

BEYOND THE CLIFF:
DEMOGRAPHIC SHIFTS,
MIGRATION TRENDS,
AND THE NEW REALITY
FOR NC COLLEGES

CAROLYN SLOANE
MATA, PH.D.

DIRECTOR OF
RESEARCH

NORTH CAROLINA
INDEPENDENT
COLLEGES AND
UNIVERSITIES

About Carrie:

Coordinator, Data and Research, ICUT

8 years as VP for Research at the Georgia Independent College Association

15 years working with Independent College Associations in NC, VA, LA, GA, TX, OR, SC

10 years as IPEDS Educator for NCES, frequent TRP invitee and served 3 years as TRP moderator

Served in IR at multiple institutions

Contracted with Lumina, SHEEO, UCMC, NECHE, and SREB on data projects





WELCOME

TO *Fabulous*

LAS VEGAS

NEVADA



**DEMOGRAPHICS
AHEAD**

**LOW
BIRTH
RATES**

**ENROLLMENT
DROP**

COLLEGE

CAUTION

**ENROLLMENT
DROP
ZONE**



The enrollment cliff isn't just about fewer applications—it's about fewer students, period.

This is a demographic shift 18 years in the making.

1. The Great Recession (2008–2009)
2. Long-term social and economic trends
3. Lower birth rates
4. Covid impact

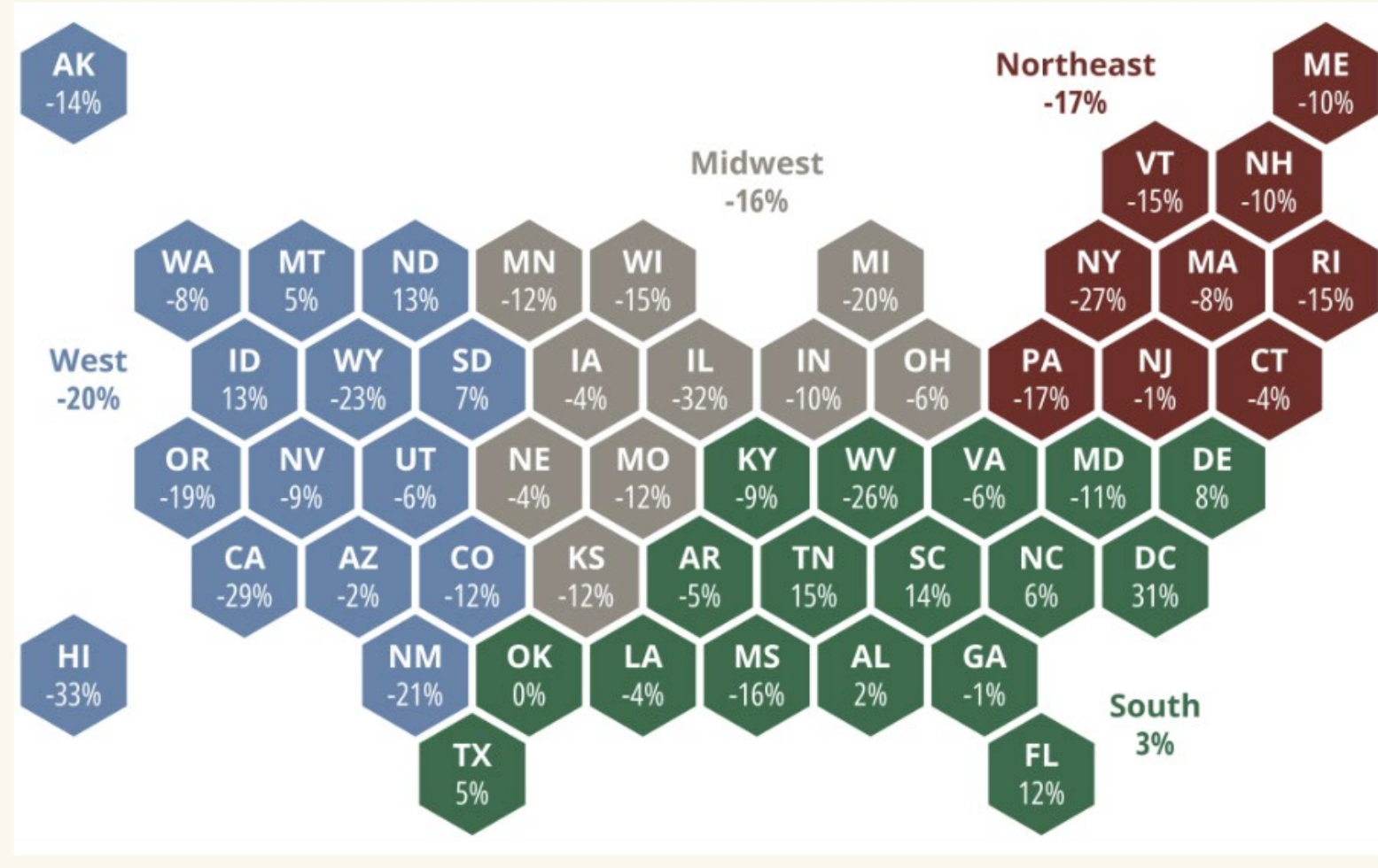
Fall 2025 International Student Enrollment Snapshot & Economic Impact

[Download a printable version](#)

**Updated Economic Analysis: Fall 2025 International
Student Enrollment Decline Reveals Drop of \$1.1
Billion and Nearly 23,000 Jobs**

