

# RESEARCH REPORT

AUGUST 2021, REVISED SEPTEMBER 2021 | 21-2

## ANNUAL ENROLLMENT SUMMARY 2020-21

Washington's community and technical colleges (CTCs) enrolled 278.4 thousand students in academic year (AY) 2020-21, down 18 percent compared with the prior year. On a full-time equivalent student (FTES) basis, CTCs enrolled 144.3 thousand FTES, down 11 percent from last year. As discussed in this report, and noted in previous pandemic-era research reports, enrollment declines were more pronounced among certain programs and demographic groups than others.

The enrollment drop is not unique to Washington. The National Student Clearinghouse reports spring-to-spring enrollment among public two-year colleges was down 9.5 percent nationally.<sup>1</sup> Community colleges have been the hardest-hit higher education sector; public four-year institutions experienced a -0.6 percent spring-to-spring enrollment change, for example. There may be several explanations for declining enrollment at community colleges, but according to a survey by Gallup, Inc., lack of interest is not one of them. The Strada Education Network, who commissioned the Gallup survey, estimates 20.5 million US adults between ages 25 and 64 intend to enroll at a CTC in the next two years.<sup>2</sup>

In Washington state, American Community Survey data suggests 1.6 million adults, or 30.7 percent of those ages 25 and older, have not attended college, including 442 thousand adults who have not yet received a high school credential.<sup>3</sup> The pandemic affected the diverse communities CTCs serve differently, and the circumstances surrounding the decline in CTC enrollment continue to evolve, but the population that would benefit from a CTC education remains. As Dr. Michael Baston, President of Rockland Community College in New York, said of community colleges in response to the Strada survey, "When you think about it, it is interesting that we're seeing that there's still a lot of demand. Well that's because hopes and dreams didn't go away because the pandemic came. People do want to get ahead. People do want to have the life that they deserve."

This report discusses the enrollment changes experienced across the system last year, noting the diverging enrollment patterns among certain programs and populations. Further, considering the system's focus on improving students' lives through employment opportunities, as well as the extreme changes experienced in the Washington and national labor markets, it is also important to understand potential enrollment demand from those whose employment was affected by the pandemic. The second section discusses the shifts and recoveries seen over the last year across industries and how they differ from prior recessions. There may be many other factors to consider, but this report intends to arm stakeholders with some perspective and data from a highly unusual time as colleges reflect on the year and prepare for the recovery that lies ahead.

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<sup>1</sup> [https://nscresearchcenter.org/wp-content/uploads/CTEE\\_Report\\_Spring\\_2021.pdf](https://nscresearchcenter.org/wp-content/uploads/CTEE_Report_Spring_2021.pdf)

<sup>2</sup> <https://stradaeducation.org/invest-now/>

<sup>3</sup> US Census Bureau, American Community Survey 2019 Five-year Estimates

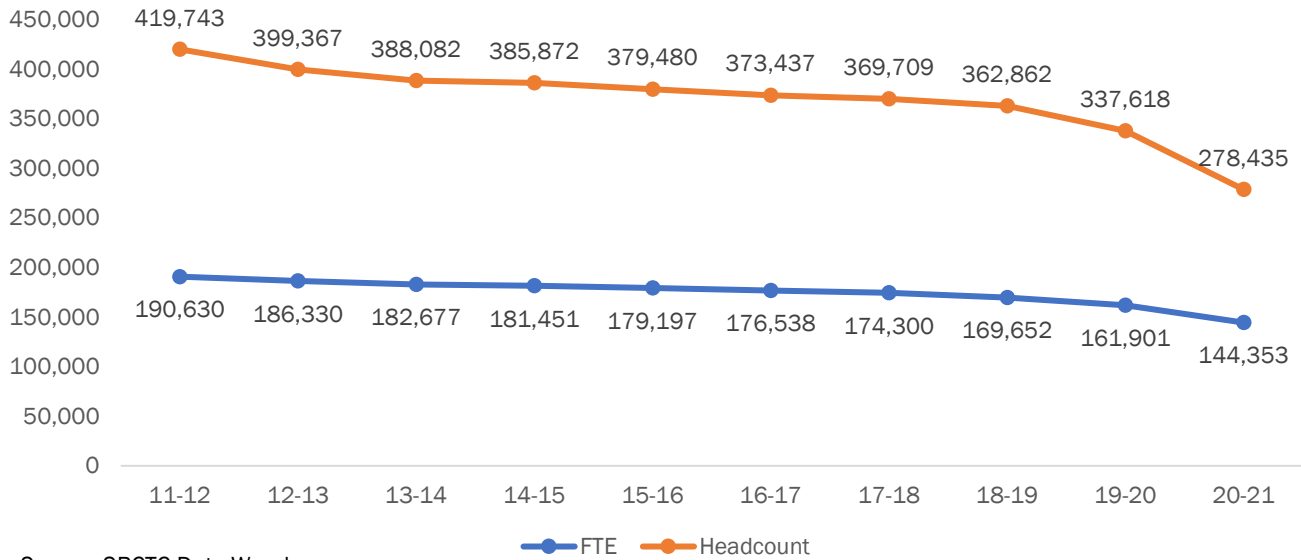
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## 2020-21 Enrollment

