

Enrollment Trends Report

Utah Community College Study



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Executive Summary

The National Center for Higher Education Management Systems (NCHEMS) completed an analysis of enrollment trends across the Utah System of Higher Education (USHE), with a particular focus on community college-level education.

Amidst national declines in enrollment generally, we find that most Utah institutions have either increased or maintained enrollment. Those increases have been concentrated among young students, both those participating in concurrent enrollment and those recently graduated from high school.

We also find, however, that one USHE institution, Salt Lake Community College (SLCC), has experienced enrollment declines that mirror other similar institutions across the country. Additionally, enrollment of students often served by community colleges—students over the age of 25, part-time students, Pell-eligible students—has also decreased statewide.

Utah is similar to the nation in its growing concurrent enrollment, decrease in enrollment of students aged 25 and older, and decreases in enrollment in the community college sector. The state has countered national trends in its increase among students aged 18-24 and its growth at regional universities.

To be sure, population and economic trends are impacting enrollment trends in the state. Utah has an unusually robust supply of high school graduates, and the college-aged population is growing overall. Institutions in fast-growing areas of the state have experienced more rapid enrollment growth than those in other areas. However, the percentage of residents attending college is not increasing, and appears to be declining in some regions. Further, while Hispanic/Latinx students are growing as a share of Utah's population, institutions have not kept pace with increasing enrollment of Hispanic/Latinx students.

This report provides data and evidence to inform conversations about enrollment within the USHE system, and will be followed by a second report that assesses community college services within the state.

Introduction

In late 2022, the Utah System of Higher Education (USHE) contracted with the National Center for Higher Education Management Systems (NCHEMS) to conduct a study funded by the Utah Legislature “to analyze current community college-related educational services and identify long-term strategies that address Utahns' ability to access an affordable, accessible, and workforce aligned postsecondary education.”

One of the requirements of this study is to provide insight into enrollment trends among Utah’s 16 public postsecondary institutions. Enrollment at Utah institutions has been uneven in recent years; it has declined in some areas and at some institutions while increasing in others. This report seeks to illuminate those trends and explores potential reasons behind them. This report supports the goals of the larger community college study.

Background

The Utah System of Higher Education (USHE) includes 16 public postsecondary institutions: eight degree-granting colleges and universities and eight technical colleges. Distinguishing between the institutions classified as degree-granting institutions and those classified as technical colleges is straightforward, as the technical colleges have a separate governance history, a distinct accreditor, and do not offer degrees.

However, there is considerable diversity within the group of degree-granting institutions, and Utah's mix of institutions is substantially different than that of other states. While some state higher education systems define a subset of two-year colleges and a distinct subset of four-year colleges, the USHE system assigns various different roles to different institutions.¹ Notably, Utah only has two official community colleges. It conducts much of its certificate-level technical education at the standalone technical colleges and includes Associate's-level education in the "Regional University" role. Utah's four regional universities are often referred to as "dual mission" institutions because, unlike the majority of institutions nationwide, they offer education both above and below the Baccalaureate level. In fact, some of the institutions within the system also identify as “tri-mission” given that they award certificates, Associate’s degrees, and Bachelor and graduate-level degrees. The lack of a bright line between 2-year and 4-year institutions creates ambiguity but also opens opportunities for Utah to design a flexible and nimble statewide system of higher education.

For the purposes of this report, we analyze enrollment trends across the entirety of the USHE system, given that *all* types of Utah institutions (research universities, regional universities, technical colleges, and community colleges) offer education and services that fall within the purview of community colleges in other states, and which contribute towards affordable, accessible, and workforce-aligned postsecondary education across Utah. We do frequently distinguish between the degree-granting institutions and the technical colleges, given their differences in how enrollment and completion are measured.

This Enrollment Trends Report is the first deliverable from a larger project that seeks to understand the extent to which Utah's public institutions are successfully carrying out all aspects of the community college mission across the state. Understanding the trends in which kinds of students are enrolling at which institutions in which locations is one important component of the project. Throughout this report, we focus on headcount enrollment (rather than credits, full-time equivalents, or membership hours), because we are focused on *access* as a primary component of the community college mission; we examine the characteristics of students enrolling in college and how those characteristics are changing over time. We also focus this report specifically on community-college

¹ Utah System of Higher Education, <https://ushe.edu/institutional-missions-roles/>

related enrollment; this means undergraduate education, with special attention paid towards freshmen and sophomores as well as audiences typically served by community colleges, such as high school students participating in concurrent enrollment and adult students over age 24. For reference, the array of typical community college services and audiences is shown in Figure 1. It is worth noting that, though noncredit programs and students are important to the community college mission, USHE does not have complete data on noncredit enrollments, and they are therefore not analyzed in this report. In this regard, Utah is not unlike other states; noncredit activity is generally not carefully measured, although efforts to do so are mounting.

Figure 1. The Array of Community College Services and Audiences

		Audiences/Clients			
		In-School Youth (Secondary Education)	Recent High School Graduates	Adults	Employers
Services	Remedial & Developmental Education				
	General Education				
	Transfer Preparation				
	Career Preparation (including workforce oriented Associate's degrees, certificates, and non-credit)				
	Customized Training, Rapid Response Workforce Development				
	Community Service (Non-Credit and Other Services)				
	Brokering and Serving as a Delivery Site for Other Providers				
	Low-Cost Education				

National Enrollment Trends

Nationally, postsecondary enrollment decreased significantly during the COVID-19 pandemic, with particularly acute decreases in the community college sector. According to the National Student Clearinghouse, while 6.0 million students across the country were enrolled in public two-year institutions in 2017, 4.5 million enrolled in 2022.²

This sharp pandemic-related decrease came on the heels of a decade of steady decline in nationwide college enrollment. That longer-term decrease was also focused on the community college sector; while enrollment at public, 2-year institutions declined by over 35% from 2010 to 2020, public 4-year institutions' enrollment increased by 15% during the same period.³

College participation rates, or the percentage of the population enrolled in postsecondary education, have also decreased. In October 2022, 62% of 2022 high school graduates ages 16 to 24 were enrolled in colleges or universities. In 2018, the percentage had been 69%.⁴

² National Student Clearinghouse Research Center, <https://nscresearchcenter.org/current-term-enrollment-estimates/>

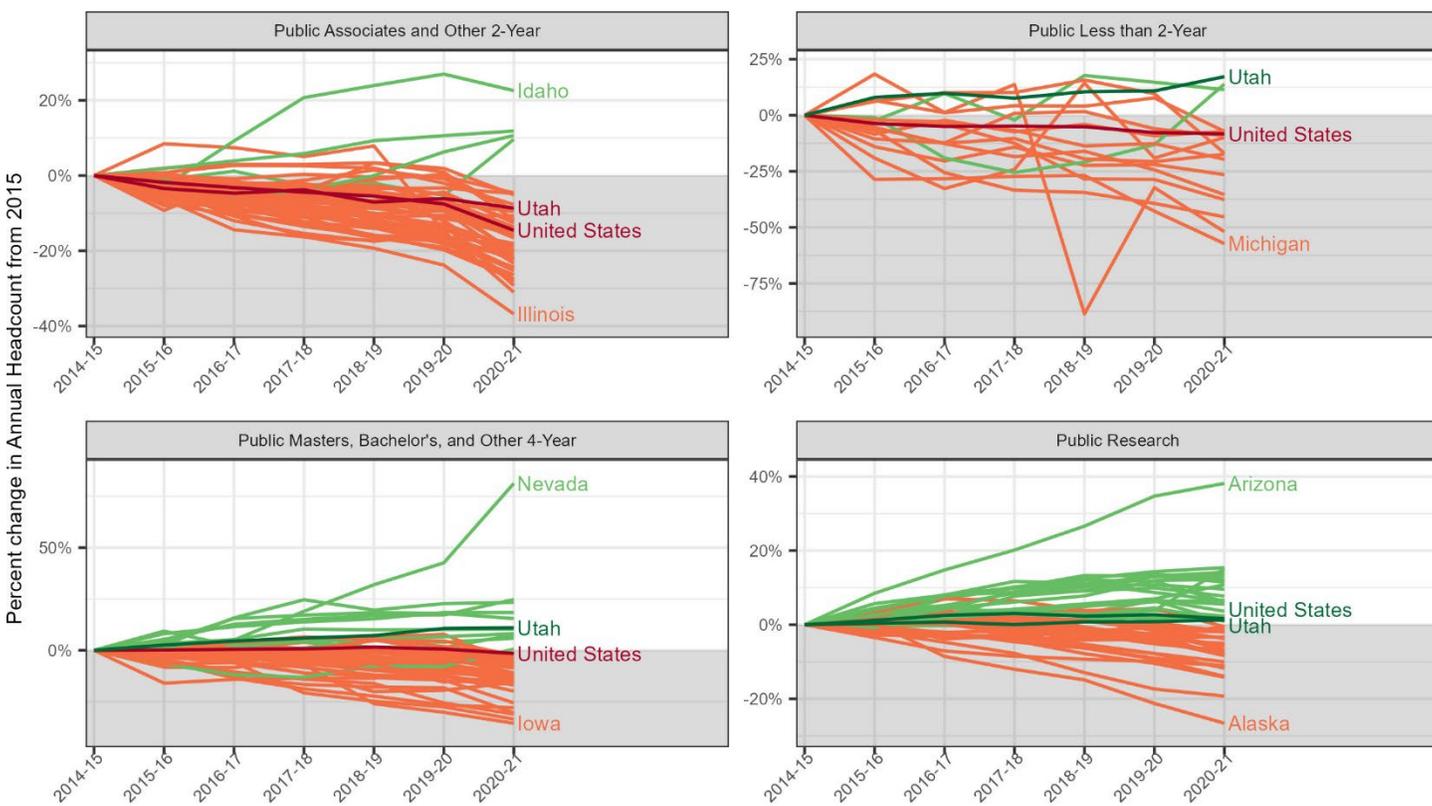
³ IPEDS Trend Generator, <https://nces.ed.gov/ipeds/TrendGenerator/app/trend-table/2/2?trending=column&rid=1>

⁴ U.S. Bureau of Labor Statistics, <https://www.bls.gov/news.release/hsgec.htm>

Utah enrollment has been an exception to this trend. From 2017 to 2021, total fall postsecondary enrollment across the state climbed steadily, except for a 1% dip in 2021 that was reversed in 2022.⁵

Figure 2 shows sector-by-sector trends in undergraduate enrollment at the nation's public institutions from the 2014-15 academic year through 2020-21. Utah stands out in several ways. First, though declines in the 2-Year community college sector have taken place across the country, Utah's declines have been slightly less steep compared to those of most other states. Second, Utah was one of only a handful of states that grew enrollment at its public comprehensive (regional) universities from 2015 to 2021. Finally, Utah's Less-than-2-year (technical) colleges grew by a larger percentage than any other state. That sector's enrollment appears more volatile because numbers tend to be small. Utah enrolls the most students in public, less-than-2-year institutions of all the states; Utah's enrollment alone accounts for nearly one-quarter of all the U.S. enrollment in that sector.

Figure 2. Annual Undergraduate Headcount at Public Institutions, by State and Sector



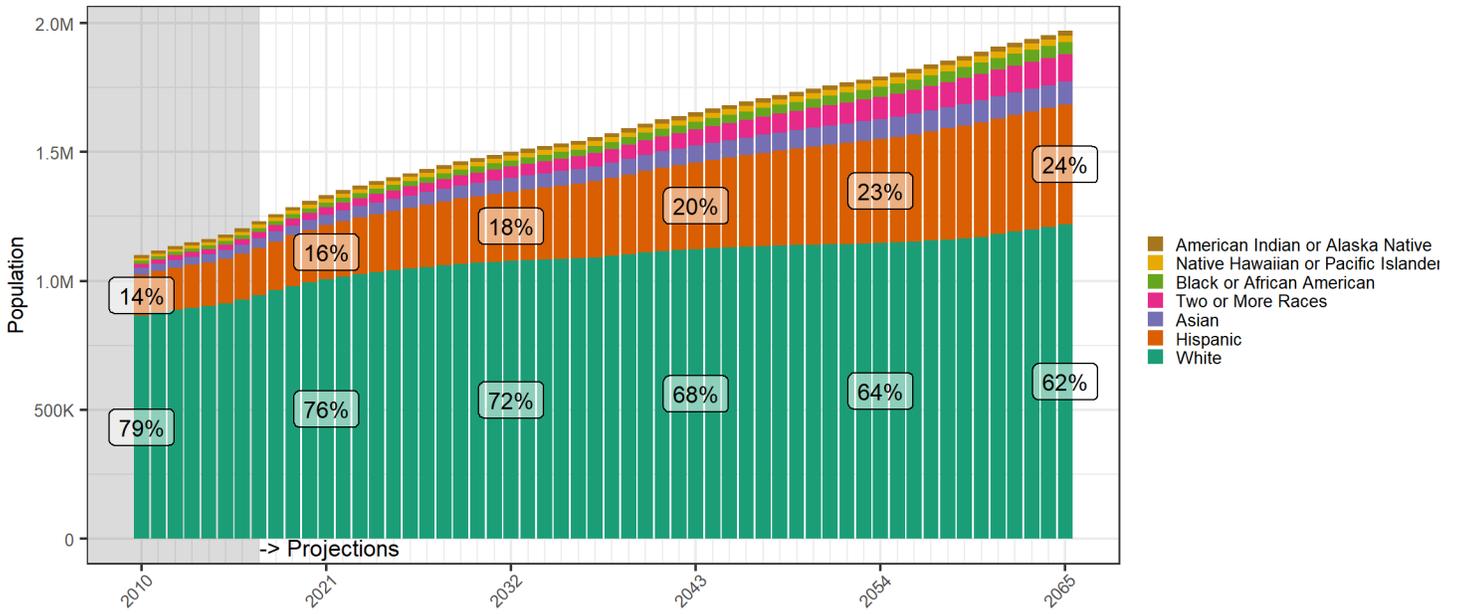
Source: NCES IPEDS Annual Enrollment Survey, files effYYYYY. Notes: Each line represents one state. Only includes undergraduates at public institutions. States are only displayed that enrolled an annual average of at least 500 students in a given sector.

Utah Population Trends

Like its postsecondary enrollment, Utah's population is growing. Over time, that growth among the college-going age group of those aged 18 to 44 is expected to continue, and the population is expected to become more racially and ethnically diverse (Figure 3). In particular, Hispanic or Latinx people are expected to make up an increasingly large share of the population.