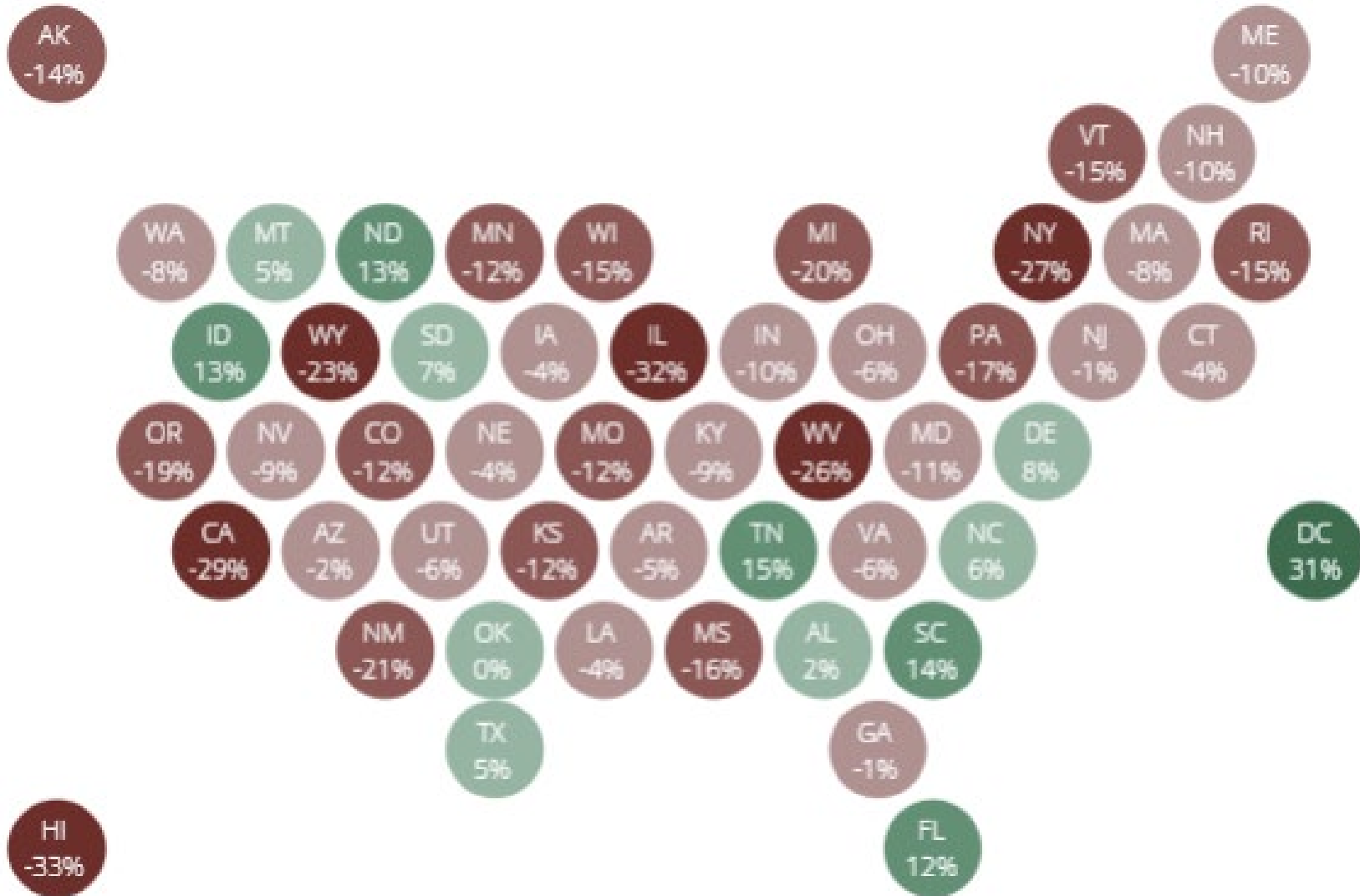
NATIONAL AND STATE-LEVEL SNAPSHOT

Projected percent change in high school graduates, 2023 to 2041



Projected percent change, 2023 to 2041

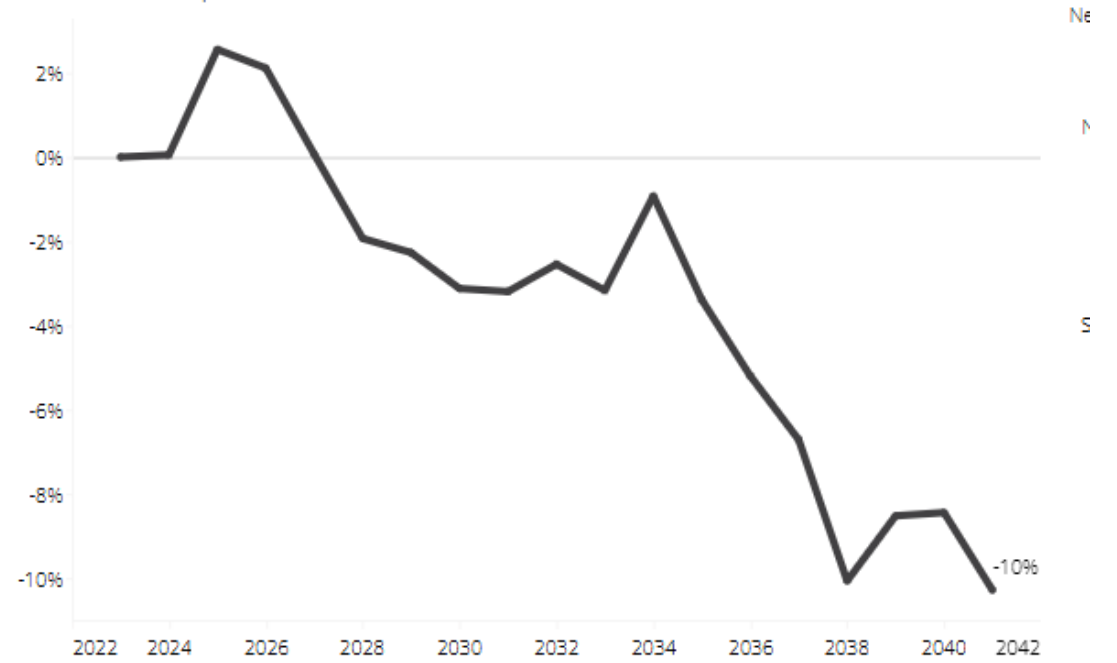
Select a state on the map to highlight on the bar chart and add to the line below