System-wide CTC enrollment has been declining over the last decade, with an acceleration to these declines in the last two years due to the COVID-19 pandemic and related mitigation measures. Headcount in 2020-21 was down 18 percent from 2019-20. For comparison, headcount declines between AY 2011-12 and AY 2018-19 ranged from -5 percent to -1 percent year over year. FTE enrollment declined by 11 percent, compared with the -3 percent to -1 percent year-over-year percent changes seen in the decade preceding the pandemic.

Figure 1. WA CTC System Headcount and Full-time Equivalent Enrollment, AY 2011-12 to AY 2020-21

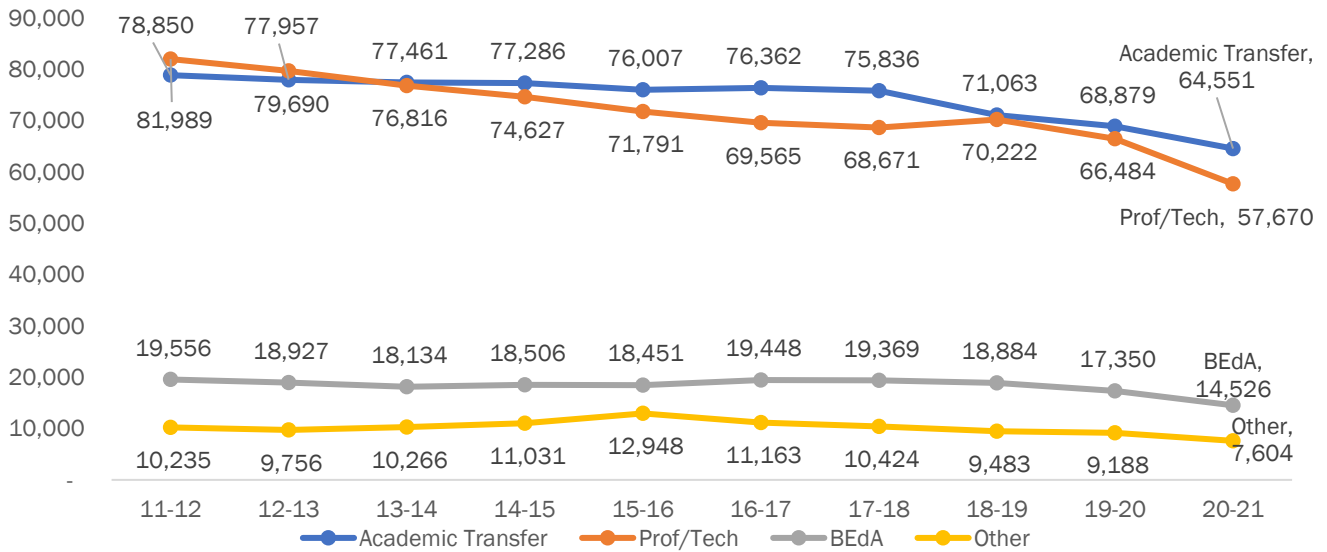


Source: SBCTC Data Warehouse

## Program and Course Characteristics

Professional/Technical program enrollment experienced more pronounced enrollment declines than Academic Transfer programs. Prof/Tech FTES were down 13 percent in AY 2020-21, more than twice the decline of the Academic Transfer FTES year-over-year percent change of -6 percent. Basic Education for Adults (BEaA) FTE enrollment dropped 16 percent, and FTE enrollment in other programs was down 17 percent. These trends have carried forward from spring quarter of 2020 and appear to be influenced by operating conditions at the colleges – Academic Transfer programs likely translate more easily to a remote learning environment, for example.