⁵ National Student Clearinghouse Research Center, <https://nscresearchcenter.org/current-term-enrollment-estimates/>

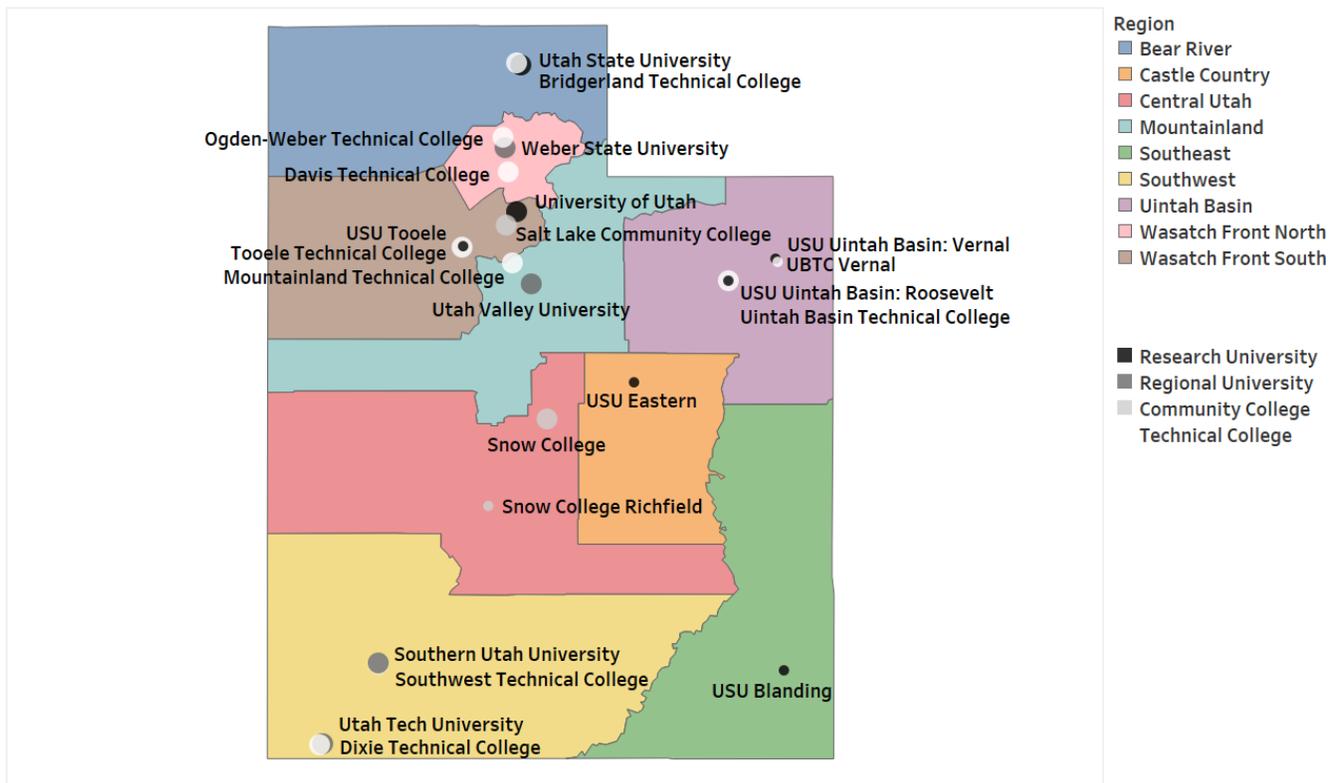
Figure 3. Projected Utah Population Age 18-44, by Race/Ethnicity



Source: Kem C. Gardner Policy Institute

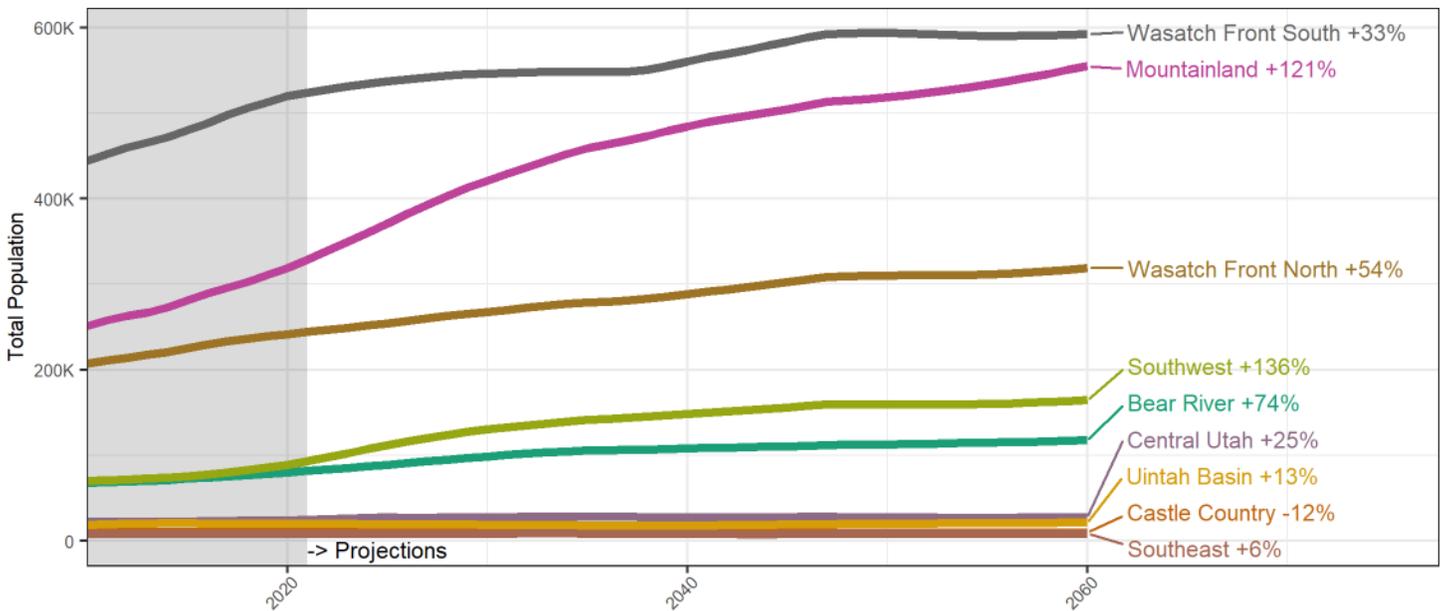
Beyond statewide trends, there are differences between regions that have importance to college enrollment. Throughout this report, we examine population and participation data according to regions defined by the Utah Department of Workforce Services. These regions, along with each USHE institution's main campus and several additional campuses of note, are mapped in Figure 4.

Figure 4. Utah Workforce Regions and USHE Postsecondary Institutions



All regions of the state are increasing in population among the college-going age group of 18 to 44, though the Southwest and Mountainland regions are growing more rapidly than other areas (Figure 5). The population of this age group is projected to continue to grow over time.

Figure 5. Projected Utah Population Age 18-44, by Region



Source: Kem C. Gardner Policy Institute.

The story is somewhat different for the sub-population aged 18 to 24, which represents a younger "traditional" college-aged group. Across the state, the population of this age group is projected to increase during the 2020s, but then decline until the mid-2040s before growing again. Additionally, this population will not grow as rapidly as other age groups, and is expected to comprise a smaller share of Utah's total population over time.⁶

It is in a context of nationwide enrollment decline, statewide enrollment and population growth, and demographic change, that we examine Utah's enrollment trends in more detail. In this report, we examine the discrepancies in current enrollment trends among Utah institutions that participate in serving the community college mission. We find that the statewide numbers mask significant variation among individual institutions. While some institutions have enjoyed enrollment increases, others have maintained relatively static enrollment levels, and one —Salt Lake Community College (SLCC)—has experienced recent and significant enrollment decline. In the sections that follow, we provide a more detailed analysis of these trends, as well as several potential underlying drivers.

Overview of Enrollment Trends

In this section, we provide an overview of recent statewide and institution-level enrollment trends. We find that:

- While most Utah institutions have bucked national trends and either increased or maintained stable enrollment, Salt Lake Community College has experienced enrollment declines.
- Overall enrollment in the state's technical colleges has increased in aggregate, but trendlines are much more variable at the institution level.

⁶ Kem C. Gardner Policy Institute, <https://gardner.utah.edu/blog-the-future-of-utahs-school-and-college-age-population/>

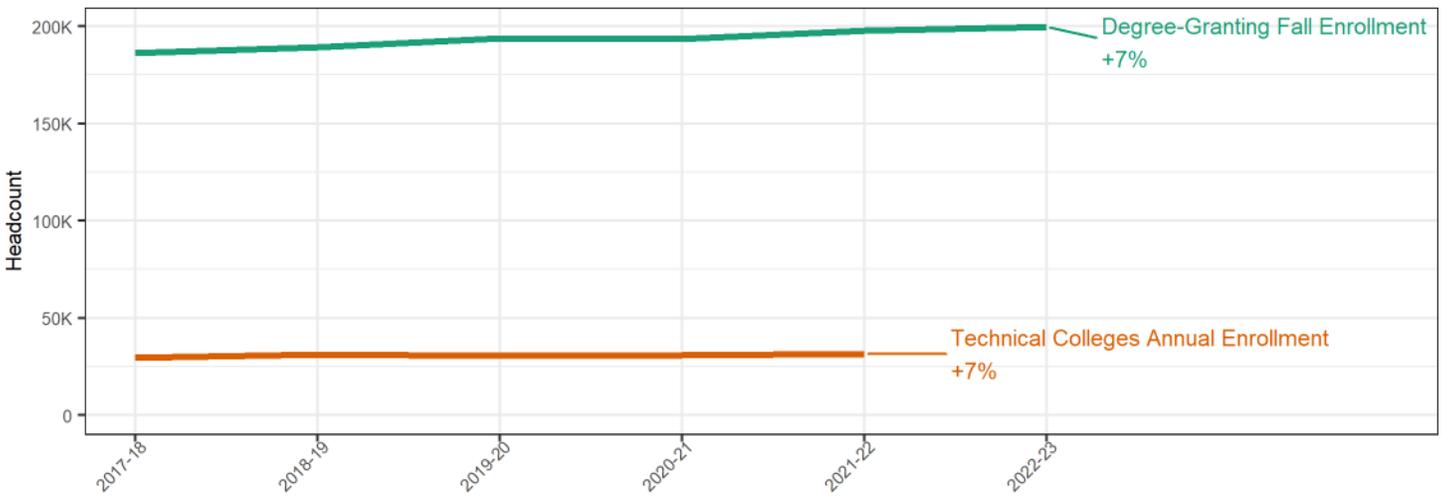
- While enrollment of undergraduate students under the age of 25 has increased, enrollment of students 25 or older has decreased, in many cases sharply.
- Full-time enrollment has increased slightly while part-time enrollment (excluding concurrent enrollment) has decreased.
- The number of non-Pell-eligible students has increased across the state, while the number of students eligible to receive Pell Grants has declined.
- Utah students tend to stay close to home; most Utah institutions in all sectors enroll most of their students from locations close to their campus(es). Counties where postsecondary institutions are located tend to have higher participation rates; participation rates are *not* generally higher in urban counties compared to rural ones.
- The largest area of growth at degree-granting institutions has been in concurrent enrollment of high school students, which at some institutions has offset enrollment declines among other student populations.

In the sections below, we provide additional data and analysis to support these findings.

Enrollment from 2017-18 to 2022-23

Total headcount enrollment (including undergraduate students, graduate students, and high school students) at Utah's public institutions of higher education has generally increased over the past five years. Below, Figure 6 illustrates that both degree-granting institutions and technical colleges have experienced a 7% increase in enrollment since the 2017-18 year.

Figure 6. Total USHE Headcount Enrollment from 2017-18 to 2022-23

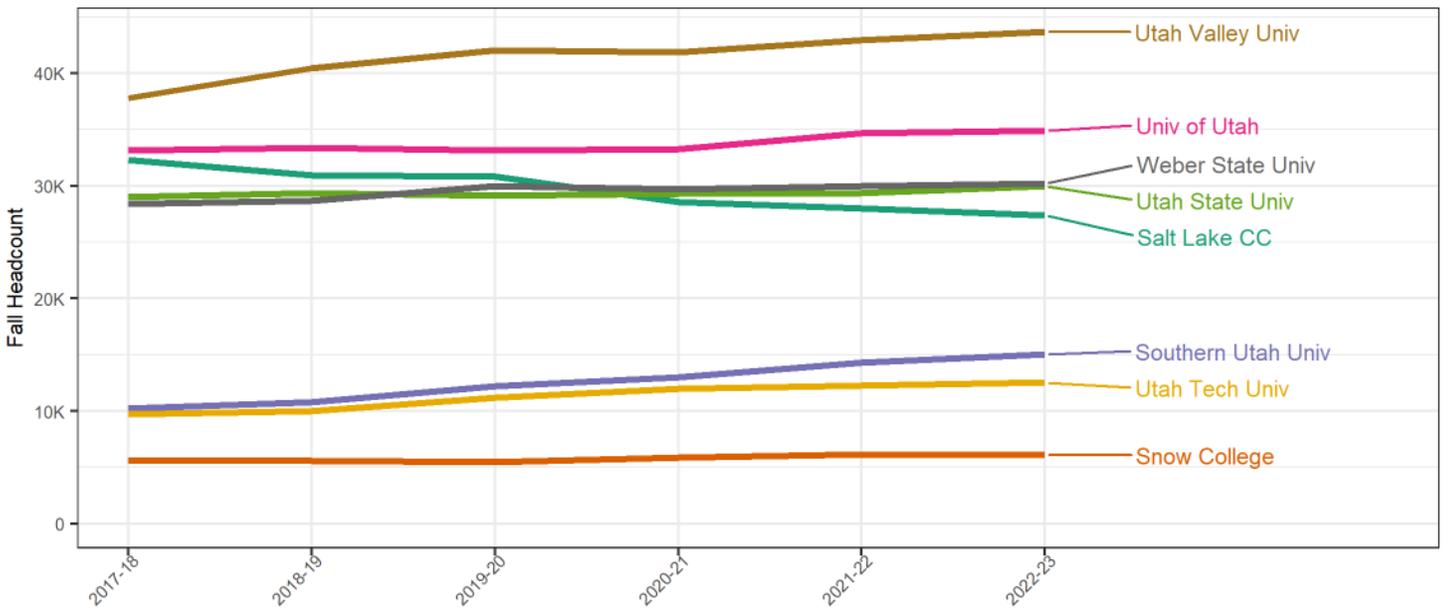


Source: USHE.
Note: Excludes Dixie Tech less-than-half-time occupational advancement students due to data inaccuracies.

At the institutional level, all of Utah's public degree-granting institutions have seen increases in fall enrollment since 2017-18, except for Salt Lake Community College. Southern Utah University, Utah Tech University, and Utah Valley University, which are all located in the fastest-growing Southwest and Mountainland regions, have seen double-digit percentage increases, while the other institutions have grown more modestly. Salt Lake Community

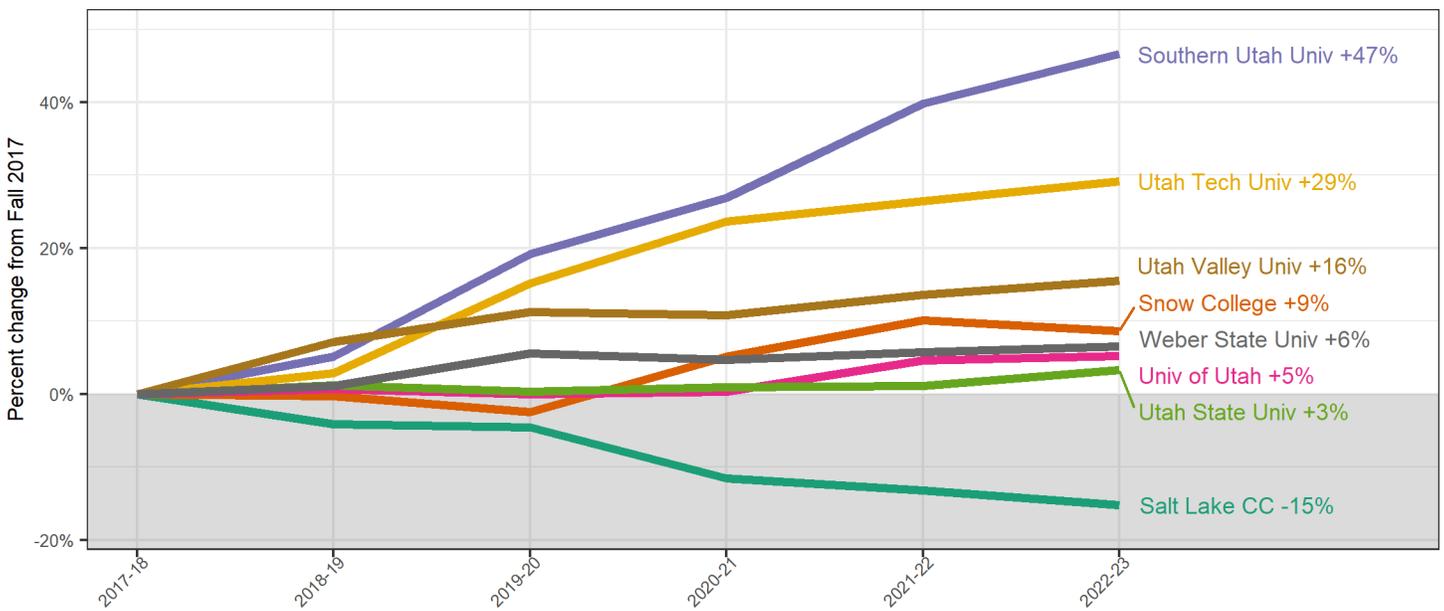
College has experienced a relatively large decline in total fall enrollment, slipping 15% from fall 2017 to fall 2022. Figure 7 provides a total fall enrollment trend line for each of the community colleges, regional universities, and research universities in the state, and Figure 8 illustrates each institution's enrollment percentage change over time. Interestingly, though small fluctuations occurred, none of these institutions saw large enrollment declines during the height of the COVID-19 pandemic.