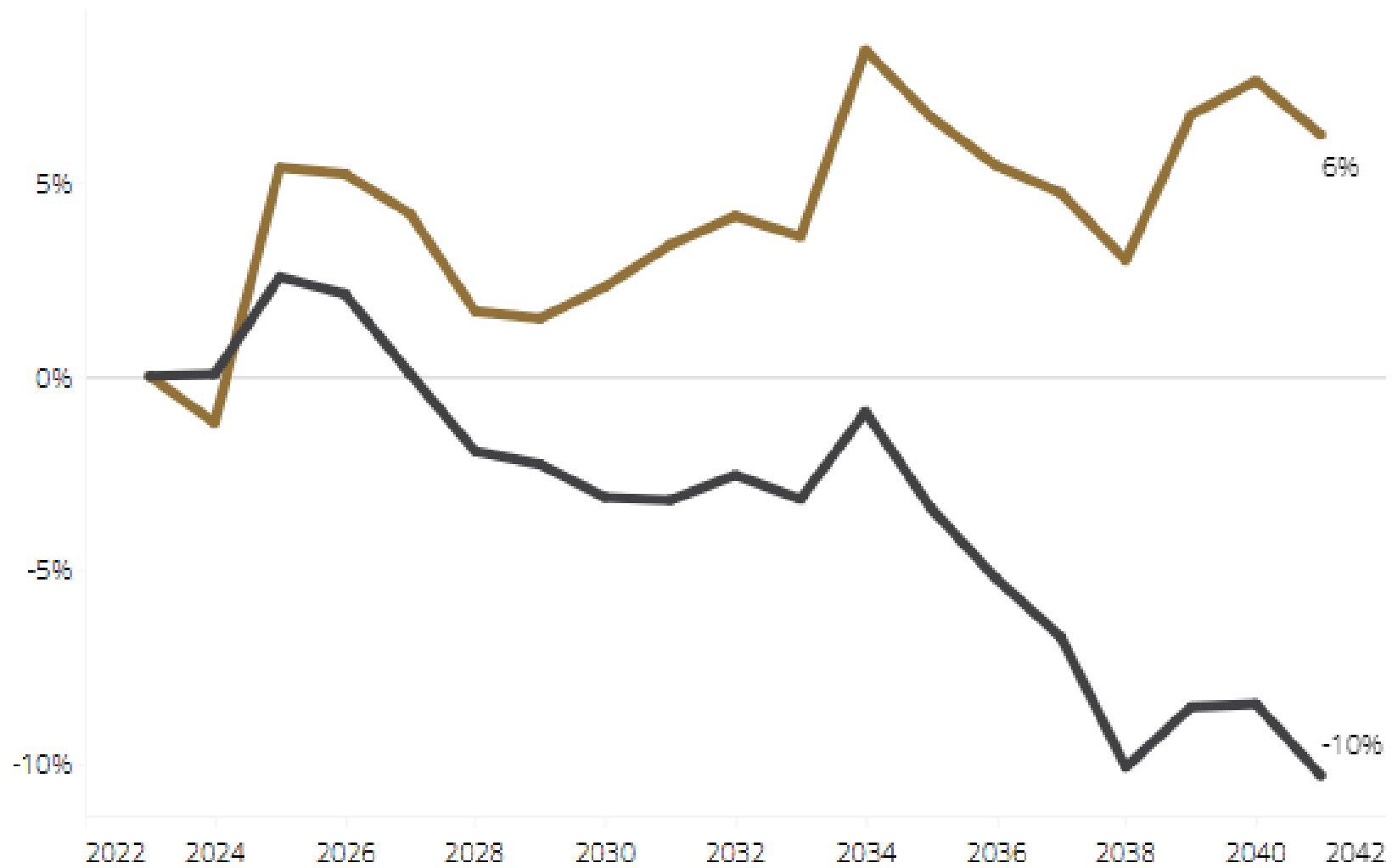
Projected percent change, 2023 to 2041

Select a state from the map above to add to this chart



Projected percent change, 2023 to 2041

Select a state from the map above to add to this chart



- Nation
- North Carolina

North Carolina High School Graduate Trends

► These charts display the projection of high school graduates for each school type and student population. Explore these trends in more detail for each selected state, region, and nation using the navigation icons above. Adjust the charts using the filters on the side.