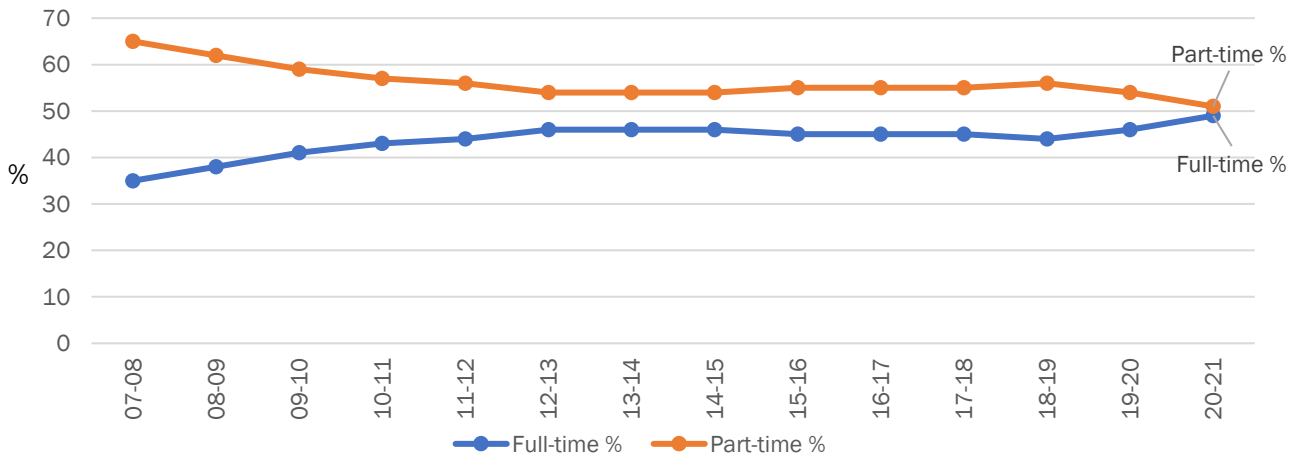
Figure 2. FTE Enrollment by Mission Area



Source: SBCTC Data Warehouse

For the last 10 years, most students (between 54 percent and 57 percent) were part-time. In AY 2020-21, however, this ratio came close to evening out, as 51 percent of students enrolled part-time, and 49 percent took a full-time course load. This appears to be a result of the declining Professional/Technical student population. Just under two-thirds of Academic Transfer students attend full-time, versus half of Professional/Technical students.

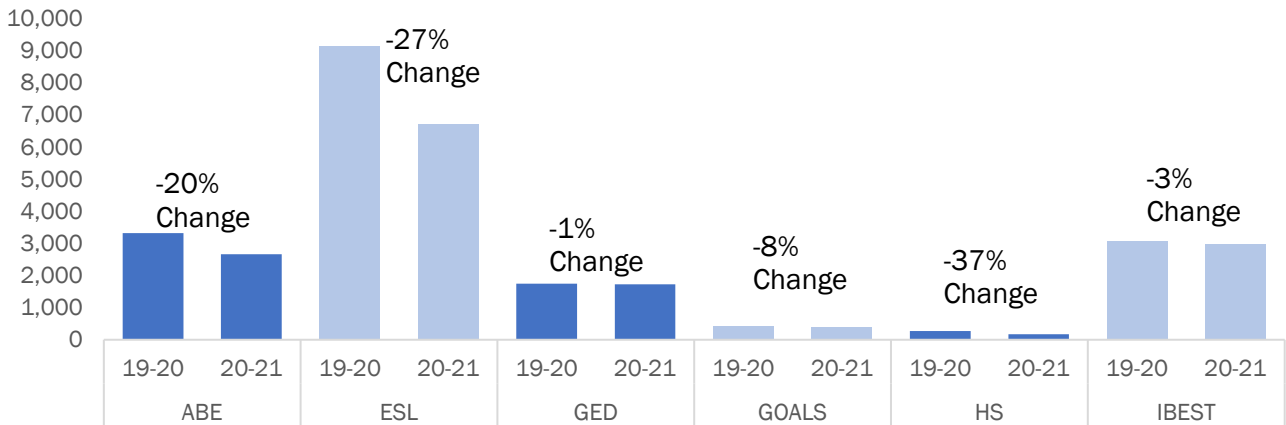
Figure 3. Percent of Headcount by Full-time/Part-time Status



Source: SBCTC Data Warehouse

Among BEdA enrollments, English language acquisition program enrollment declined the most, -27 percent, while Adult Basic Education FTE enrollment was down 20 percent. I-BEST and GED enrollments were down a comparatively small amount, -3 percent and -1 percent respectively. I-BEST actually showed promising signs of improvement late in the academic year, increasing slightly in spring 2021 compared to the same quarter a year before.