Figure 7. Total Fall Enrollment by Degree-Granting Institution from 2017-18 to 2022-23



Source: USHE.

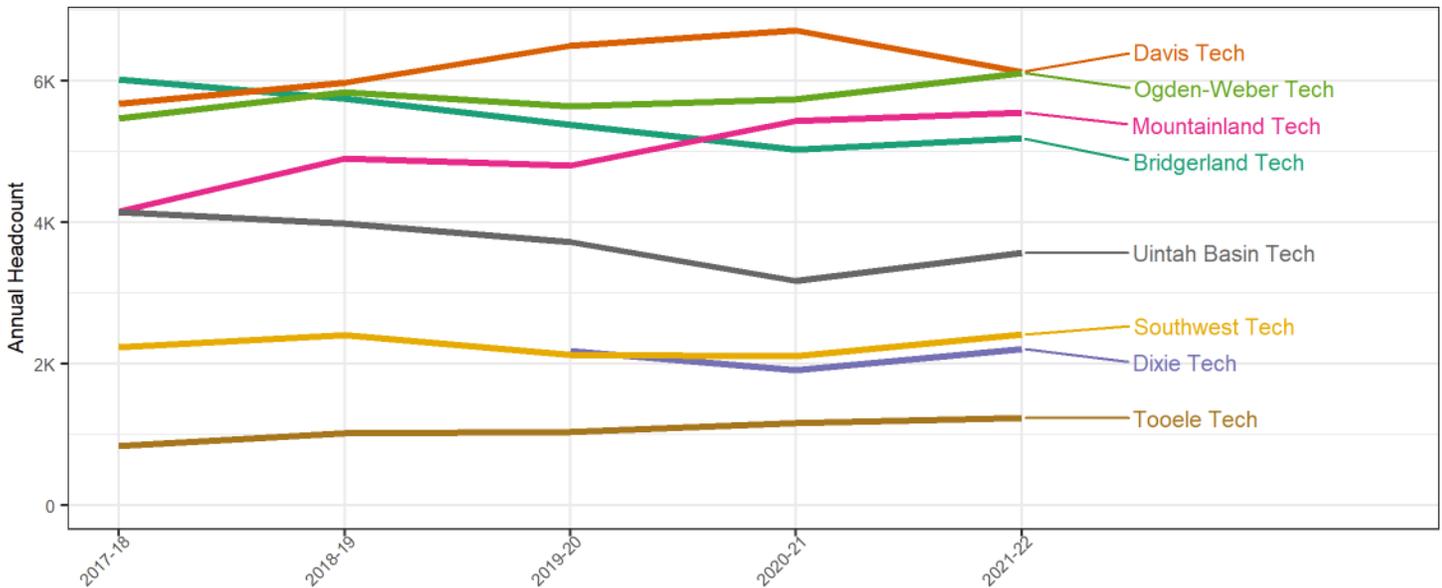
Figure 8. Five-Year Change in Total Fall Enrollment



Source: USHE.

In contrast to the degree-granting institutions, enrollment in the technical colleges has been much more variable. While one institution seems to have maintained relatively consistent enrollment—Tooele Tech—the majority have experienced larger year-to-year fluctuations in the total number of students they serve. Figure 9 illustrates the trendlines of the past five years of total enrollment in the technical college sector.

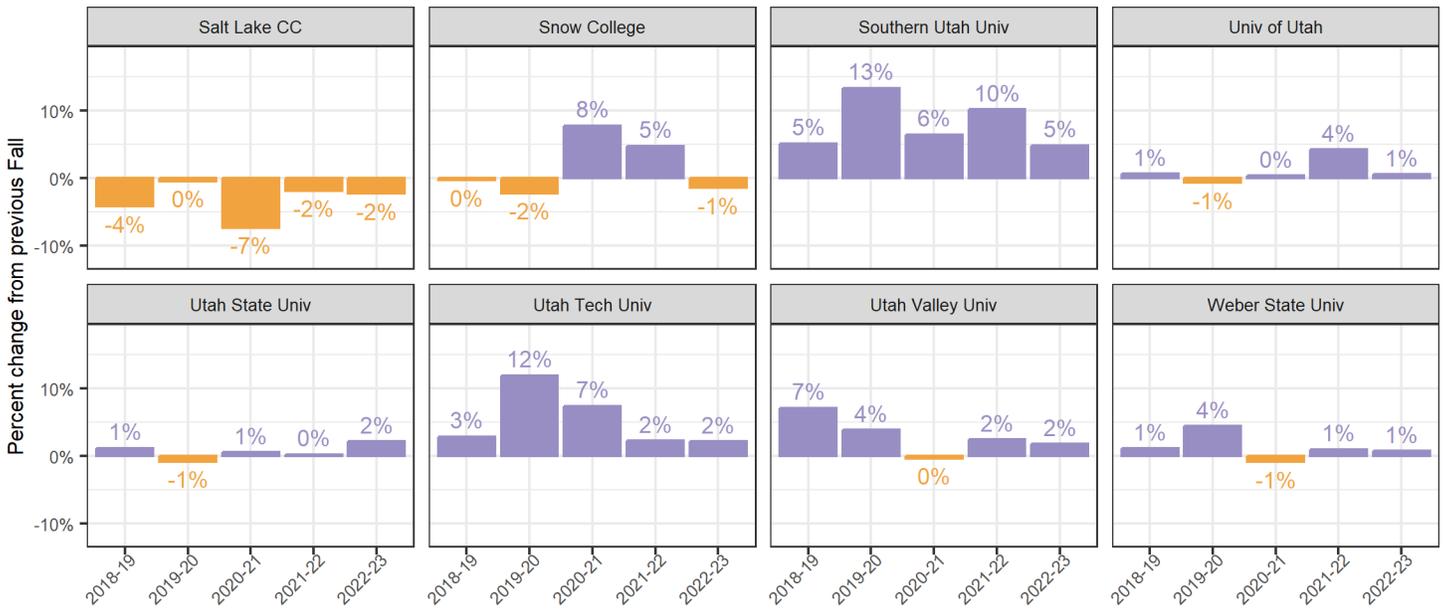
Figure 9. Total Annual Enrollment Over Time by Technical College



Source: USHE.
Excludes Dixie Tech enrollment prior to 2020 due to data inaccuracies.

The enrollment decreases at Salt Lake Community College come into even greater focus when viewed year-over-year. In Figure 10, SLCC is isolated as the only degree-granting institution that has sustained consistent enrollment decline, both preceding and following the COVID-19 pandemic. SLCC's declines mirror national trends in community college enrollment, even as they seem to be out of step with institutions in other parts of Utah.

Figure 10. Year-to-year Changes in Total Fall Enrollment in Degree-Granting Institutions from 2018-19 to 2022-23



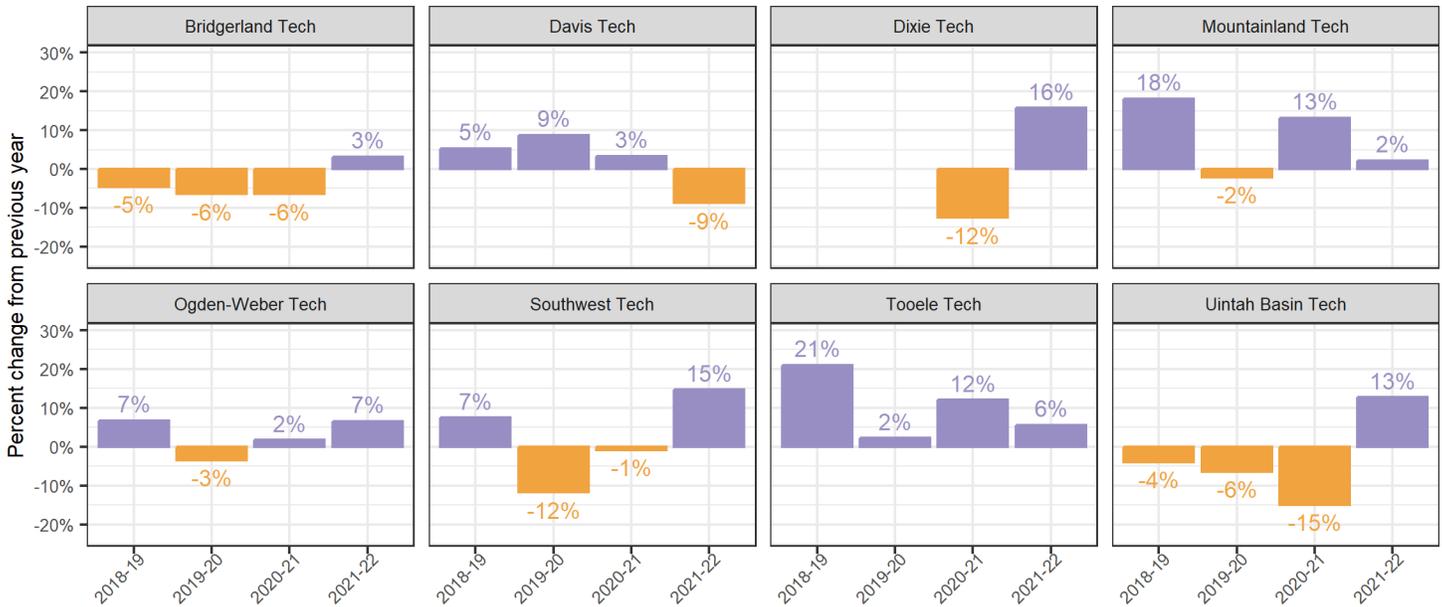
Source: USHE.

The enrollment volatility in the technical college sector also shows up in the year-over-year changes.

Below in Figure 11, we show that most technical colleges experienced enrollment declines in 2019-20, with the exceptions of Davis Tech and Tooele Tech. Again, enrollment decline was common in the spring of 2020 and largely attributable to the COVID-19 pandemic. More recently, most institutions have experienced slight increases in enrollment.

It is important to note that while the percentage changes are large in some cases, the number of students is relatively small. The largest of Utah's technical colleges, Ogden-Weber Tech and Davis Tech, each enroll approximately the same number of students in an entire year as the smallest degree-granting institution, Snow College, does in a fall semester.

Figure 11. Year-to-year Changes in Total Annual Enrollment in Technical Colleges from 2018-19 to 2021-22

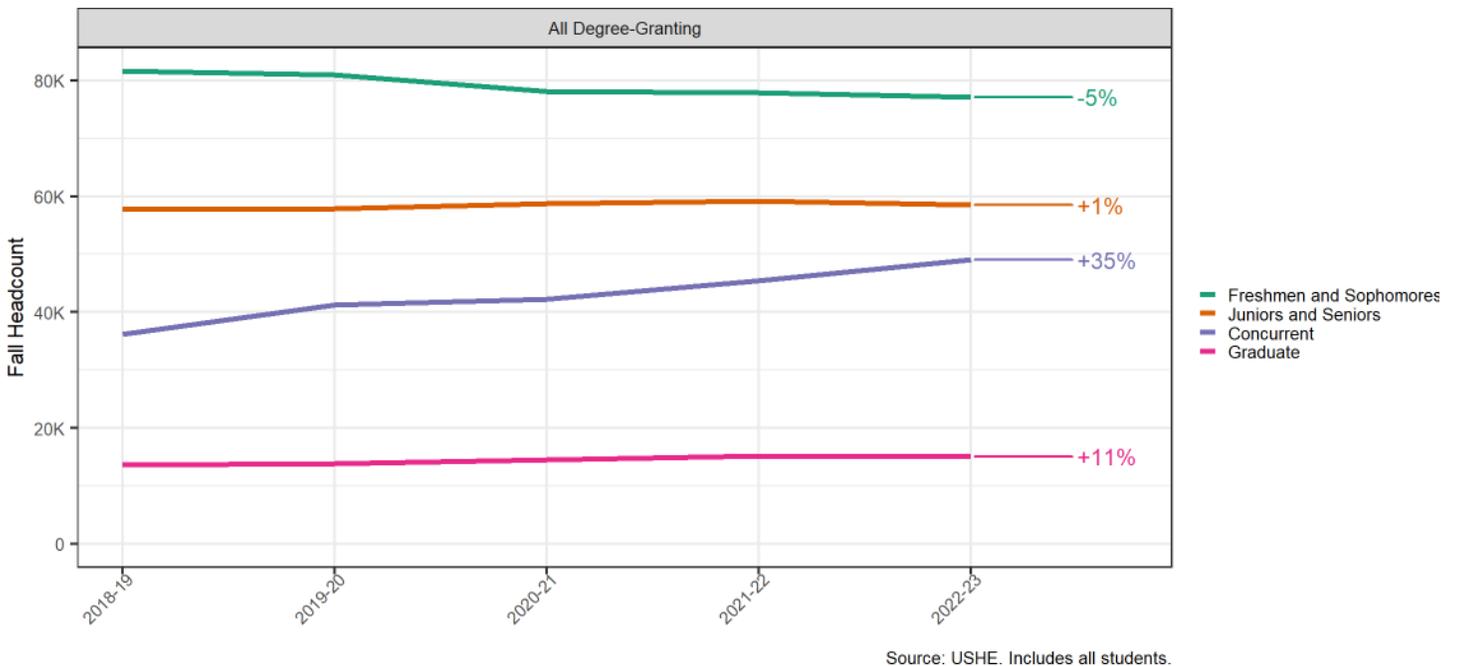


Source: USHE. Note: Excludes Dixie Tech enrollment prior to 2019-20 due to data inaccuracies.

Enrollment by Selected Student Characteristics and Demographics

Sector- and institution-level enrollment trends can obscure important differences among different types of students. Trends are significantly different for concurrent enrollment, non-concurrent undergraduate enrollment, and graduate enrollment (Figure 12). Across Utah's degree-granting institutions, the largest enrollment increase has been among high school students taking advantage of Utah's robust concurrent enrollment program. Meanwhile, enrollment of *non*-concurrently-enrolled freshmen and sophomores has declined by 5% over the past five fall semesters.

Figure 12. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time, by type of student



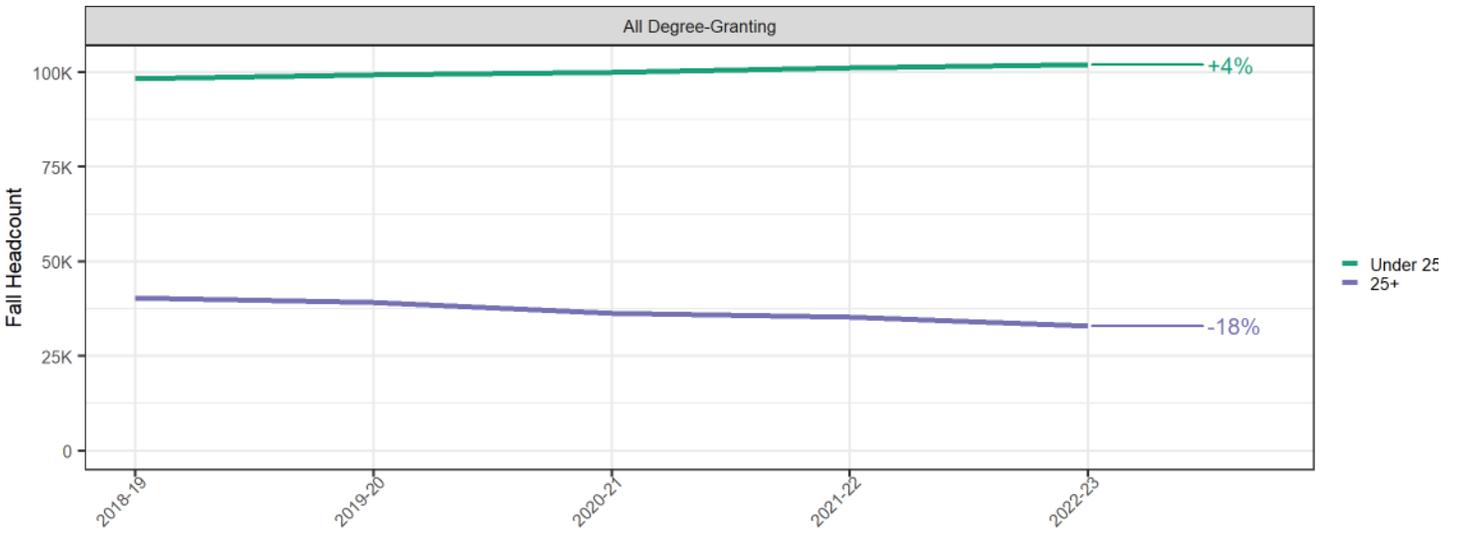
To understand enrollment specifically related to the community college mission, we examined the subset of undergraduate, non-concurrent/high school students by selected demographics: age, eligibility for a federal Pell Grant, and enrollment intensity. Overall, we find increases in enrollment among younger students and those who are not eligible for Pell Grants, and declines in part-time students, students over the age of 25, and Pell-eligible students. Concurrent enrollment is analyzed separately later in this report.

