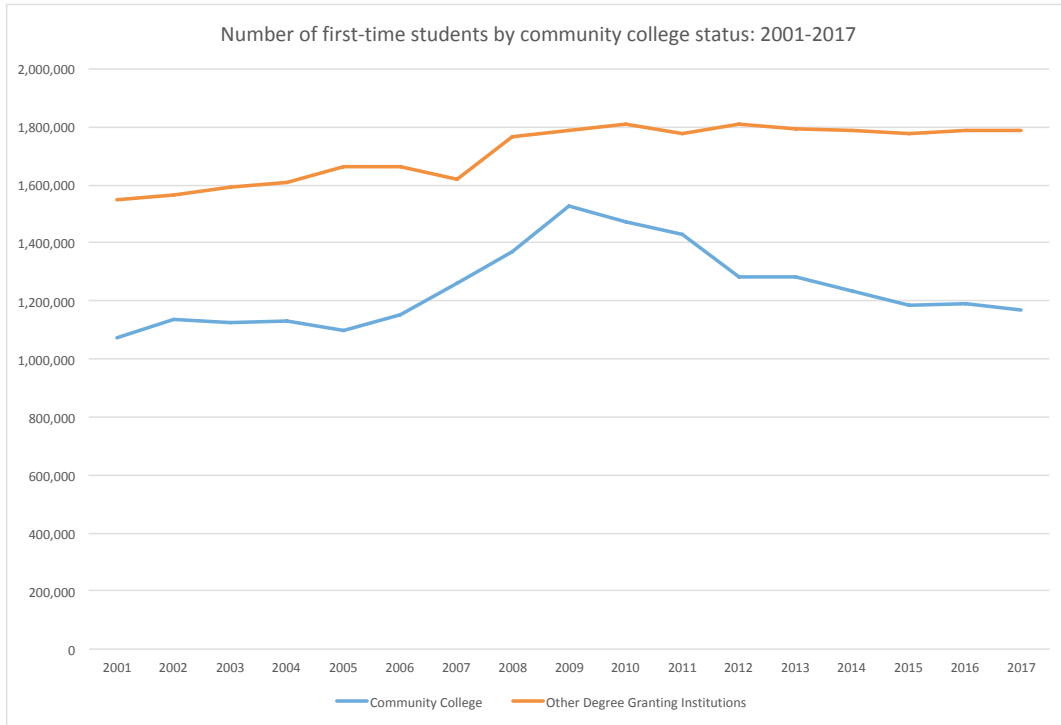


Figure 21

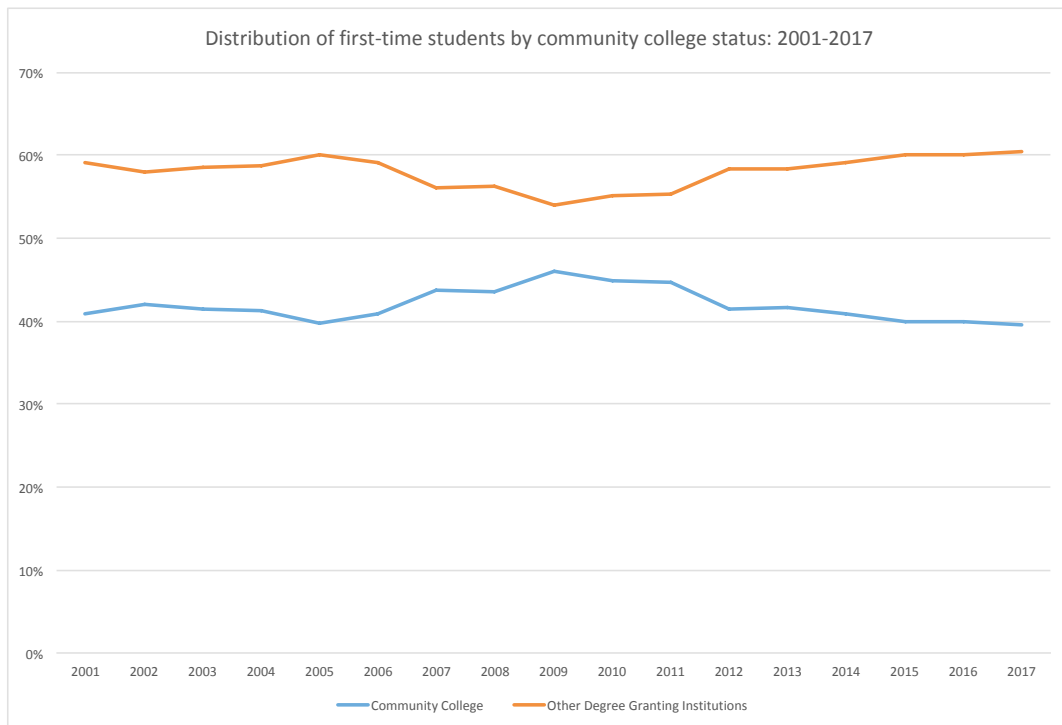





Figure 22



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