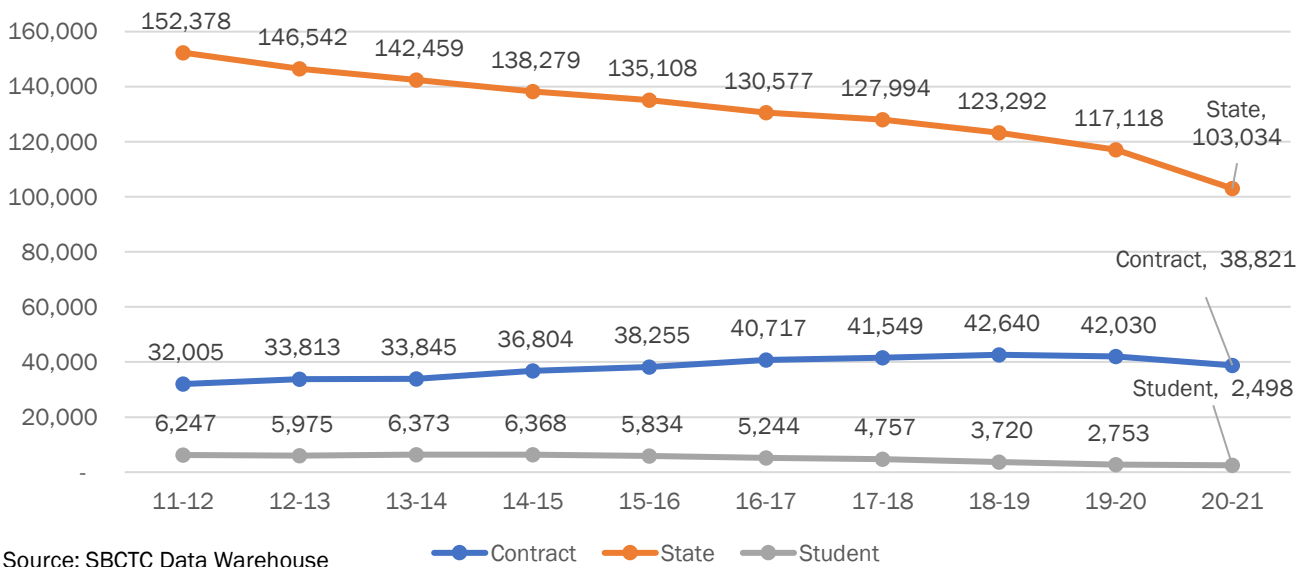
Figure 4. FTE Enrollment by BEdA Course Type



Source: SBCTC Data Warehouse

With regard to fund source, State-funded FTE enrollment, which has been declining steadily over the last decade, suffered the largest percent loss in AY 2020-21. Colleges enrolled 103 thousand state-funded FTES in AY 2020-21, down 12 percent year over year. Contract-funded enrollment, which conversely had shown year-over-year upticks in recent years, declined 8 percent in AY 2020-21, and student-funded enrollment continued its downward trend, dropping 9 percent.

Figure 5. FTE Enrollment by Fund Source

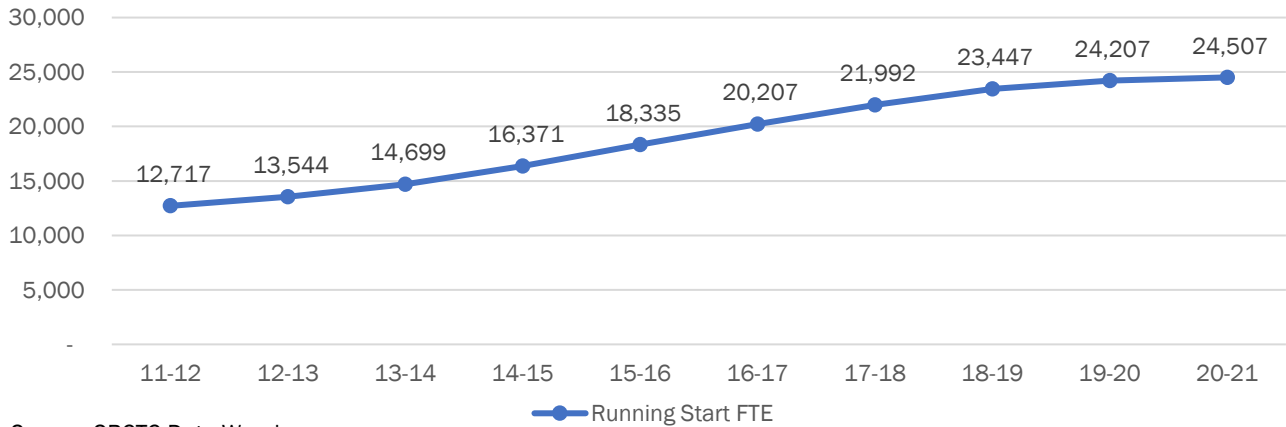


Source: SBCTC Data Warehouse

Contract State Student

Growth in contract-funded enrollment over the last decade has been largely driven by Running Start FTE, which experienced 6.5 percent to 12 percent year-over-year growth between AY 2011-12 and AY 2018-19. Running Start FTE still grew in AY 2020-21, though at a lower rate of 1.2 percent.