Age

Across Utah's degree-granting institutions, enrollment increased among students under the age of 25. As the state sees increases in the number of high school graduates,⁷ these increases may be expected. Enrollment among students age 25 and older, however, has declined by 18% over the past five years (Figure 13). SUU is the only degree-granting institution that has seen an increase in its enrollment of adults aged 25 and older over the past five years (Figure 14). SUU stakeholders explained that the institution launched some all-online programs aimed at adults during that timeframe; indeed, the number of exclusively online undergraduates at SUU increased by about 3,000 from fall 2018 to fall 2022, while the number of students aged 25+ increased by about 800. Technical college enrollment of adult students has also declined overall, though individual colleges vary.

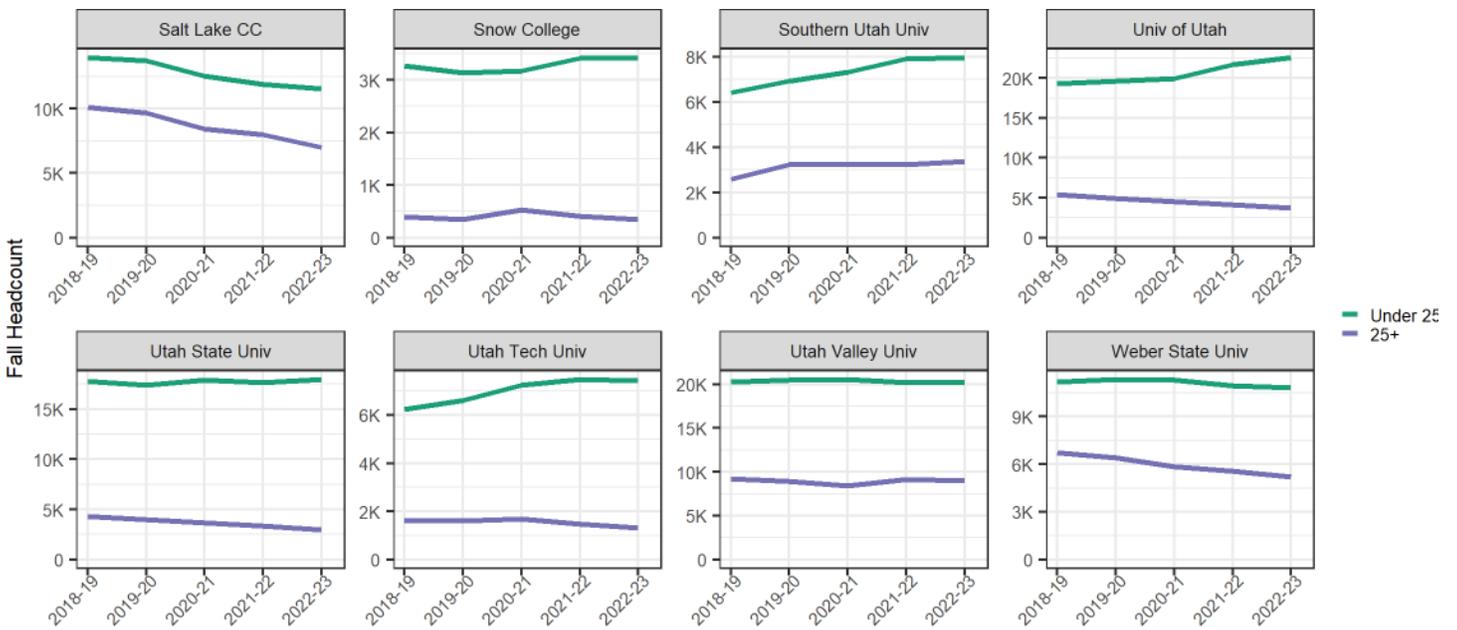
⁷ WICHE (Appendix Table A-3), <https://www.wiche.edu/resources/knocking-at-the-college-door-10th-edition/>

Figure 13. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time by Age



Source: USHE. Excludes High School students.

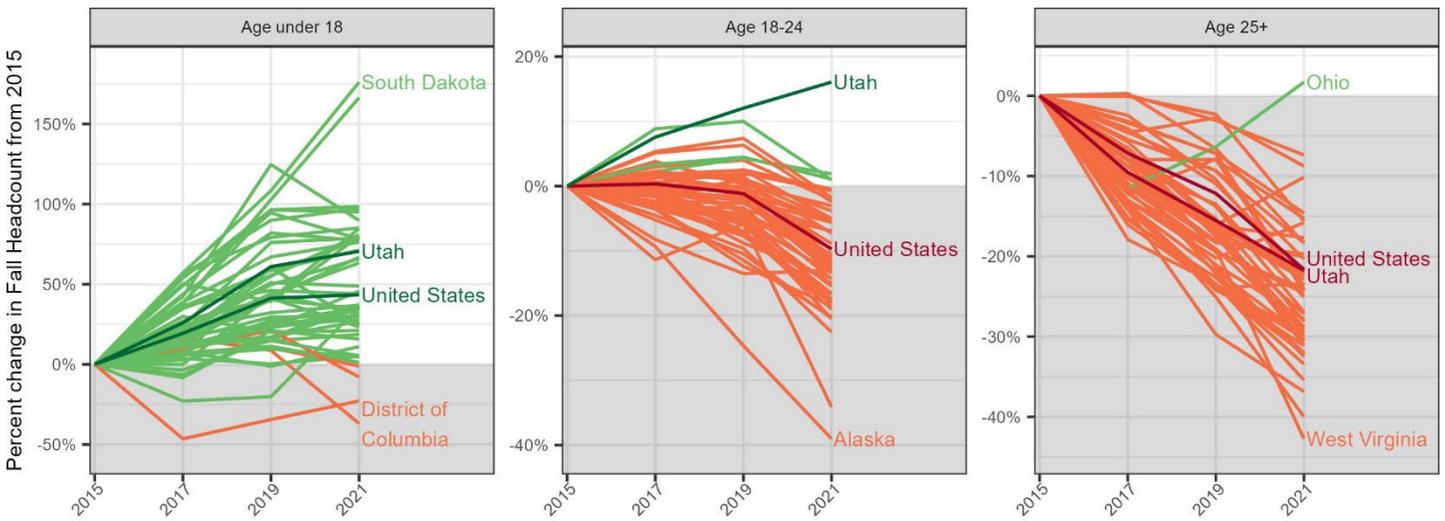
Figure 14. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time by Age



Source: USHE. Excludes High School students.

The decline in students age 25 and older is part of a national trend; all states except Ohio enrolled fewer adult undergraduates at public institutions in Fall 2021 compared to Fall 2015 (Figure 15; increases are in green and decreases in orange). Utah's enrollment of these adults decreased at almost exactly the national rate over that time period. At the same time, Utah's increased enrollment of students aged 18-24 was relatively unique; only a handful of states saw increases in enrollment among that age group, and Utah's percentage increase was the largest. Nearly all states, including Utah, saw increases in students under age 18, a group which primarily includes students earning college credit during high school. We address concurrent enrollment later in this report.

Figure 15. Public Institutions' Undergraduate Headcount, by State and Age Percentage Change from Fall 2015 to Fall 2021

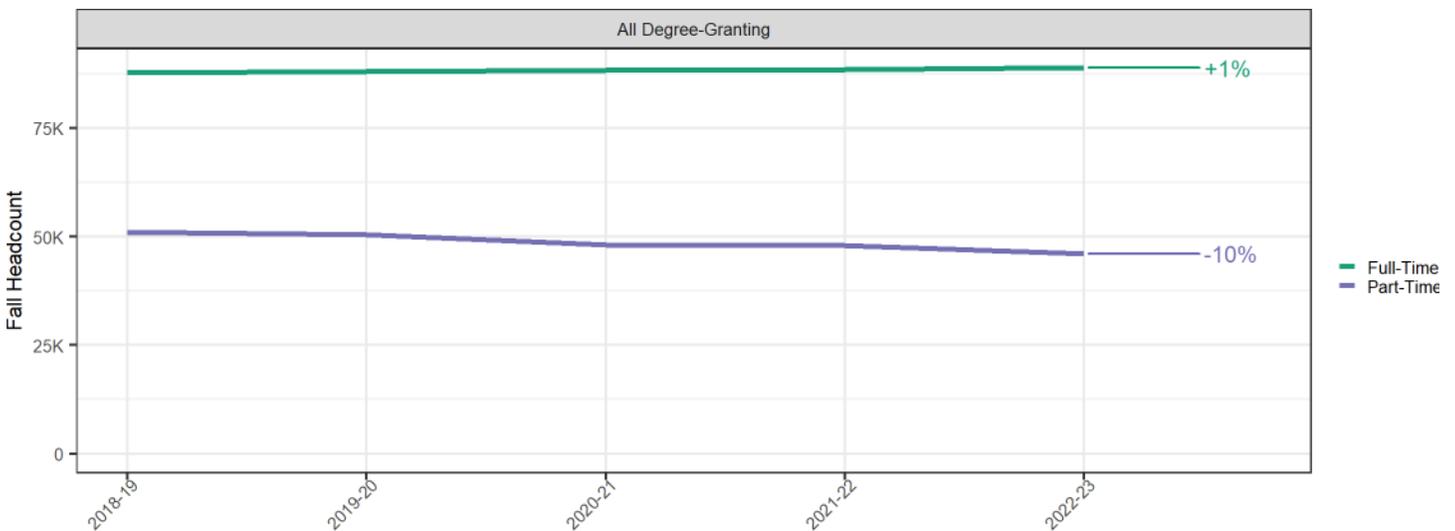


Source: NCES IPEDS Fall Enrollment Survey, files eFYYYb. Notes: Each line represents one state. Only includes undergraduates at public institutions. Data submission is optional in even-numbered years, so only odd-numbered years are included.

Enrollment Intensity

Many Utah students aged 25 or older attend part-time, and most students under the age of 25 attend full-time, so it is not surprising that part-time enrollment has declined along with the decline in older students. Figure 16 shows that statewide at the degree-granting institutions, full-time undergraduate enrollment increased by 1% over the most recent five fall semesters, while part-time undergraduate enrollment (exclusive of concurrent enrollment) declined by 10% over the same time period. This overall trend holds at all of the degree-granting institutions except Utah Valley University, where there were increases in part-time enrollment and decreases in full-time enrollment.

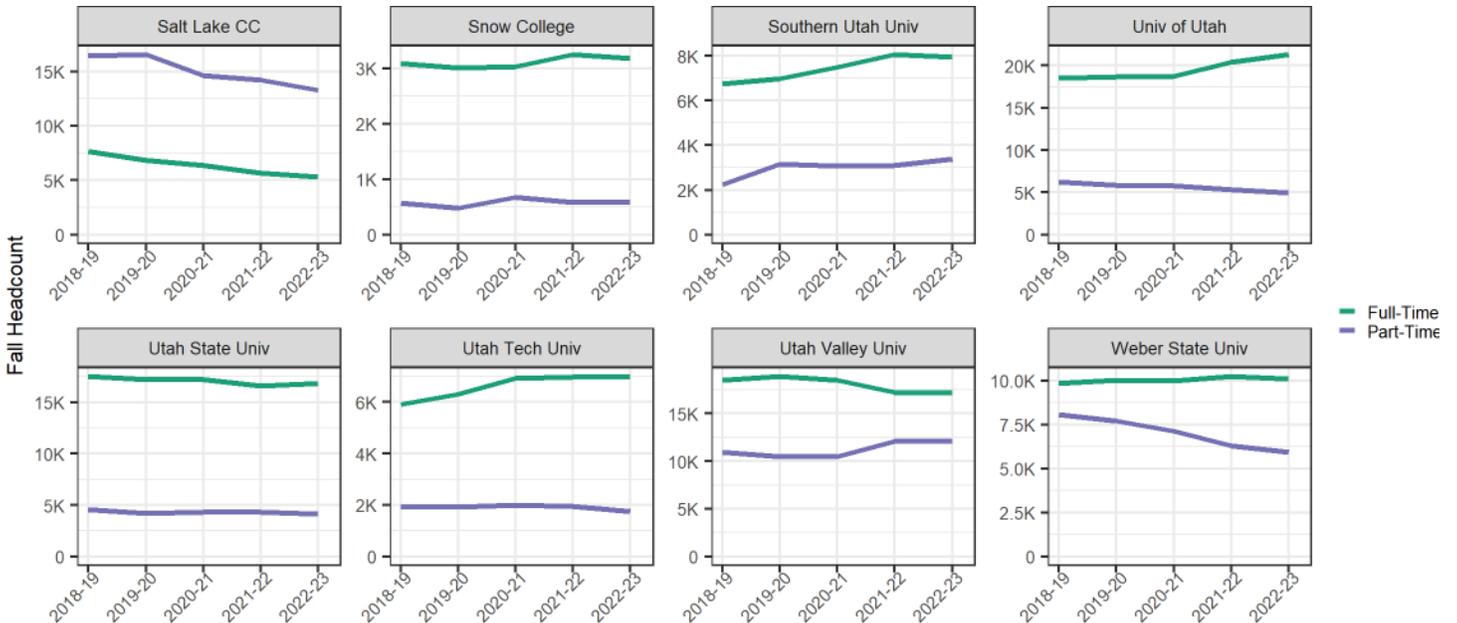
Figure 16. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time by Full-Time / Part-Time



Source: USHE. Excludes High School students.

This statewide decline in part-time students is primarily driven by a decline in part-time students at Salt Lake Community College and Weber State University (Figure 17). Utah's technical colleges also serve majority part-time students, but they have not seen the same declines in part-time students.

Figure 17. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time by Full-Time / Part-Time



Source: USHE. Excludes High School students.