Filters

Geography

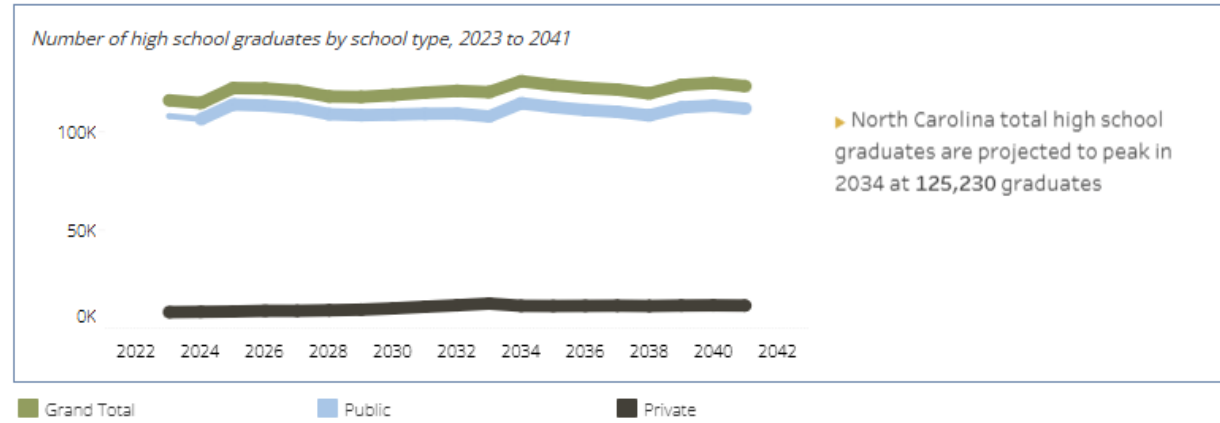
North Carolina

Graduation Years

2023 2041



High School Graduates by School Type



High School Graduates by Race and Ethnicity

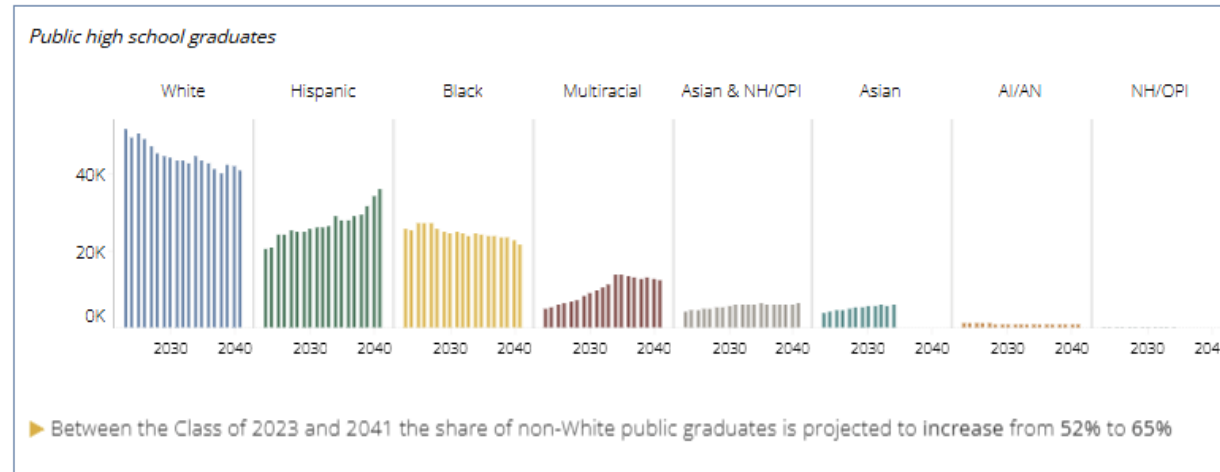


Table 04. Number of first-time degree/certificate-seeking undergraduate students enrolled, residence, and migration at Title IV institutions, by state or jurisdiction: Fall 2022

State or jurisdiction	Enrollment in institutions located in the state or jurisdiction	Residents of the state or jurisdiction enrolled in any state or jurisdiction ¹	Residents of the state or jurisdiction enrolled in the same state or jurisdiction	Percent enrolled in the state or jurisdiction who are residents of the same state or jurisdiction	Students of unknown residency enrolled in institutions located in the state or jurisdiction	Migration of students ²		
						Into the state or jurisdiction ³	Out of the state or jurisdiction	Net migration ⁴
Montana	8,861	6,840	4,890	55.2	25	3,946	1,950	1,996
Nebraska	18,058	17,827	13,399	74.2	141	4,518	4,428	90
Nevada	17,899	21,692	16,032	89.6	219	1,648	5,660	-4,012
New Hampshire	23,162	10,110	5,018	21.7	378	17,766	5,092	12,674
New Jersey	66,321	93,822	58,762	88.6	151	7,408	35,060	-27,652
New Mexico	16,508	16,665	13,584	82.3	268	2,656	3,081	-425
North Carolina	84,598	79,046	66,570	78.7		727		17,301
North Dakota	8,496	5,734	4,221	49.7	26	4,249	1,513	2,736
Ohio	99,445	91,222	76,121	76.5	552	22,772	15,101	7,671
Oklahoma	38,255	35,750	30,831	80.6	182	7,242	4,919	2,323
Oregon	33,735	30,081	23,602	70.0	259	9,874	6,479	3,395
Pennsylvania	110,082	97,554	74,612	67.8	527	34,943	22,942	12,001
Rhode Island	15,489	9,272	6,273	40.5	64	9,152	2,999	6,153
South Carolina	46,997	39,906	33,310	70.9	346	13,341	6,596	6,745
South Dakota	8,902	7,064	5,208	58.5	25	3,669	1,856	1,813
Tennessee	59,413	53,547	42,914	72.2	291	16,208	10,633	5,575

12,476

4,825

INSTITUTIONAL STRATEGY AND COMPETITION



Why we can't get comfortable:

The enrollment "level" is not equally distributed.

Highly selective and flagship institutions tend to have stronger brand recognition, more robust waitlists, and out-of-state recruitment pipelines.

Regional public universities and small private colleges are often more vulnerable.

Institutions with high discount rates, limited aid flexibility, or unclear value propositions will have trouble competing.

Those who have invested in affordability, branding, and outcomes storytelling are better positioned to weather the storm.



Why we can't get comfortable:

When in-state pipelines shrink, states—and their public universities—don't just downsize. They look across state lines to fill classrooms and balance budgets.

Institutions become more reliant on non-resident enrollment to offset in-state shortfalls.

States can't manufacture more high school grads—but they can recruit yours.

Out-of-state students have become part of many states' revenue strategy.