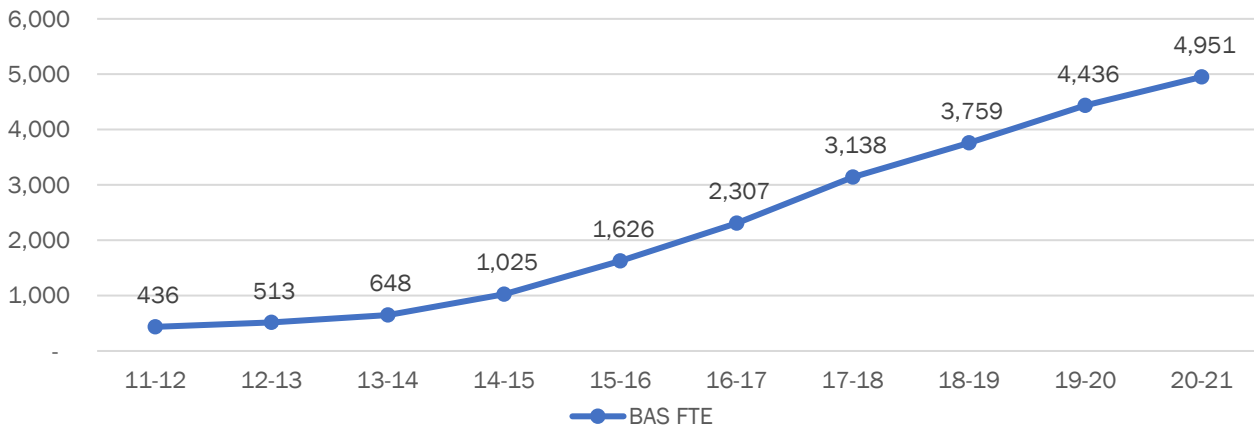
Figure 6. Running Start FTE Enrollment



Source: SBCTC Data Warehouse

In addition to Running Start FTE, Bachelor of Applied Sciences (BAS) programs continue to see year-over-year increases. Bachelor of Applied Sciences FTE enrollment increased 12 percent in AY 2020-21, a slower rate of growth than in prior years, but still a positive sign in the current enrollment environment.

Figure 7. Bachelor of Applied Science FTE Enrollment

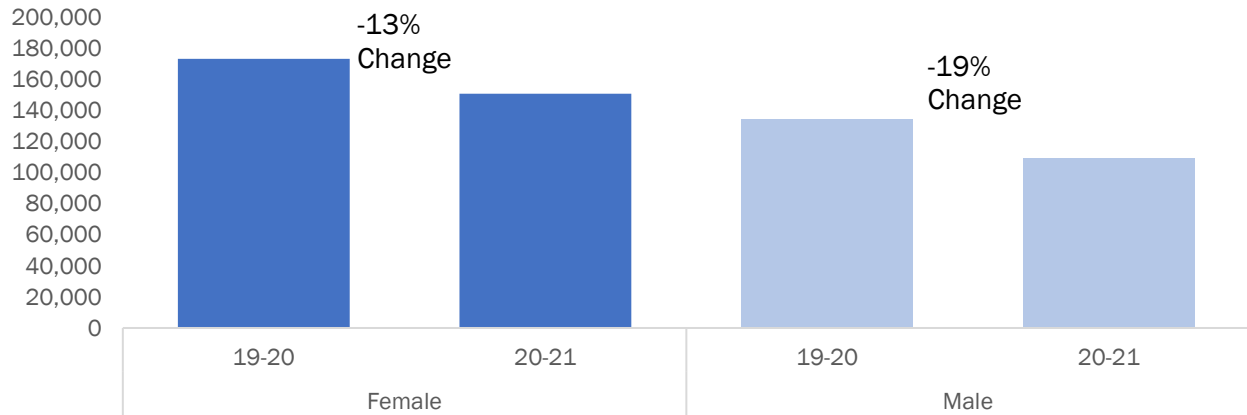


Source: SBCTC Data Warehouse

### Demographics

Enrollment among students identifying as male declined 19 percent compared with last year, while female enrollment dropped 13 percent. Female students comprised a majority of CTC student enrollment at 54 percent of the student population in 2020-21, up from 51 percent in 2019-20.