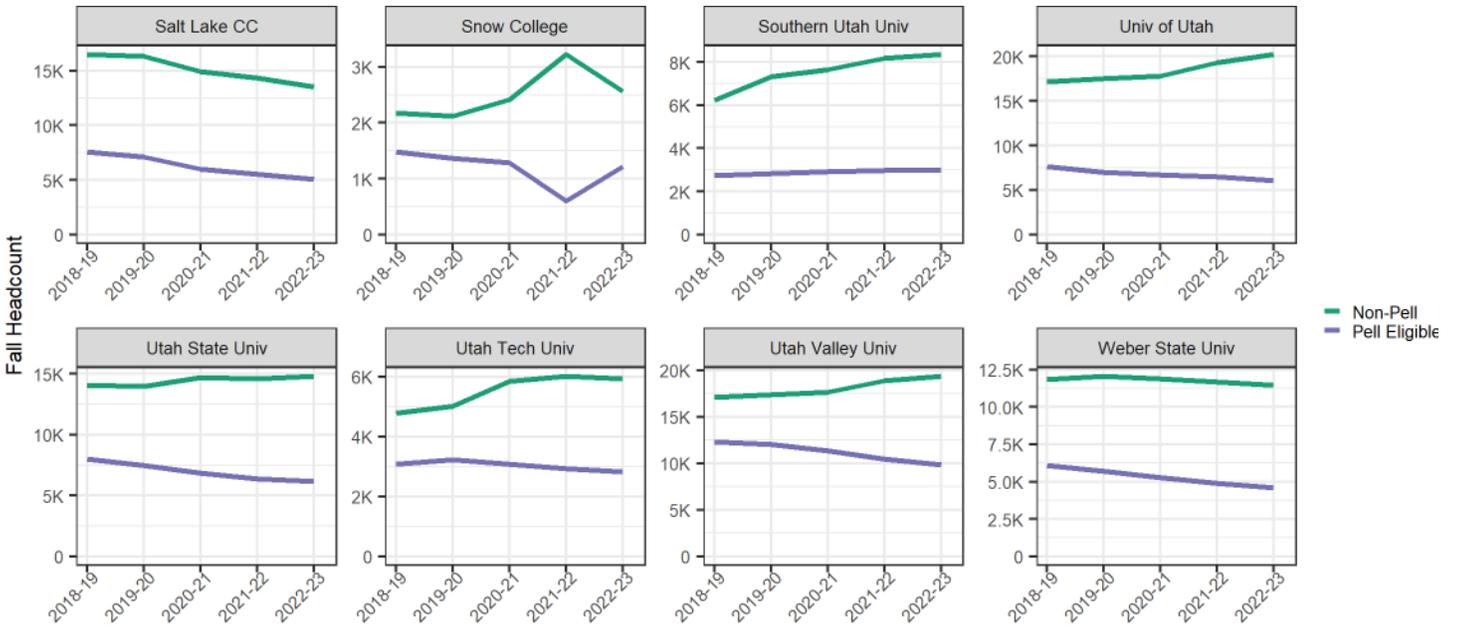
Pell Eligibility

To be eligible for a federal Pell Grant, students must have completed high school and meet income and asset requirements through the Free Application for Federal Student Aid (FAFSA). They must also be admitted to and enroll in a degree-or-certificate-seeking academic program. Receipt of a federal Pell Grant is a general indicator that the student comes from a low-income background and would not be able to afford postsecondary education without federal and/or state assistance. Utah has a relatively low FAFSA completion rate compared to other states, so counts of Pell-eligible students almost certainly undercount low-income students. Additionally, the quality of USHE's data on Pell receipt and Pell eligibility has improved over time, meaning that older data may be less reliable. However, we can still use Pell eligibility data to understand general enrollment trends among low-income students.

As an indicator of a family's ability to pay for education, these trendlines are also subject to the health of the overall economy; where more students may qualify for Pell during economic downturns, fewer may qualify during periods where employment rates and wages are higher. It is important to keep the economic downturn catalyzed by the COVID-19 pandemic in mind when interpreting these data.

At Utah's public degree-granting institutions, all institutions except SLCC have experienced increases in non-Pell eligible students, and all institutions except SUU have experienced decreases in Pell eligible students. Figure 18 provides trend lines for the degree-granting institutions. (Data for Technical College students is not available by Pell status.)

Figure 18. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time, by Pell Status



Source: USHE. Excludes High School students.

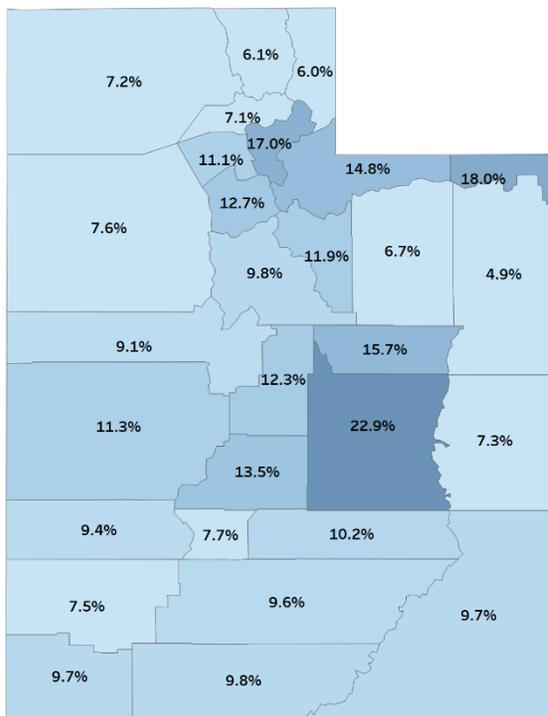
Participation Rates by Region

To understand regional enrollment trends, we calculated the percentage of different subgroups of the population enrolled in higher education in different areas of the state. As this study is specifically concerned with community college services and audiences, we focus on freshman- and sophomore-level participation rates, excluding concurrent enrollment. Freshman and sophomore enrollment at all USHE institutions, as a percentage of the population age 18-44 without at least an Associate's degree,⁸ varies from 8.8% to 36.1% across Utah counties (Figure 19).⁹ Of particular note, the counties with the highest participation rates are not universally urban or universally rural; these maps do not show obvious evidence that there is a rural-urban divide in postsecondary access.

⁸ Note that the less than Associate's degree denominator excludes certificates. Excluding certificates leaves out a key function of community colleges, but U.S. Census data on educational attainment do not have a separate category for those with postsecondary certificates.

⁹ Participation rates are calculated by taking student headcounts from USHE and dividing them by the total population aged 18-44 without at least an Associate's degree. In counties with high populations, a greater number of students need to enroll in higher education to increase the participation rate compared to less populous counties.

Figure 20. Freshman and Sophomore Degree-Granting Participation Rates by County Annual Freshman and Sophomore Headcount (Degree-granting institutions only) as a percentage of the population aged 18-44 with less than an Associate’s Degree



Enrollment at most Utah institutions is highly local; that is, most institutions draw the vast majority of their in-state students from a relatively small area near their campus(es). In 2019, NCHEMS found that the largest share of undergraduates enrolled at each of the eight USHE colleges and universities are from the county where the institution is located.¹⁰ This trend still holds in this more recent analysis. On the one hand, this indicates that institutions appear to be focusing on reaching people in their home communities. At the same time, areas of the state not near the campuses of any institutions tend to have lower participation rates, and participation rates in each county tend to favor the types of institutions (i.e. technical college vs. degree-granting institution) that are nearby.

Main Drivers of Enrollment Trends

In addition to analyzing the enrollment trends, the NCHEMS team has identified several drivers that may be impacting where, when, and how Utah students enroll in postsecondary education. They include:

- Concurrently enrolled high school students have been a primary driver of enrollment increases across the state.

¹⁰ NCHEMS, <https://nchems.org/wp-content/uploads/191126-Utah-Strategic-Plan-Report-FINAL.pdf>

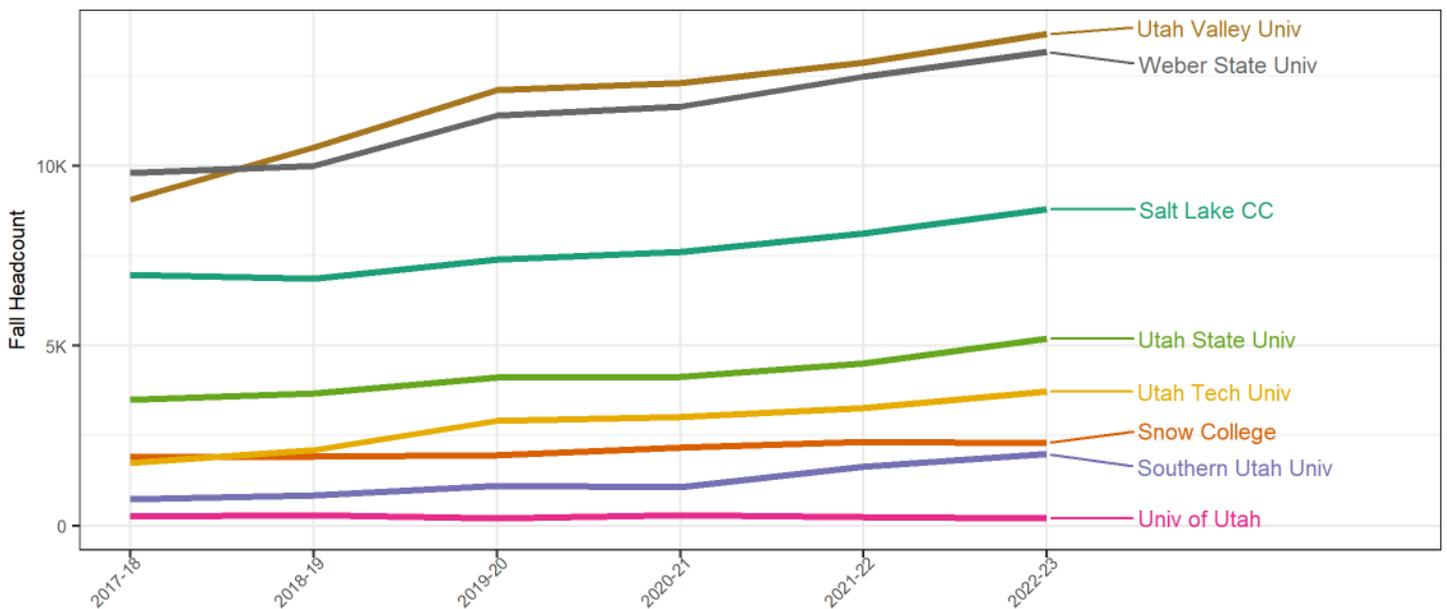
- Though enrollment is increasing statewide, the share of residents enrolled in school or college is not generally increasing, and is decreasing in some regions.
- Hispanic/Latinx people are growing as a share of the overall state population, but postsecondary institutions have not grown their enrollment of Hispanic/Latinx students at the same rate.
- Overall statewide enrollment increases have been almost entirely reliant on young students, either concurrently enrolled while in high school, or enrolling directly after graduating from high school. Losses have taken place primarily among continuing students, which points to possible challenges with student retention.
- SLCC and Snow College have seen large declines in their number of academic/transfer-oriented Associate's degrees awarded and simultaneous large increases their number of applied/professional Associate's degrees awarded.

Further details about each of these potential enrollment drivers are included in the sections below.

Impact of High School Students and Concurrent Enrollment

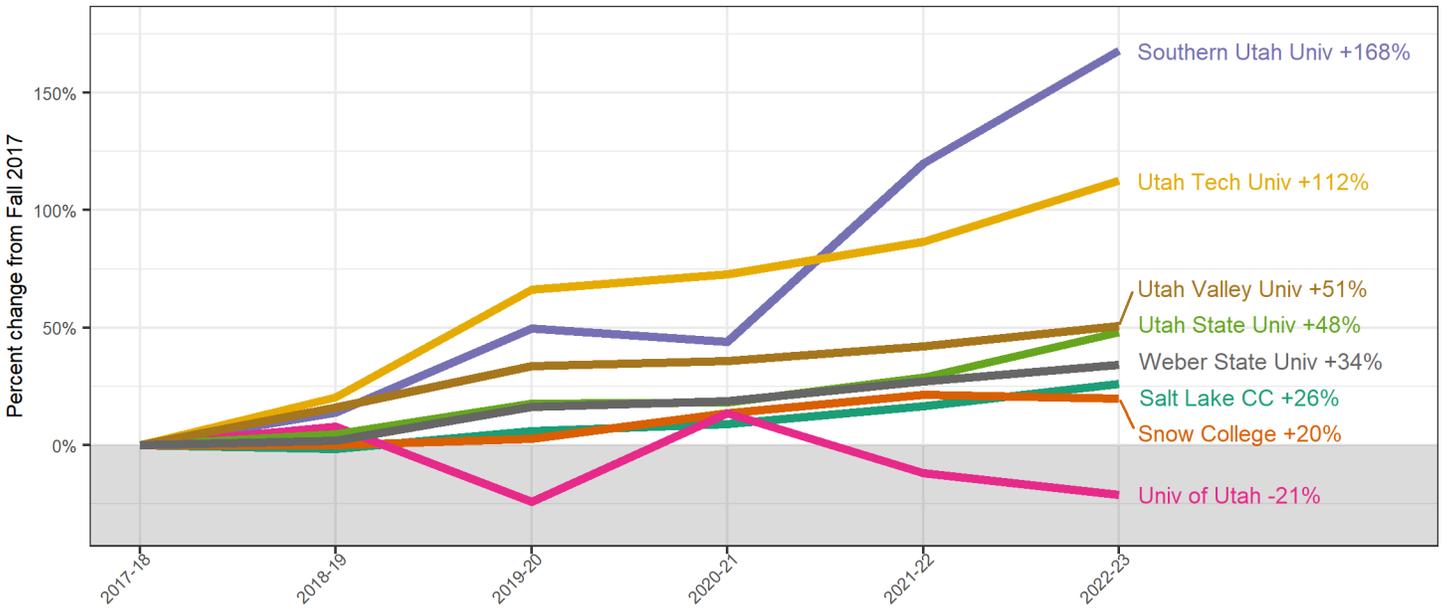
Enrollment of high school students has been a primary driver of enrollment increases across the state. Apart from the University of Utah, which offers very little concurrent enrollment, every institution's number of concurrent enrollment students has increased by at least 20% in the past six years. This is even true of SLCC, which has seen declines in nearly every other area of enrollment. We show concurrent enrollment trends in Figure 21 and percent change over time in Figure 22.

Figure 21. Concurrent Fall Enrollment Over Time by Degree-Granting Institution



Source: USHE.

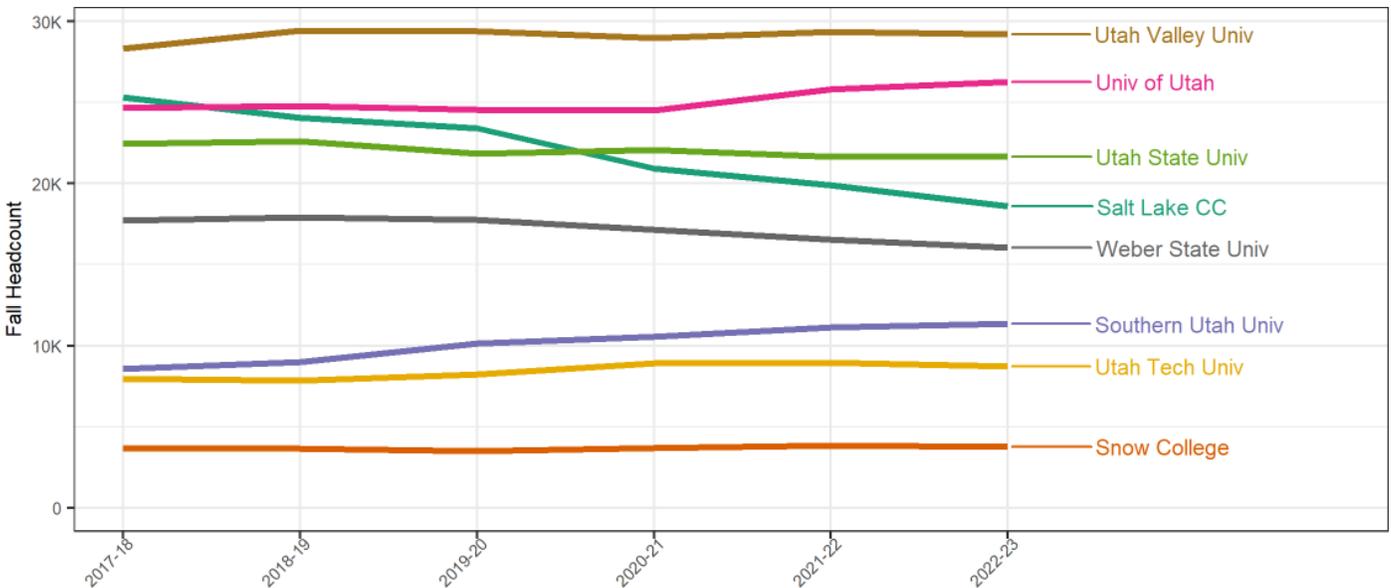
Figure 22. Five-Year Change in Concurrent Fall Enrollment



Source: USHE.