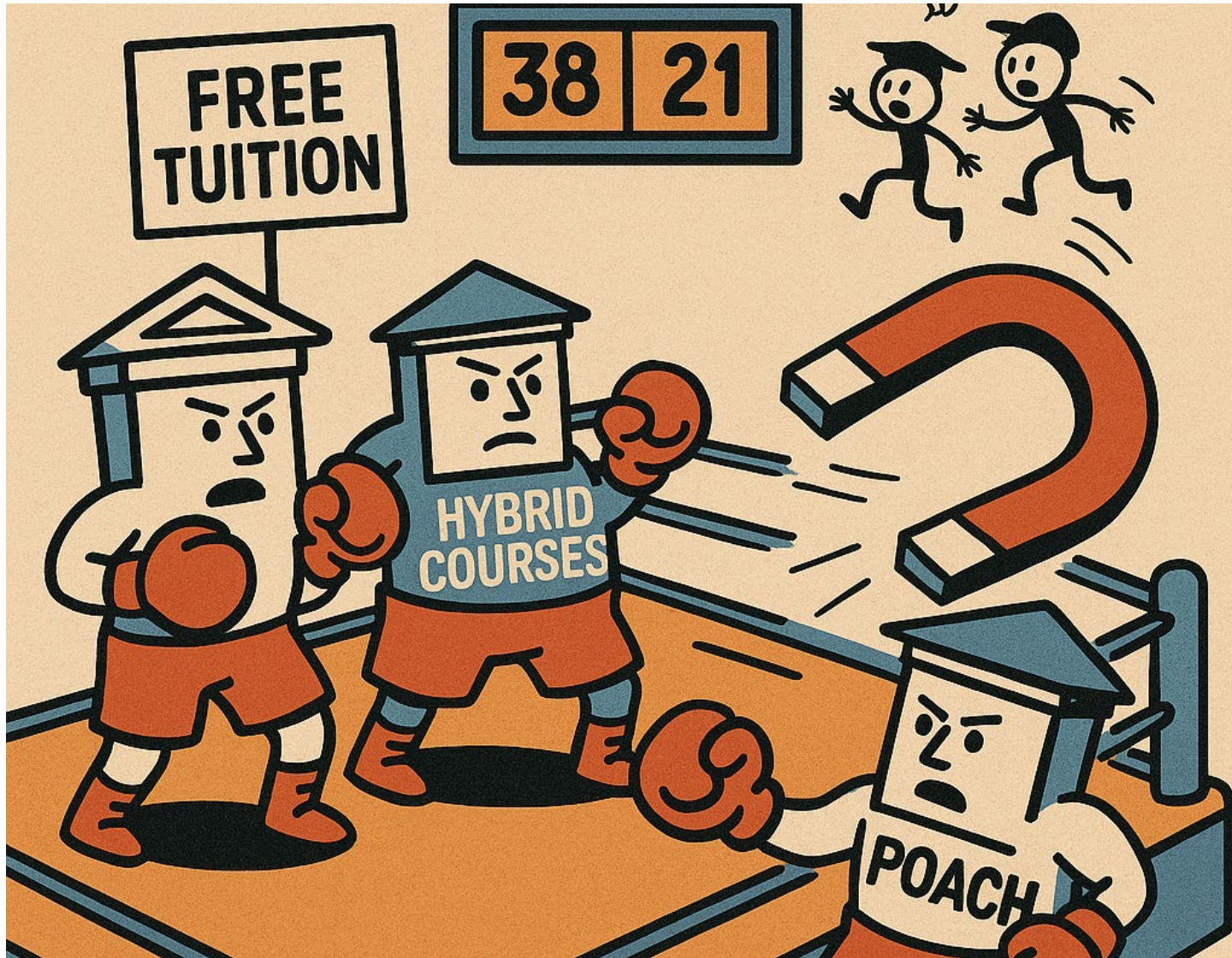
Why we can't get comfortable:

Outside colleges and universities begin to think creatively about how to attract talent.

Merit-based scholarships for non-residents that mimic in-state pricing.

Online and hybrid programs that reach students without physical relocation.

Institutions that pivot quickly—toward adult learners, online delivery, short-term credentials, or partnerships—are more resilient.



Why we can't get comfortable:

Students who once prioritized fit or mission may now prioritize cost and perceived prestige.

Institutions are using their scale and funding to recruit students you've historically served.

Large public institutions increasingly mimic small college experiences (e.g., honors colleges, small class sizes).

SOME EXAMPLES....

INTERNATIONAL PROGRAMS

HOME PROGRAMS - STUDY CENTERS FIRST YEAR / SEMESTER ABOUT US - PASSPORTS DONATE TO IP

FIRST YEAR & FIRST SEMESTER PROGRAMS



like taking the bravery to do your first year of college in different

Start your college experience in another culture, learning from world-class faculty, earning FSU credit, and making new friends! FSU International Programs offers first year and first semester study abroad experiences in four unique locations across the globe: **London, England; Florence, Italy; Panama City, Republic of Panama; Valencia, Spain.**

FIRST YEAR ABROAD

EARN IN-STATE TUITION AT FSU!

The First Year Abroad (FYA) program allows students to spend their first two semesters (Fall & Spring) at one of FSU's four incredible study abroad centers. Participants will benefit from small class sizes, experiential learning opportunities, and the chance to earn an out-of-state tuition waiver (non-FL residents) or a \$1,000 scholarship (FL residents).



Editorial Roundup: South Dakota

BY THE ASSOCIATED PRESS

Published 4:39 PM EDT, January 4, 2023

Share 📄

Yankton Press & Dakotan. January 3, 2023.

Editorial: Regents Plan To Extend Tuition Break A Good One

The South Dakota Board of Regents is attempting to bolster the numbers in its university system by extending its program to offer in-state tuition to out-of-state students.

Last month, the regents voted to add Illinois and Wisconsin to the South Dakota Advantage Plan, which offers in-state tuition rates to students from certain other states.

Other states covered on the Advantage Plan include Colorado, Iowa, Montana, Nebraska, North Dakota and Wyoming. (Meanwhile, Minnesota and South Dakota have a deal agreed to in 1978 in which Minnesota residents attending public university in South Dakota must pay the higher rate between resident tuition at the school at which they enroll or the average rate of nine Minnesota schools.)

The aim of the plan is to make South Dakota a more attractive option for students from other states.

Tennessee Reciprocity Tuition

Per the KY Council on Postsecondary Education, eligible students from Henry, Obion, Stewart, and Weakley Counties will be assessed the same tuition rate as a Kentucky resident. Students from these four counties will be treated as Kentucky students in relation to admission requirements and housing/dining policies.

Illinois, Indiana and Tennessee In-State Tuition

Students admitted from Massac County in Illinois, Posey, Vanderburgh or Warrick Counties in Indiana, and Montgomery County in Tennessee will be charged out-of-state tuition and given a tuition discount to adjust their tuition. Students will be treated as Kentucky students in relation to admission requirements and housing/dining policies. This discount does not apply to doctoral students.