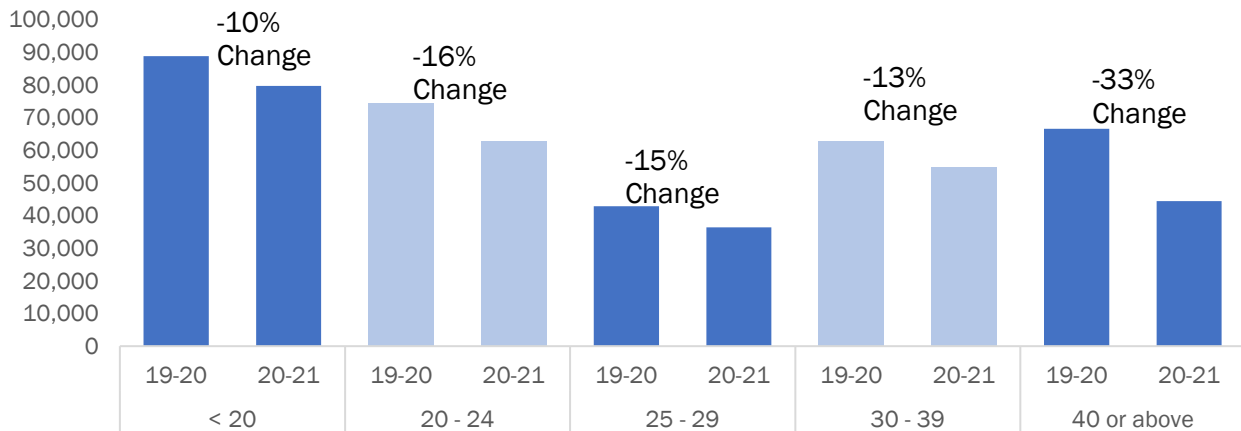
Figure 8. Headcount Enrollment by Gender



Source: SBCTC Data Warehouse

Most Professional/Technical students (58 percent) are above the age of 25, compared with 26 percent of Academic Transfer students, so the enrollment declines seen in Professional/Technical programs are also evidenced in the receding enrollment among higher age groups this year. Enrollment by students ages 25 and older declined 21 percent, while enrollment in age groups younger than 25 was down 13 percent. The largest drop was among students ages 40 and older, -33 percent.

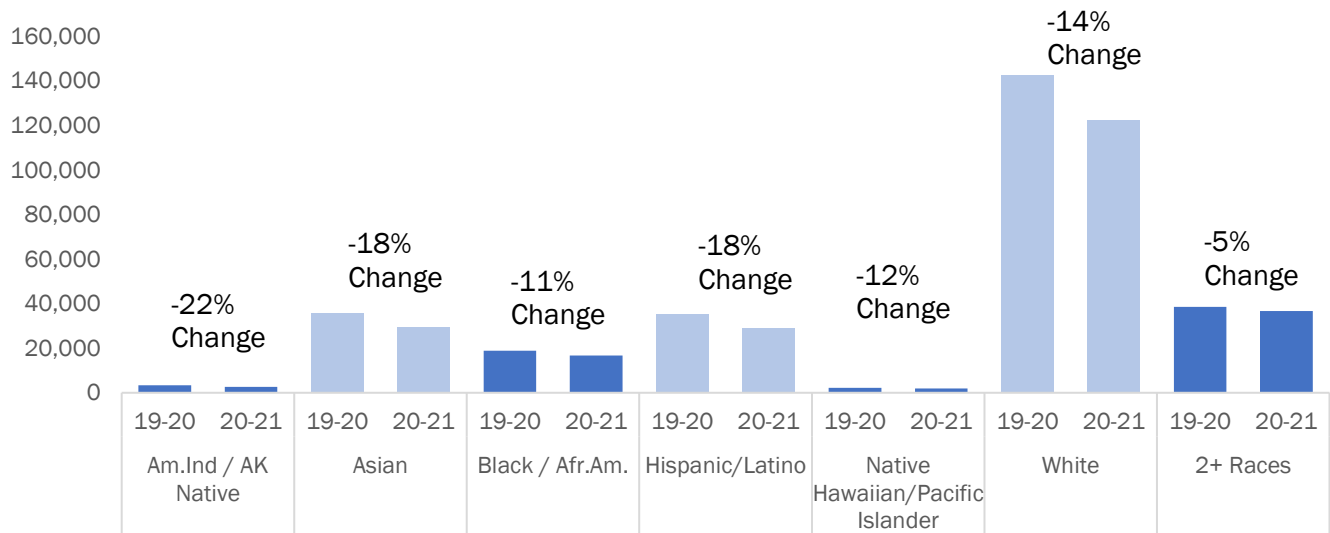
Figure 9. Headcount Enrollment by Age Group



Source: SBCTC Data Warehouse

Across race/ethnicity groups, students identifying as American Indian or Alaska Native experienced the largest percent decline year over year, -22 percent, while students identifying as Asian and Hispanic or Latino experienced year-over-year enrollment declines of 18 percent. Some enrollment changes may be masked by the higher proportion of students who reported their race/ethnicity this year – 85.6 percent of students reported their race/ethnicity in AY 2020-21 compared with 81.8 percent in AY 2019-20.