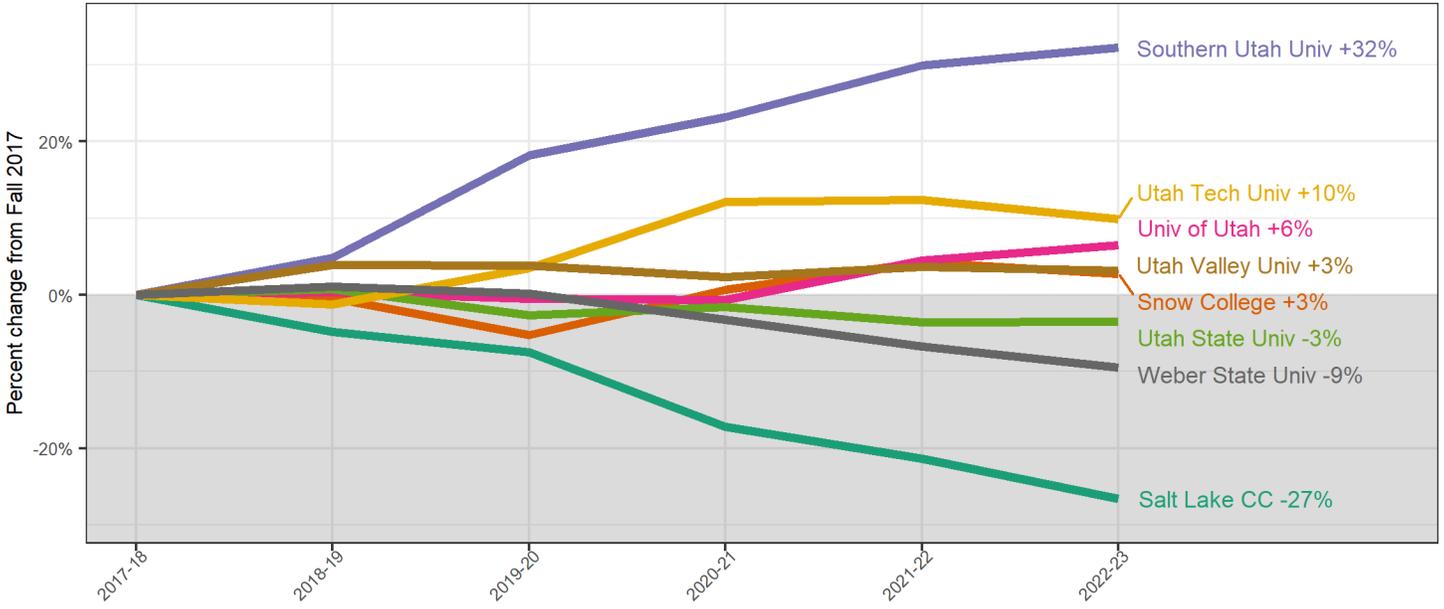
If we exclude concurrent enrollment from undergraduate totals, patterns over time look quite different (Figure 23). Three degree-granting institutions—Weber State, Utah State, and Salt Lake Community College—lost non-concurrent undergraduate enrollment from Fall 2017 to Fall 2022, though SLCC's decline was the largest (Figure 24). Southern Utah University and Utah Tech University have experienced double-digit increases in non-concurrent enrollment that mirror their overall enrollment increases. Other institutions show much more modest increases in this portion of enrollment compared to overall institutional totals.

Figure 23. Non-Concurrent Undergraduate Fall Enrollment Over Time by Degree-Granting Institution



Source: USHE. Note: Excludes graduate students.

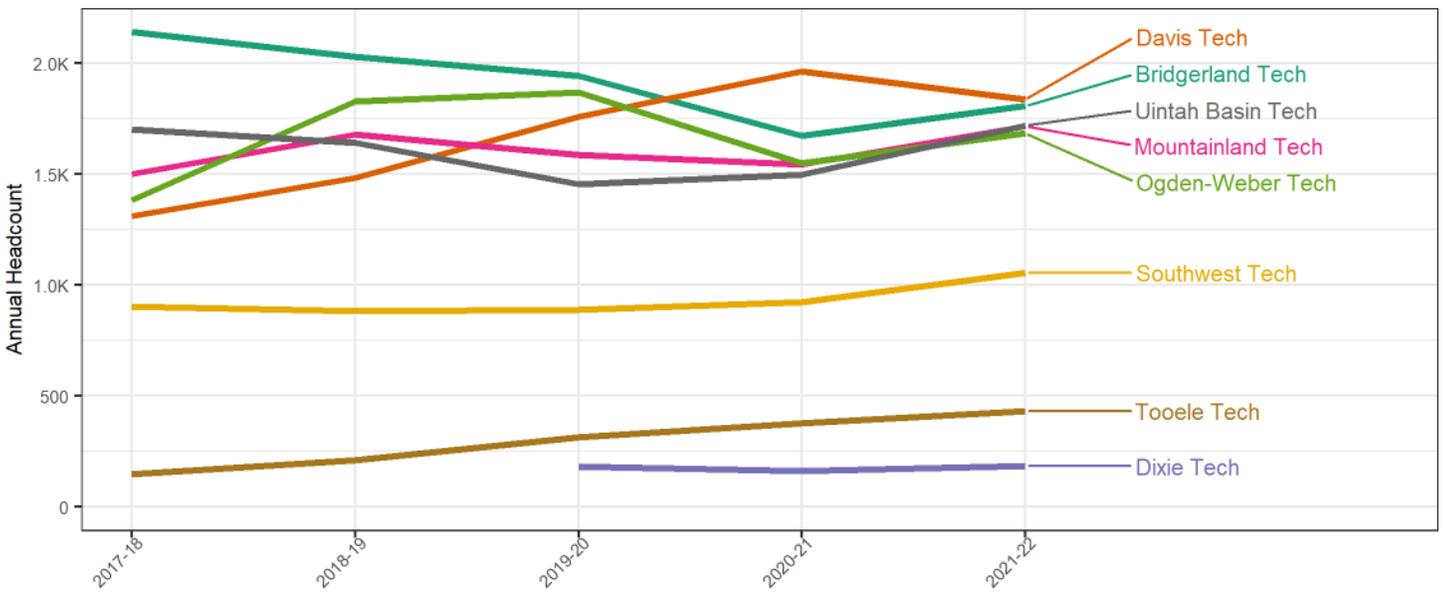
Figure 24. Five-Year Change in Non-Concurrent Fall Enrollment



Source: USHE.

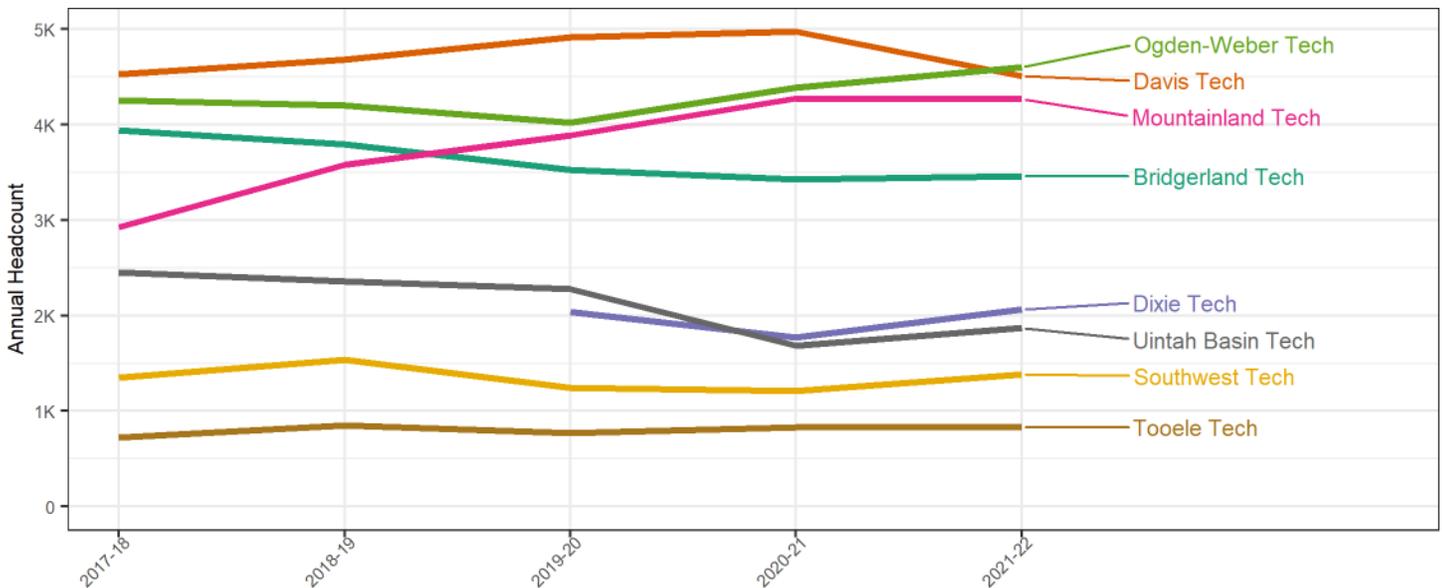
Among the technical colleges, the impact of high school enrollment has been less consistent. With some ups and downs, all of the technical colleges except Bridgerland Tech have increased the number of high school students they serve over the past five years (Figure 25), but overall enrollment increases, where they exist, have not been as heavily reliant on high school students as has been the case among the degree-granting institutions (Figure 26).

Figure 25. High School Fall Enrollment Over Time by Technical College



Source: USHE.
Note: Excludes Dixie Tech enrollment prior to 2019-20 due to data inaccuracies.

Figure 26. Non-High School Annual Enrollment Over Time by Technical College



Source: USHE.
 Note: Excludes Dixie Tech enrollment prior to 2019-20 due to data inaccuracies.

Participation Rates and Population Trends

Despite statewide enrollment increases, stakeholders who met with NCHEMS across Utah described challenges in recruiting students within the context of a hot job market with low unemployment as well as a declining appreciation for the value of a college degree statewide. We analyzed data from the American Community Survey to see whether, over time, people in different parts of Utah report working more and attending postsecondary education less. Figure 27 shows that, among those age 18-24, this appears to be happening in some parts of the state but not others. (Among those age 25-44, college enrollment rates are so consistently low that trends over time are hard to discern.) The trend is particularly striking in Washington County, an area experiencing rapid population growth, where the percentage of young people attending school or college has shrunk significantly, and the percentages of both those who are working more than 30 hours per week and those who are not working at all have grown. There are no regions in the state in which the percentage of young people who report attending college has consistently increased over time.

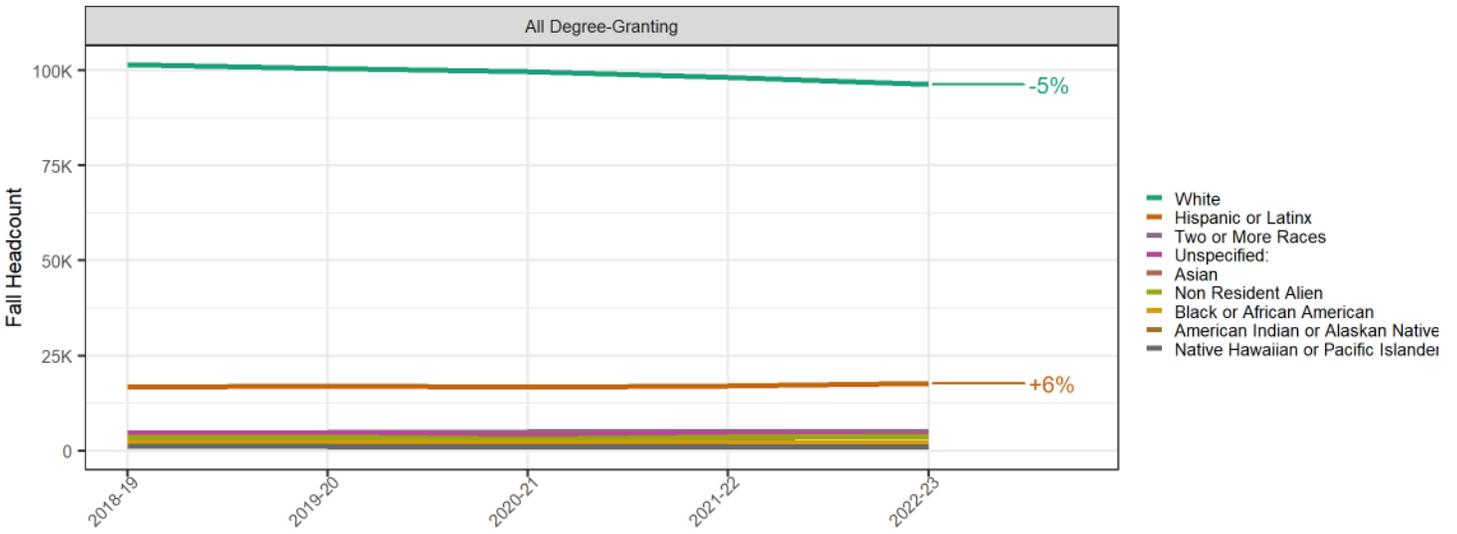
Figure 27. Percent of population age 18-24 with less than an Associate's degree Enrolled in education vs. working, by year



Source: US Census Bureau ACS PUMS. Note: 2020 data is not included due to pandemic-related inaccuracies. Hours worked are shown only for those who have not attended college/school in the previous three months.

As noted earlier, the Hispanic/Latinx population is growing and is expected to be an increasingly large share of Utah's population in years to come. This change shows up in the statewide enrollment figures; while enrollment among White, non-concurrent undergraduates has decreased statewide by five percent since 2018, enrollment among Hispanic/Latinx students has increased by six percent (Figure 28). At the same time, across most regions in Utah, Hispanic/Latinx populations have lower participation rates in higher education compared to other racial/ethnic groups (Figure 29).

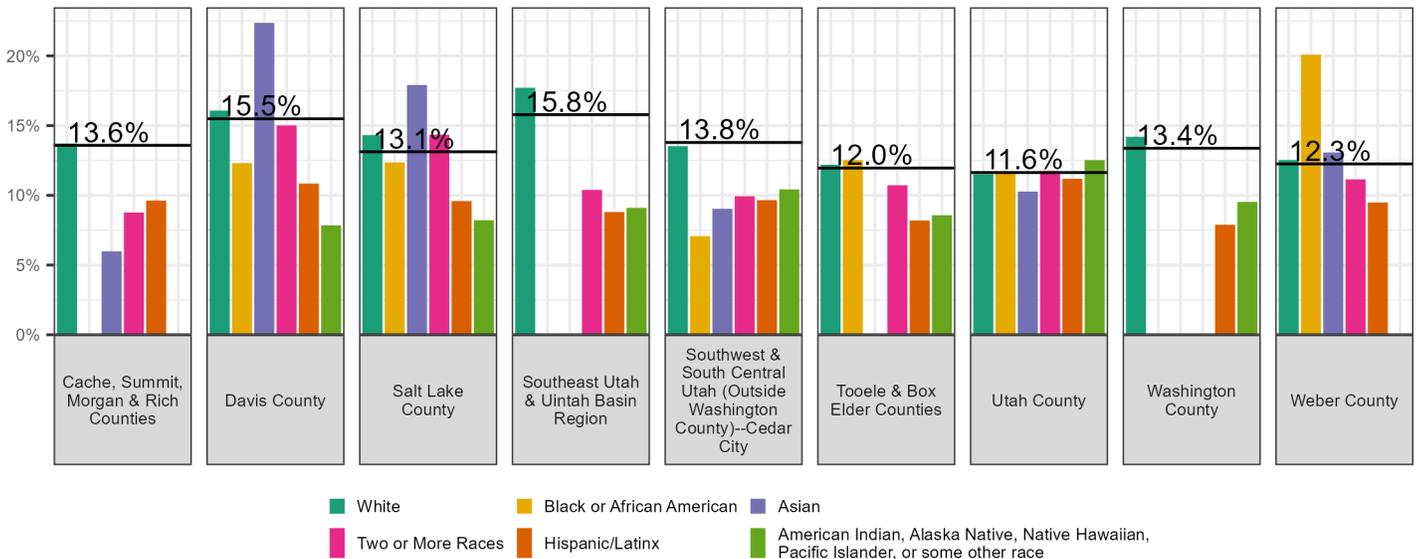
Figure 28. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time by Race/Ethnicity



Source: USHE. Excludes High School students.