Regional Tuition

Residents of Alabama, Arkansas, Florida, Georgia, Illinois, Indiana, Louisiana, Mississippi, Missouri, North Carolina, Ohio, South Carolina, Tennessee, Virginia, and West Virginia will be charged regional tuition and given a tuition discount to adjust their tuition.

All students attending Murray State University are required to [live on campus](#) for 2 years, 4 full time semesters (excluding summer).

Executive order “Improving Education Outcomes by Empowering Parents, States, and Communities” [Click here for current information and updates.](#)

[Home](#) / [Scholarships and Financial Aid](#) / [Types of Aid](#) / [Scholarships](#) / Competitive Scholarship Non-Resident Tuition Waiver

SCHOLARSHIPS AND FINANCIAL AID

Executive Order

- Types of Aid

+ Grants

- Scholarships

How to Apply

Maintaining Eligibility

+ Undergraduate Scholarships

+ Graduate and Professional
Scholarships

+ Veteran Scholarships

International Student Scholarships

Important Dates

**[Competitive Scholarship Non-
Resident Tuition Waiver](#)**

+ Additional Scholarships

Competitive Scholarship Non-Resident Tuition Waiver

The Competitive Scholarship waiver, authorized under Texas Education Code 54.213a, is an optional state waiver that institutions may offer. In this, an eligible degree-seeking non-resident student who holds competitive scholarships of a specified minimum dollar amount may be eligible to pay the fees and charges required of Texas residents without regard to the length of time the student has resided in Texas. The student must have applied for and competed with other students (including Texas residents) for the scholarships and the scholarships must be offered by a Texas A&M University college or department scholarship committee or authorized university representative.

- Per the Texas Higher Education Coordinating Board, an authorized scholarship committee must be officially recognized in writing by the institution’s administration to grant scholarships. The scholarship cannot be awarded by an external organization that controls the selection and funding process, such as a fraternity or a booster club.

Undergraduate students must be awarded and maintain competitive scholarships of at least \$4,000 per academic year in order to qualify for this waiver. Multiple competitive scholarships may be combined to fulfill the \$4,000 minimum for undergraduates; however, no single scholarship contributing to the \$4,000 minimum may be less than \$1,000 in value. Graduate and professional students must be awarded and maintain competitive scholarships of at least \$1,000 per academic year to qualify for this waiver. Multiple scholarships cannot be combined to meet the \$1,000 minimum for graduate students, the individual qualifying competitive scholarship must be \$1,000 or higher. Receipt of a competitive scholarship waiver, may result in adjustments to other financial aid offers.

STRATEGIC TAKEAWAYS

How can we close the gap?



The real opportunity as a nation lies in the college-going rate, not just the raw number of high school graduates.

Nationally, about 35% of high school graduates don't go to college—and this varies widely by region, income, and race/ethnicity. In some states, fewer than 50% of high school grads enroll in postsecondary education within a year.

Even a modest increase in college-going rates could significantly cushion the impact of the enrollment cliff.

Direct From High School College-Going Rates

Select Student State:

Select College Sector:

Select College Location:

Select Graph Type:

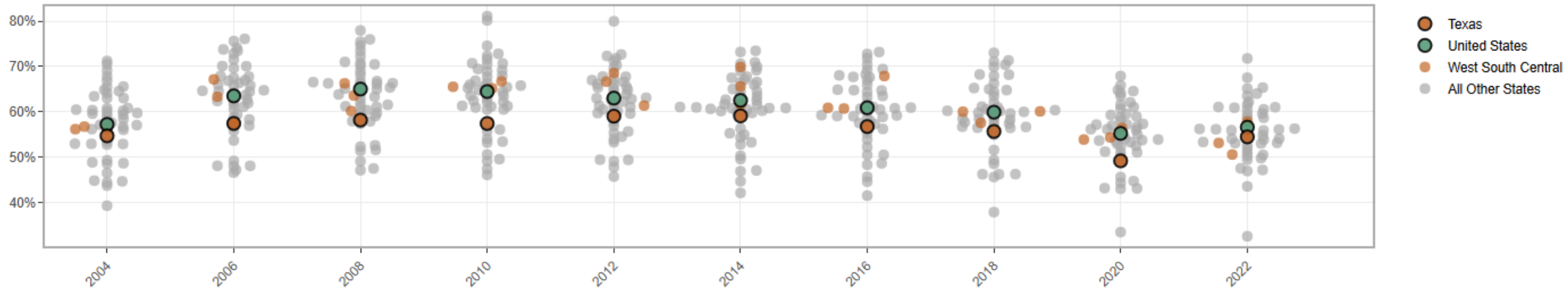
Texas

All

All

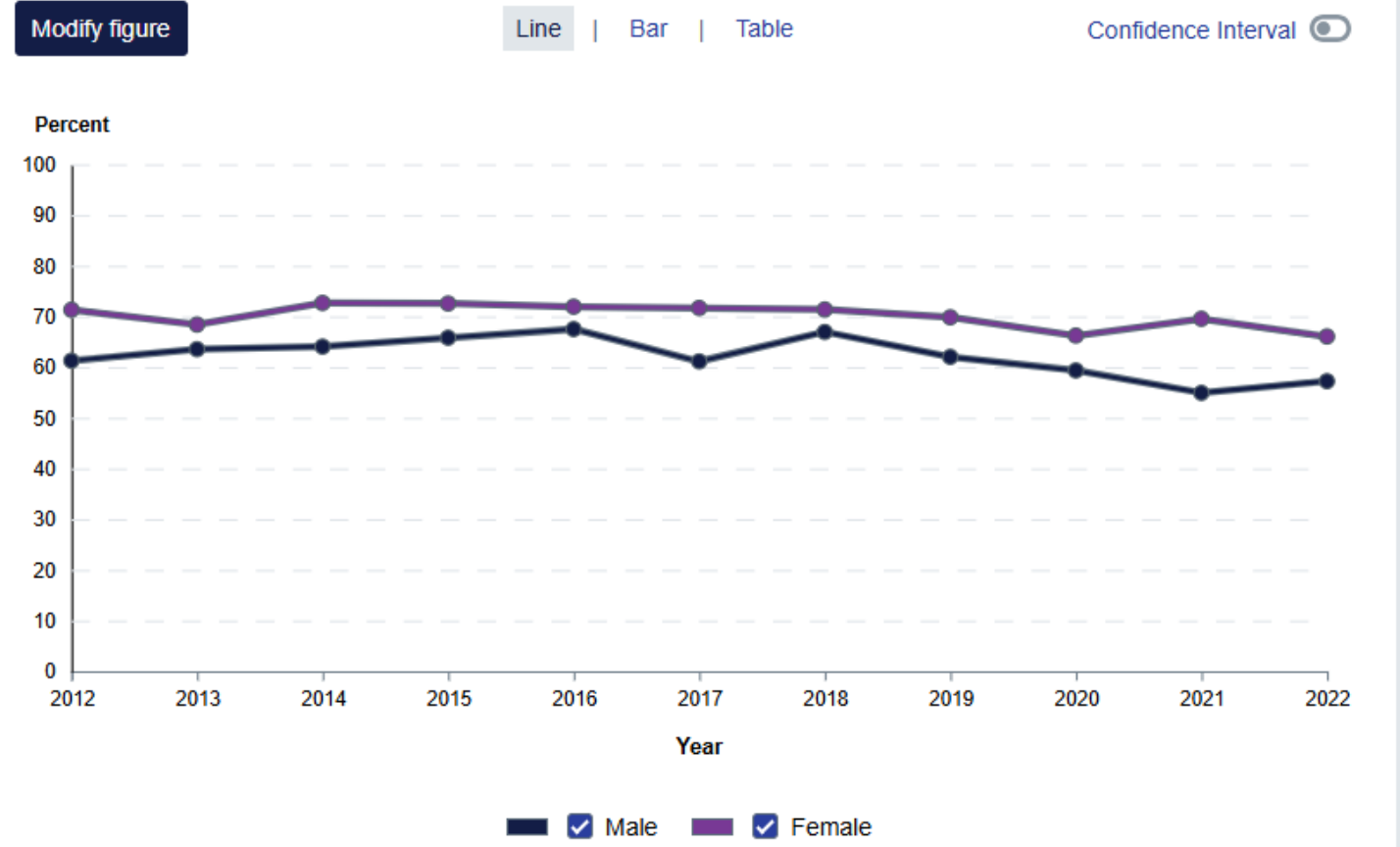
Dots

Direct-from-High-School College-Going Rates by State and Year
All Institutions; All Locations



Sources: WICHE Knocking at the College Door: Projections of High School Graduates 2024; NCES IPEDS final release Fall Residency and Migration Files eYYYYc. Notes: United States totals include students from the 50 states + DC. College enrollment includes Title IV institutions anywhere in the U.S., including territories.

Figure 2. Immediate college enrollment rate of high school completers, by sex: 2012 through 2022



NOTE: *Immediate college enrollment rate* is defined as the annual percentage of high school completers who are enrolled in 2- or 4-year institutions in the October immediately following high school completion. High school completers include 16- to 24-year-olds who graduated with a high school diploma as well as those who completed a GED or other high school equivalency credential. Figures are plotted based on unrounded data.

SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), October Supplement, 2012 through 2022. See *Digest of Education Statistics 2023*, table 302.10.

Number of applications for admission from first-time, degree/certificate-seeking undergraduate students were received by postsecondary institutions in the fall by gender