Figure 10. Headcount Enrollment by Race/Ethnicity



Source: SBCTC Data Warehouse

### Employment Conditions

The decline in Professional/Technical enrollment in AY 2020-21 coincided with extreme conditions in the labor market. Higher education experts often look to the labor market as a counterweight to postsecondary enrollment – when jobs are scarce or layoffs prevalent, enrollment is expected to rise as students retool for a more competitive labor landscape. This relationship has been documented by researchers,<sup>4</sup> though location<sup>5</sup> and the displaced individual’s former occupation<sup>6</sup> likely carry greater weight in the decision to enroll at a postsecondary institution.

During the employment shifts caused by the COVID-19 response, however, this anticipated interaction between the labor market and CTC enrollment in AY 2020-21 did not materialize, despite record high unemployment rates and unemployment insurance claims well beyond the ordinary range of measurement. Likely explanations include the distinct conditions leading to lower overall employment, challenges faced by higher education institutions navigating virus mitigation measures, substantial government support to both businesses and individuals intended to counteract the negative effects of business shutdowns, and a markedly rapid labor market recovery in several key industries. The relationship between enrollment and employment also tends to lag by several months or years, so more time is needed to properly assess the changing labor market’s influence on CTC enrollment.

Despite the absence of the familiar employment-enrollment tug of war, it is still worth surveying the current labor market for clues on what colleges can expect as Washingtonians look toward the post-pandemic

<sup>4</sup> Foote A, Grosz M. The Effect of Local Labor Market Downturns on Postsecondary Enrollment and Program Choice. *Education Finance and Policy* October 2020.

<sup>5</sup> Sorensen LC, Hwang M. The Importance of Place: Effects of Community Job Loss on College Enrollment and Attainment Across Rural and Metropolitan Regions. *AERA Open*. January 2021.

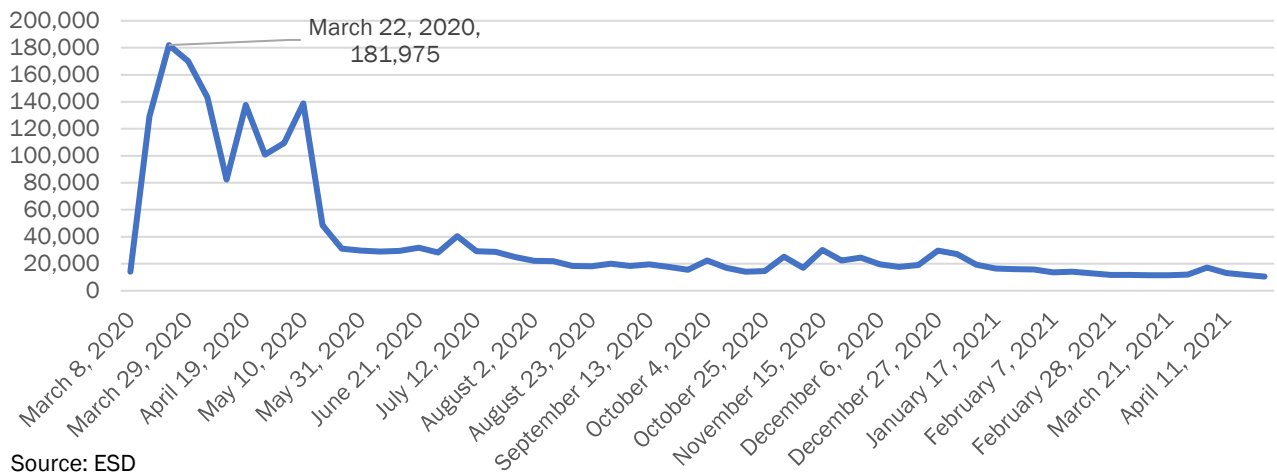
<sup>6</sup> Minaya V, Moore B, Scott-Clayton J. The Effect of Job Displacement on College Enrollment: Evidence from Ohio. NBER Working Paper No. 27694. August 2020, Revised September 2020.

horizon. This section will first look at one of the more commonly used leading indicators in the labor market, initial unemployment claims, to understand the early impacts of the COVID-19 response on Washington workers. Next, we'll explore labor force estimates, comparing the COVID-19 recession to the Great Financial Crisis of 2008 to demonstrate the relatively rapid recovery of several key industries served by Washington CTCs. Finally, this section includes analysis of several factors that may impact enrollment moving forward and opportunities for colleges to play a significant role in the post-pandemic recovery.