Figure 29. Participation Rates by Race/Ethnicity and County - All USHE Institutions

Freshman & Sophomore Enrollment per Population age 18-44 with less than an Associate's degree, by race/ethnicity



Sources: USHE; U.S. Census Bureau; American Community Survey (ACS), 2017-2021 5-year ACS Public Use Microdata Sample (PUMS)
 Notes: Groups with margins of error larger than 30% of their population estimates have been removed. Students of unspecified race are included in the overall rates (black lines), but excluded from the individual race/ethnicity columns. In some cases, this means total participation is higher than that of each of the races/ethnicities.

Salt Lake County has the largest potential college-going population that is Hispanic/Latinx, both in terms of numbers and percentage (Figure 30). This is the area primarily served by Salt Lake Community College (the University of Utah also serves the county, but not in terms of community college services and audiences). SLCC serves the highest number of Hispanic/Latinx students of any institution in the state (Figure 31). This number has decreased only slightly in recent years, which is notable within the context of SLCC's much larger decline in overall enrollment. However, given population trends, SLCC would likely have needed to see a sizeable *increase* in Hispanic/Latinx enrollment to maintain overall enrollment levels over time.

Figure 30. Race/Ethnicity of Population Aged 18-44 with less than an Associate's Degree

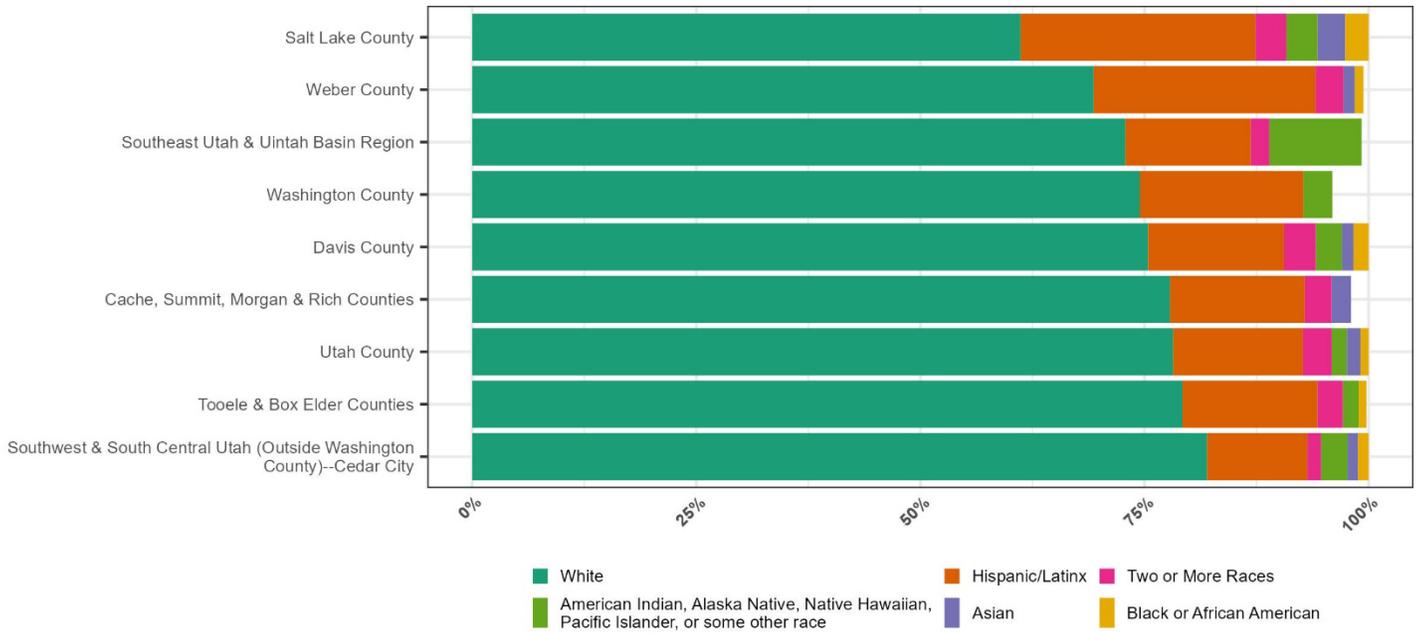
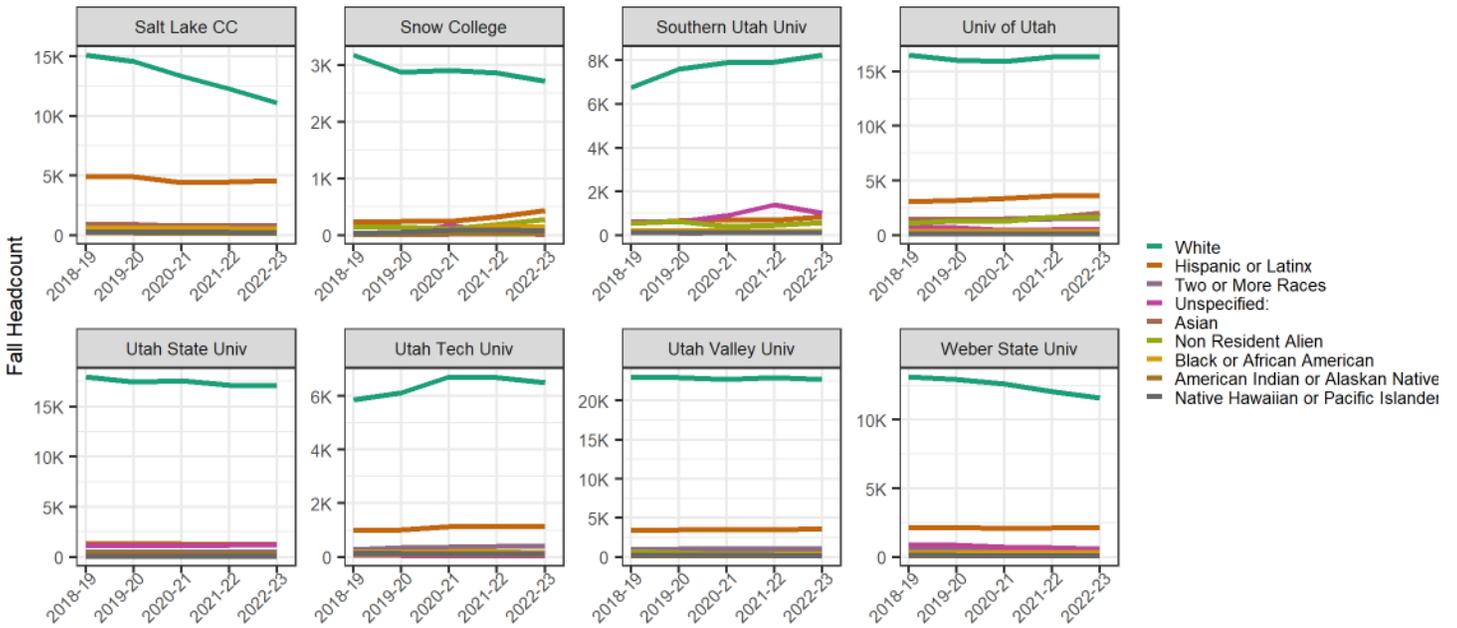


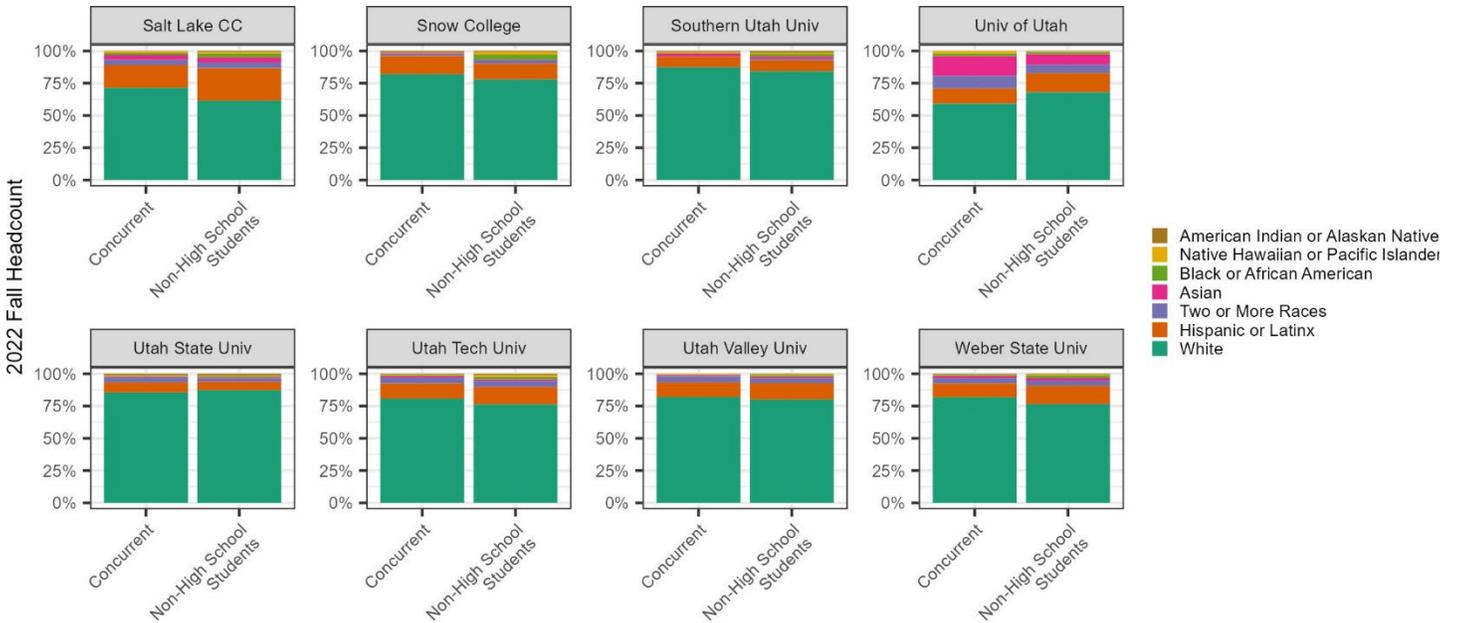
Figure 31. Undergraduate Fall Enrollment Over Time by Race/Ethnicity



Utah envisions concurrent enrollment as a pipeline to postsecondary enrollment after high school. It is therefore worth comparing the race/ethnicity of concurrent enrollment students to those of non-high school students as a window into the possible future. In Fall 2022, concurrent enrollment students were more likely to be White compared to other undergraduate students at most of the degree-granting institutions. (The only exception was the University of Utah, which serves very few concurrent enrollment students.) This is similar to other recent fall

semesters, and means that—unless patterns change—if concurrent enrollment students are the primary pool from which USHE institutions recruit future students, Utah's public institutions are not likely to increase their enrollment of Hispanic/Latinx students.

Figure 32. Fall 2022 Undergraduate Enrollment by Concurrent Status and Race/Ethnicity



Source: USHE. Note: Excludes Nonresident (international) students and students whose race is unspecified.

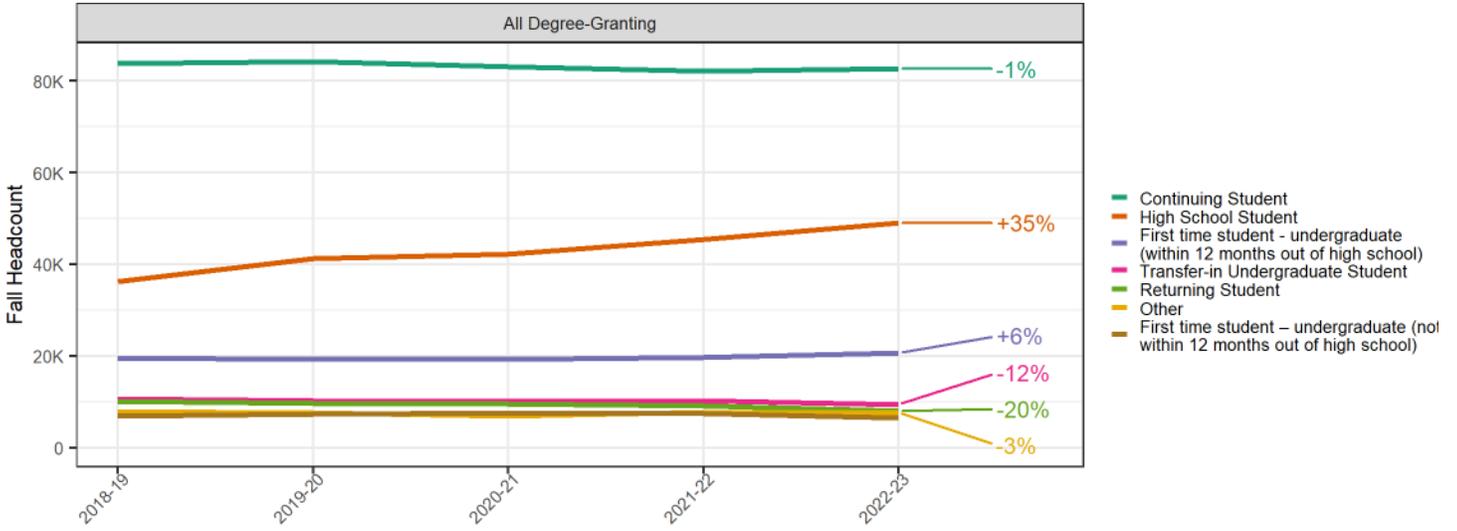
Recruitment and Retention

Across Utah's degree-granting institutions, the number of first-time college students enrolling within 12 months of high school has increased since 2018-19. At the same time, the number of continuing students (those who are re-enrolling at the institution after having attended the previous fall or spring term), returning students (those re-enrolling after a gap), incoming transfer students, and first-time students who are enrolling more than a year after high school have all declined (Figure 33). This means that the overall statewide increases have been entirely reliant on young students, either concurrently enrolled while in high school, or enrolling directly after graduating from high school. Losses have taken place primarily among continuing students, which points to possible challenges with student retention.

Overall, the population of high school graduates in Utah has been increasing; however, over the medium-term, Utah should expect to see declines in the number of students graduating from high school.¹¹ From 2013-2018, Utah enjoyed the second highest percent increase in the number of high school graduates in the country, behind only Nevada. However, from 2019-2037, the number of high school graduates in Utah is expected to decrease by 2%. While the state has been able to rely on high school students and recent graduates to fuel postsecondary enrollment increases now, this may not always be the case moving forward. Additionally, as institutions in other states face a declining population of high school graduates, Utah's students will presumably be more heavily recruited by out-of-state institutions.