Line | Bar | Stacked bar | Table

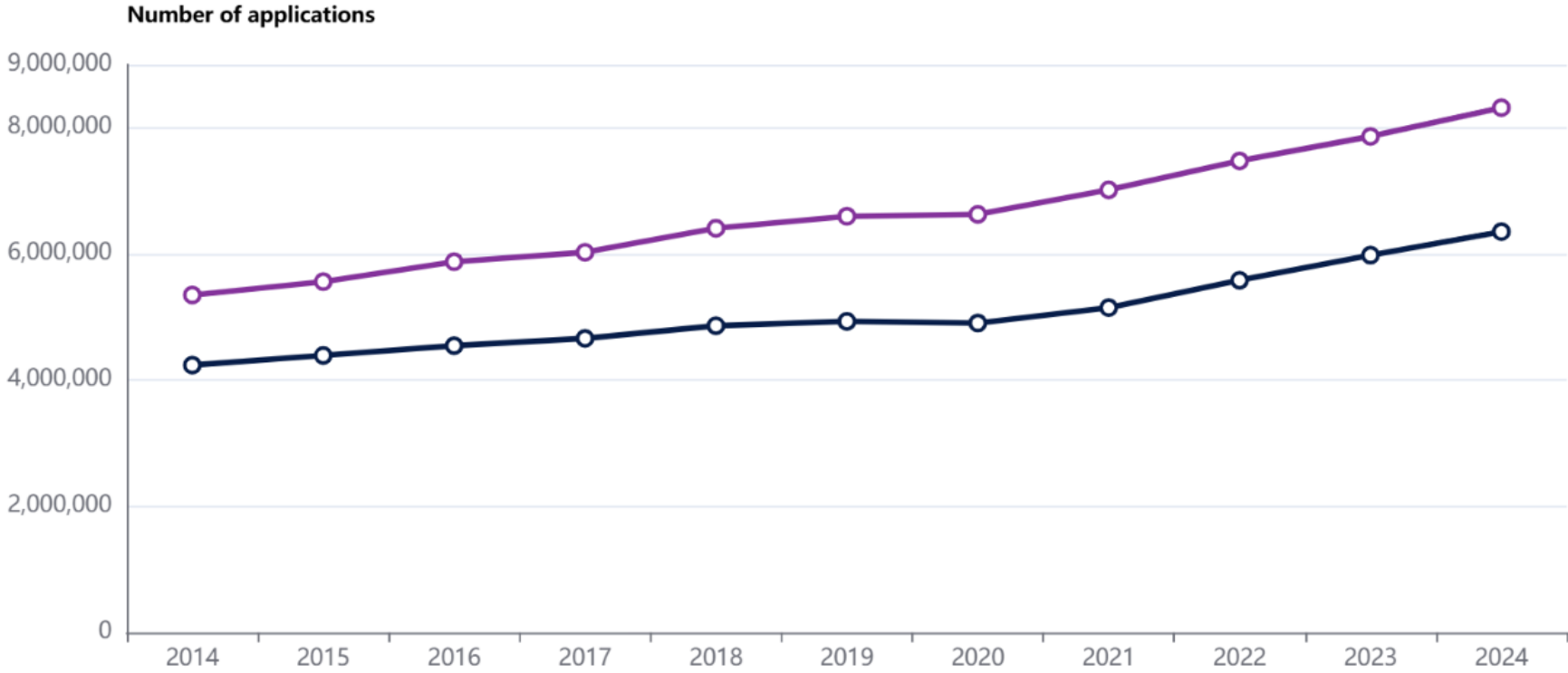
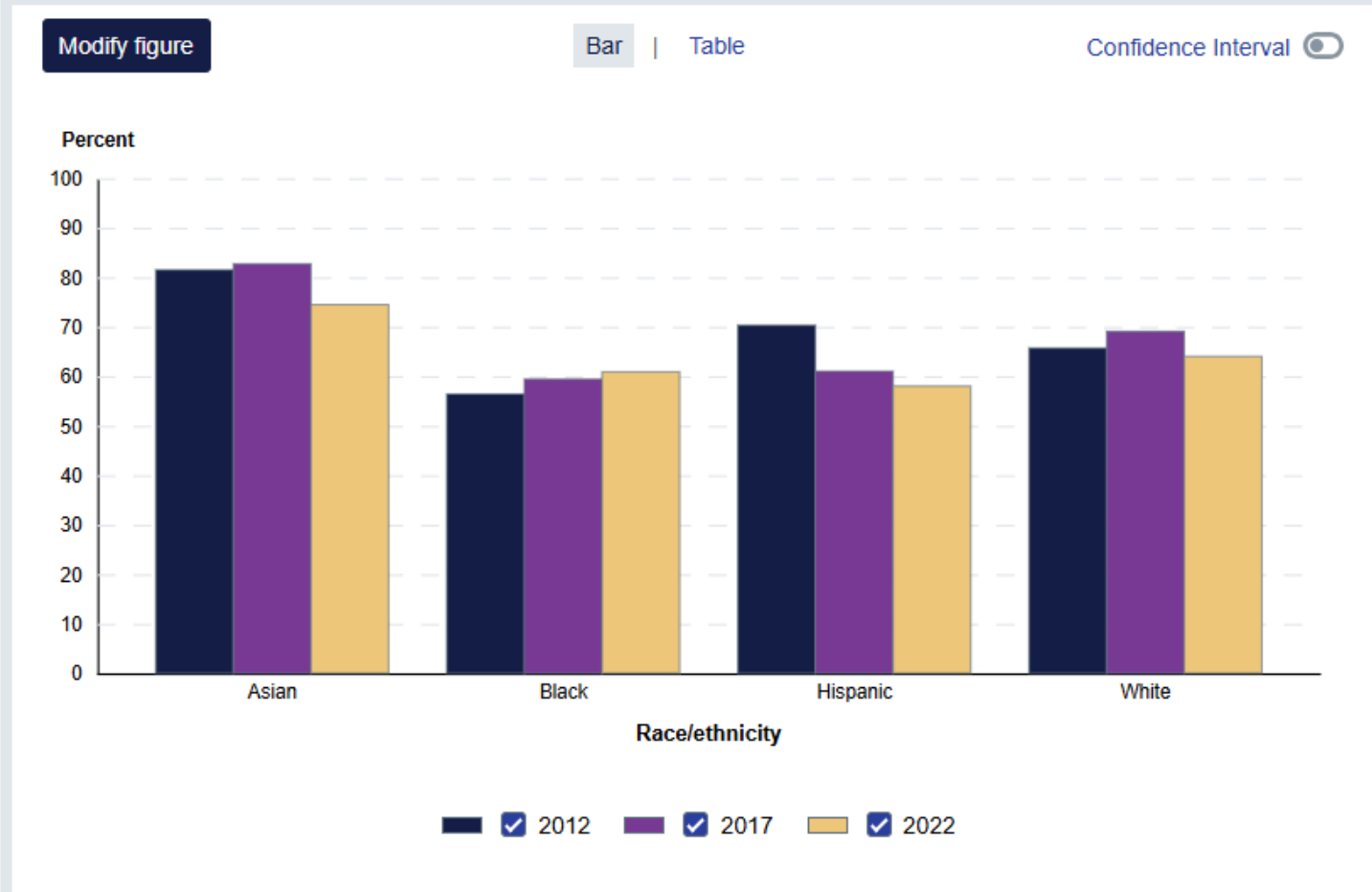


Figure 3. Immediate college enrollment rate of high school completers, by race/ethnicity: 2012, 2017, and 2022



NOTE: *Immediate college enrollment rate* is defined as the annual percentage of high school completers who are enrolled in 2- or 4-year institutions in the October immediately following high school completion. High school completers include 16- to 24-year-olds who graduated with a high school diploma as well as those who completed a GED or other high school equivalency credential. Race categories exclude persons of Hispanic ethnicity. Figures are plotted based on unrounded data.

SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), October Supplement, 2012, 2017, and 2022. See *Digest of Education Statistics 2023*, table 302.20.

What can you do?

1. Tell our story better/clarify ROI
2. Lean into your mission
3. Know your audience/clientele/student
4. Diversify and expand recruitment pipelines
5. Improve retention to preserve enrollment and track transfer-out students to learn where they go and why
6. Invest in attracting transfer students
7. Re-evaluate discounting practices
8. Innovate academic offerings and delivery
9. Enhance community and employer partnerships
10. Reimagine admissions and messaging
11. Use data and scenario planning to lead strategically



Thank you!

CAROLYN SLOANE MATA, PH.D.

Email: mata@ncicu.org

LinkedIn: <https://www.linkedin.com/in/carolyn-mata-phd-1aa5b023/>