¹¹ WICHE, <https://www.wiche.edu/resources/knocking-at-the-college-door-10th-edition/>

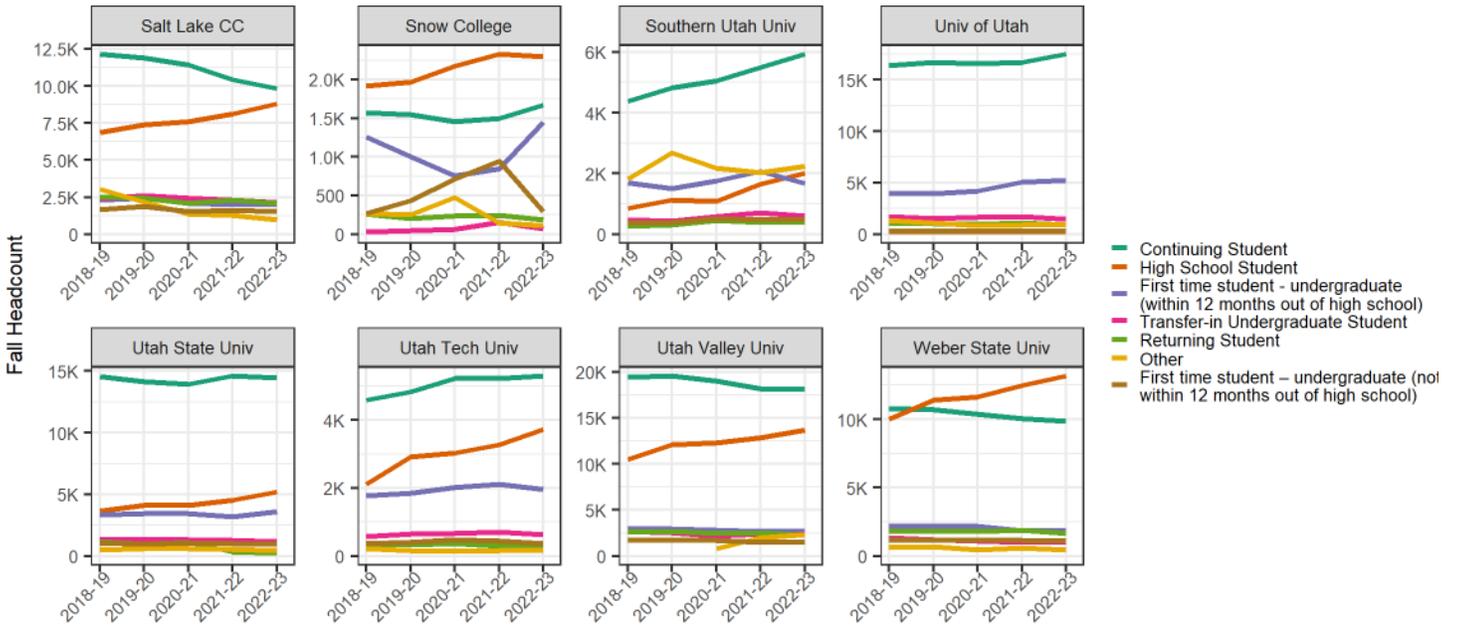
Figure 33. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time by Registration Status



Source: USHE. Includes all undergraduate students.

These patterns do vary by institution, however (Figure 34). Salt Lake Community College, Utah State University, Utah Valley University, and Weber State University have all lost continuing student enrollment in recent years. The University of Utah and Utah Tech have seen small increases; only Southern Utah University has significantly grown its number of continuing students. No Utah institutions have seen meaningful increases in their recruitment of students enrolling more than one year after high school, returning students coming back after a gap, or transfer students.

Figure 34. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time by Registration Status



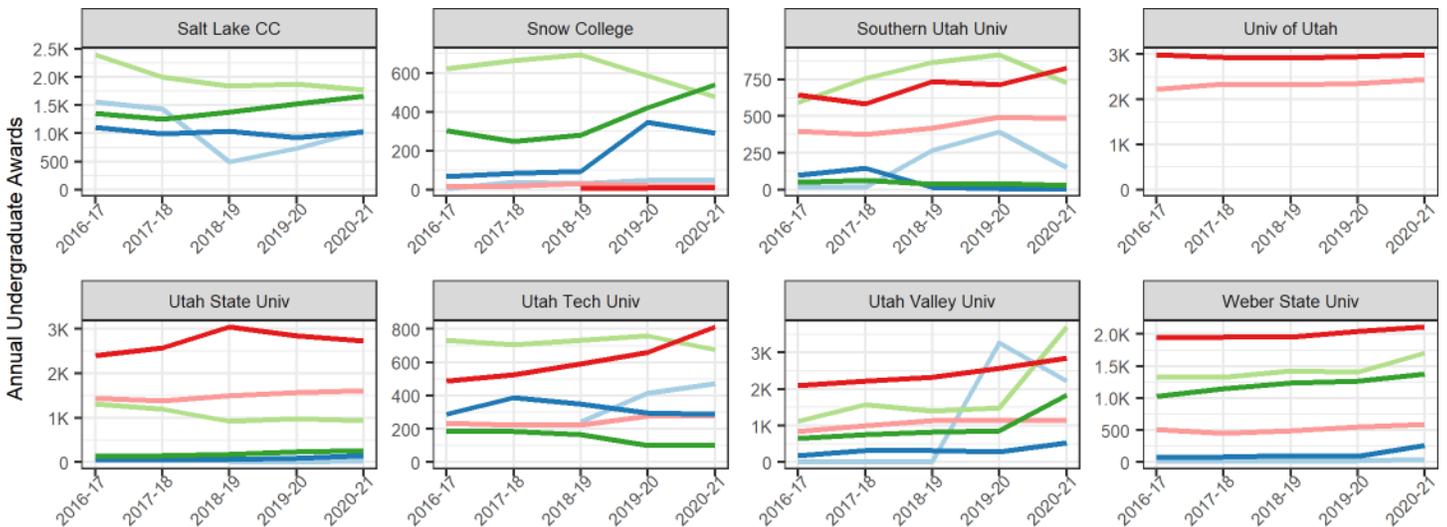
Source: USHE. Includes all undergraduate students.

Degree and Certificate Programs

Utah's two community colleges, Salt Lake Community College and Snow College, are the only two institutions in the state that award Associate's degrees intended primarily for transfer to another institution. While the four-year institutions offer similar degrees, they generally intend for their students to stay to pursue Bachelor's degrees rather than transferring. Both community colleges have seen large declines in their number of academic/transfer-oriented Associate's degrees awarded and simultaneous large increases their number of applied/professional Associate's degrees awarded (Figure 35). Stakeholders at SLCC told NCHEMS that the institution is intentionally working to pivot towards more workforce-oriented, as opposed to transfer-oriented, programming, which is where they have observed increased demand. It is therefore somewhat surprising that workforce-oriented certificates have also decreased at SLCC by 7% since 2016-2017. During the same timeframe, Snow College, as well as five of the eight technical colleges (Figure 36), increased the number of workforce-oriented certificates they awarded. It is also worth noting that SLCC's overall awards have not decreased by nearly the same level as its enrollment. It is likely that this is a lag effect, and that SLCC may expect to see future decreases in its number of awards based on current decreases in enrollment.

Associate's degree and certificate trends are less consistent at Utah's 4-year institutions, where those awards may reflect institutional policy decisions, such as the decision to award students intermediate stackable certificates and Associate's degrees along their journey to a Bachelor's degree, in addition to student enrollment choices. Institutions also differ in automatically awarding or asking students to opt-in to the awarding of intermediate stackable certificates.

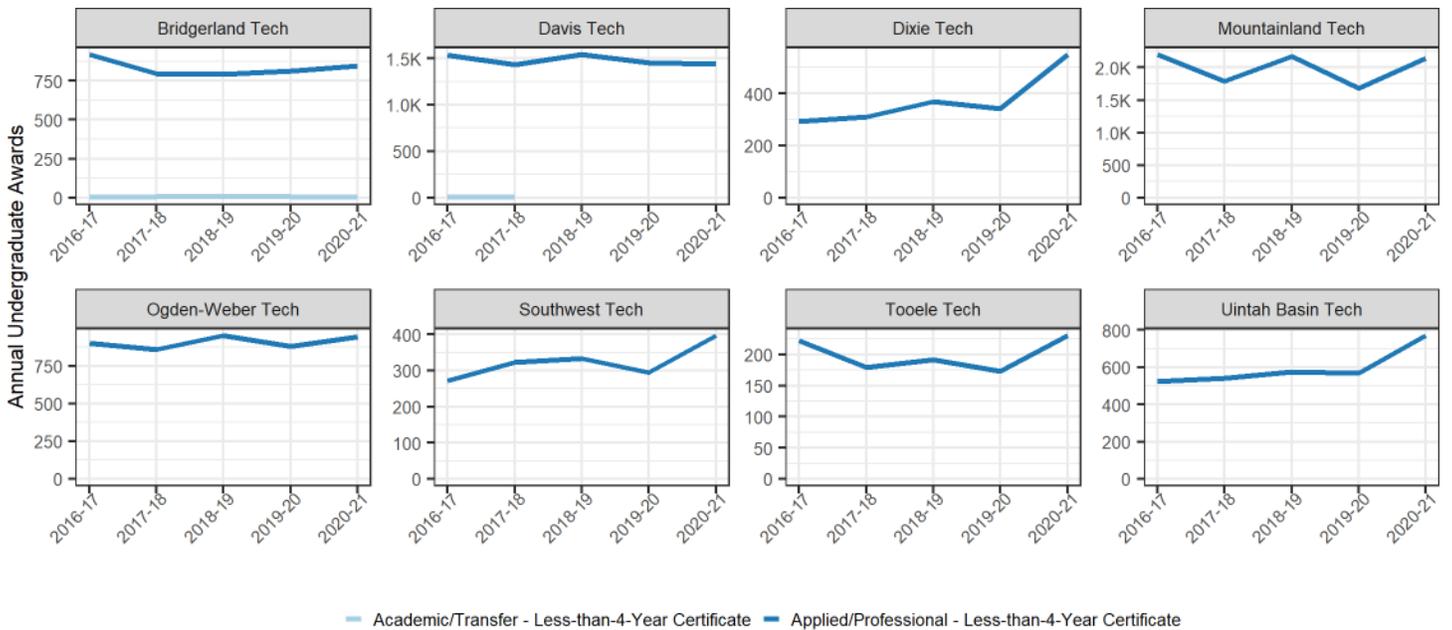
Figure 35. Degree-Granting Institutions Undergraduate Awards by Level and Type



— Academic/Transfer - Less-than-4-Year Certificate
 — Academic/Transfer - Associate's degree
 — Academic/Transfer - Bachelor's degree
— Applied/Professional - Less-than-4-Year Certificate
 — Applied/Professional - Associate's degree
 — Applied/Professional - Bachelor's degree

Source: NCES IPEDS Completions Survey, files cYYYY_a_2017-2020 final release files; 2021 provisional release
 Notes: Students who received multiple awards will be duplicated. Applied/Professional vs Academic/Transfer based on 2-digit CIP Code.

Figure 36. Technical colleges Awards by Level and Type

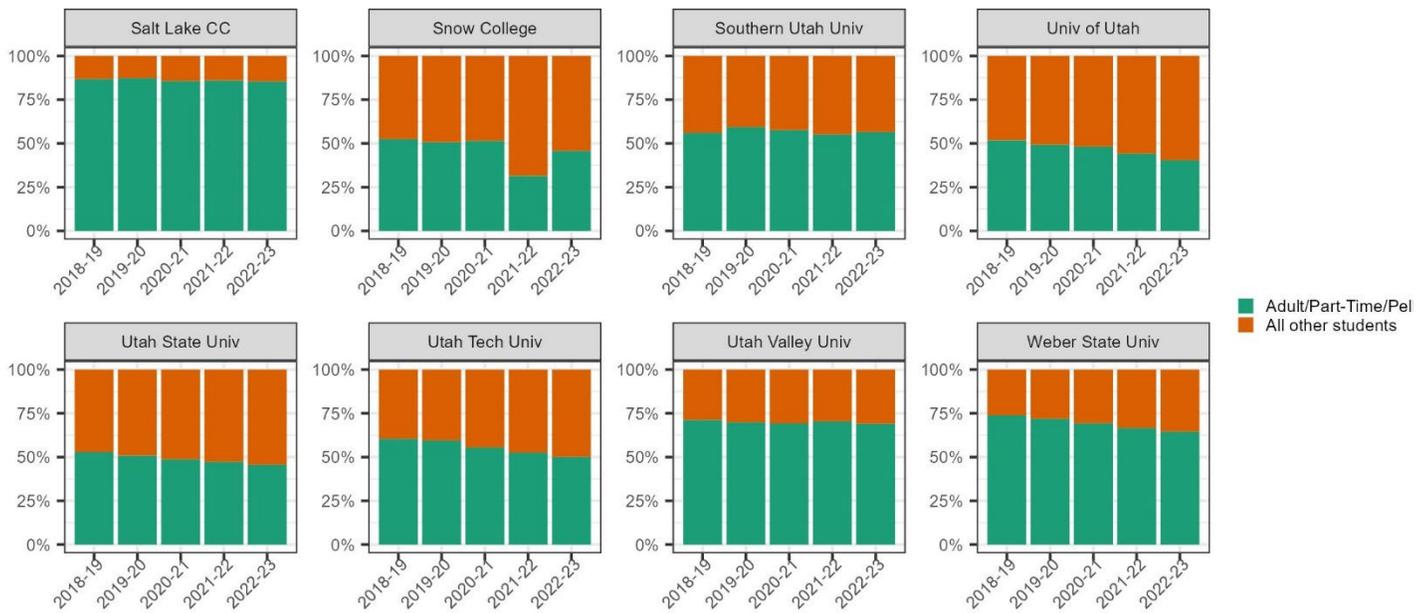


Source: NCES IPEDS Completions Survey, files cYYYY_a, 2017-2020 final release files; 2021 provisional release
 Notes: Students who received multiple awards will be duplicated. Applied/Professional vs Academic/Transfer based on 2-digit CIP Code.

Student Profiles

As noted above, enrollment decreases have largely taken place among part-time, adult, and Pell-eligible students. Some Utah institutions are more reliant on these populations than others. Approximately 85% of Salt Lake Community College's non-concurrent, undergraduate students fit into one of these three categories (attend part-time, are over age 25, and/or meet Pell eligibility criteria). This percentage is notably higher than that of any other USHE degree-granting institution (Figure 37).

Figure 37. Degree-Granting Institutions Undergraduate Fall Enrollment Over Time, Percentage Adult, Part-Time and/or Pell-Eligible



Source: USHE. Note: Excludes High School Students. Adult/Part-Time/Pell includes students who are in one or more of those categories.

The statewide enrollment decline in adult, part-time and Pell-eligible students is linked to the overall enrollment decline at Salt Lake Community College. Because SLCC's enrollment is heavily dependent on types of students that are generally enrolling in smaller numbers across most Utah institutions, its overall enrollment has declined more dramatically compared to other Utah institutions.

There could be many possible reasons for this decline. First, three of the past five years have been impacted by the COVID-19 pandemic. Institutions nationwide saw enrollments decline during that period, particularly among community college students, who are more likely to be Pell-eligible, above age 24, and attending part-time, among other characteristics. Given that Utah's enrollment declines among these groups started before 2020, this is likely not the only factor in play. Utah's growing economy and low unemployment rate may also be a contributing factor. Enrollment, particularly at community colleges, traditionally declines when the economy is strong because many students find it advantageous to work instead of enrolling in college. Finally, there are a number of additional questions that merit further research: Is college sufficiently affordable and accessible to working adults and low-income students in Utah? Are there institutional or statewide policies that could improve access for those populations? Does work need to be done to improve the college-going culture and reputation of higher education in Utah? It is possible that institutions and USHE are already working on answers to these questions, as NCHEMS' 2019 report to the Utah Higher Education Strategic Planning Commission made specific recommendations regarding affordability, service to adult learners, and strong public commitment to postsecondary attainment goals.¹²

¹² NCHEMS, <https://nchems.org/wp-content/uploads/191126-Utah-Strategic-Plan-Report-FINAL.pdf>

Conclusion

Utah is not alone in its interest in monitoring enrollment across its public postsecondary institutions. Postsecondary institutions across the country are concerned with enrollment levels and ensuring that people have access to quality postsecondary options. In this report, we find that Utah is unique in its growing enrollment among younger students either still in high school or recently graduating high school. Concurrent enrollment and an unusually robust supply of high school graduates could be contributing to the state staving off enrollment declines that have been seen in many other parts of the country.

In addition, population trends are impacting enrollment in the state. Institutions in fast-growing areas of the state have experienced more rapid enrollment growth than those in other areas. However, the percentage of residents attending college is not increasing, and is in fact declining in some regions. Further, while Hispanic/Latinx students are growing as a share of Utah's population, institutions have not kept pace with increasing enrollment of Hispanic/Latinx students.

These larger population trends are likely related to the trends that Utah institutions are seeing in their student populations. It is reasonable to view the statewide increase in full-time students, increase in students under the age of 25, and decrease in Pell-eligible students as secondary impacts of a robust high school graduate population.

While population projections indicate that the statewide population of Hispanic/Latinx Utahns will continue to increase, the same does not hold true for high school graduates. If the state of Utah is to continue to reach all Utahns with accessible postsecondary education options, reforming systems for inclusion of all students will be imperative.