## Employment Conditions

Initial unemployment claims data can provide perspective on individuals who recently experienced reduced hours or lost employment and therefore may be good candidates for CTC enrollment to prepare for their next occupation. However, further labor market data paints a more complicated picture, discussed later in this section. The number of initial unemployment insurance claims in Washington increased to record levels toward the start of the pandemic, dwarfing pre-pandemic initial claims within weeks by a factor of 28 (182 thousand claims the last week of March 2020 compared with 6.5 thousand the first week of that same month).<sup>7</sup> This rapid acceleration in claims was followed by swift decline and eventual tapering. Figure 11 illustrates Washington state's initial unemployment claims over the one-year period since COVID mitigation measures began (March 8, 2020 through April 24, 2021). During this period, 1.4 million Washingtonians filed an unemployment insurance claim, which roughly translates to 1 in 4 working-age adults. As of August 2021, initial claims have returned to pre-pandemic levels, about 5,000 claims per week. Note that some claimants may submit more than one claim over the course of the year.

Figure 11. Washington Initial Unemployment Claims March 8, 2020 through April 24, 2021



Source: ESD  
<https://esd.wa.gov/labormarketinfo>  
 Some claimants submit multiple claims

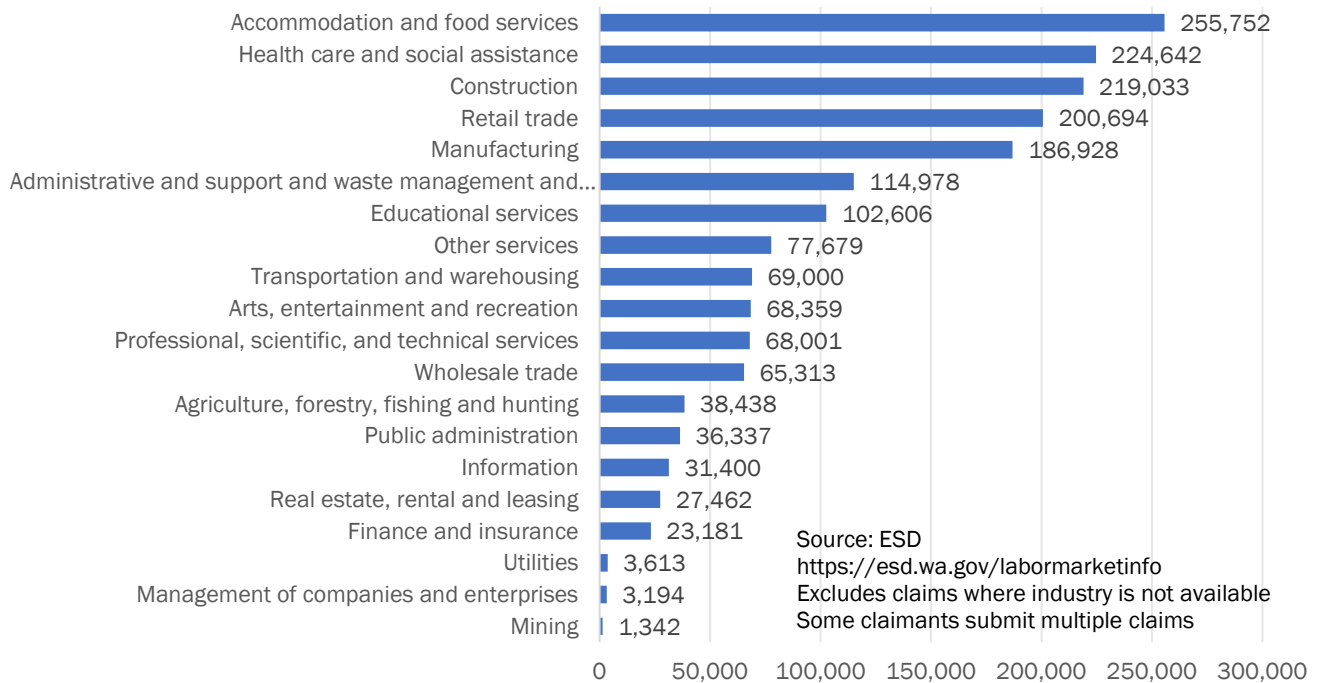
The highest number of claims came from the Accommodation and Food Services industry, with over 255 thousand claims between March 8, 2020 and April 24, 2021. Health Care and Social Assistance,

<sup>7</sup> The WA Employment Security Department has noted a number of initial unemployment claims appear to be fraudulent; however, it is unclear the exact impact of alleged fraudulent claims on the total number of claims at this time.



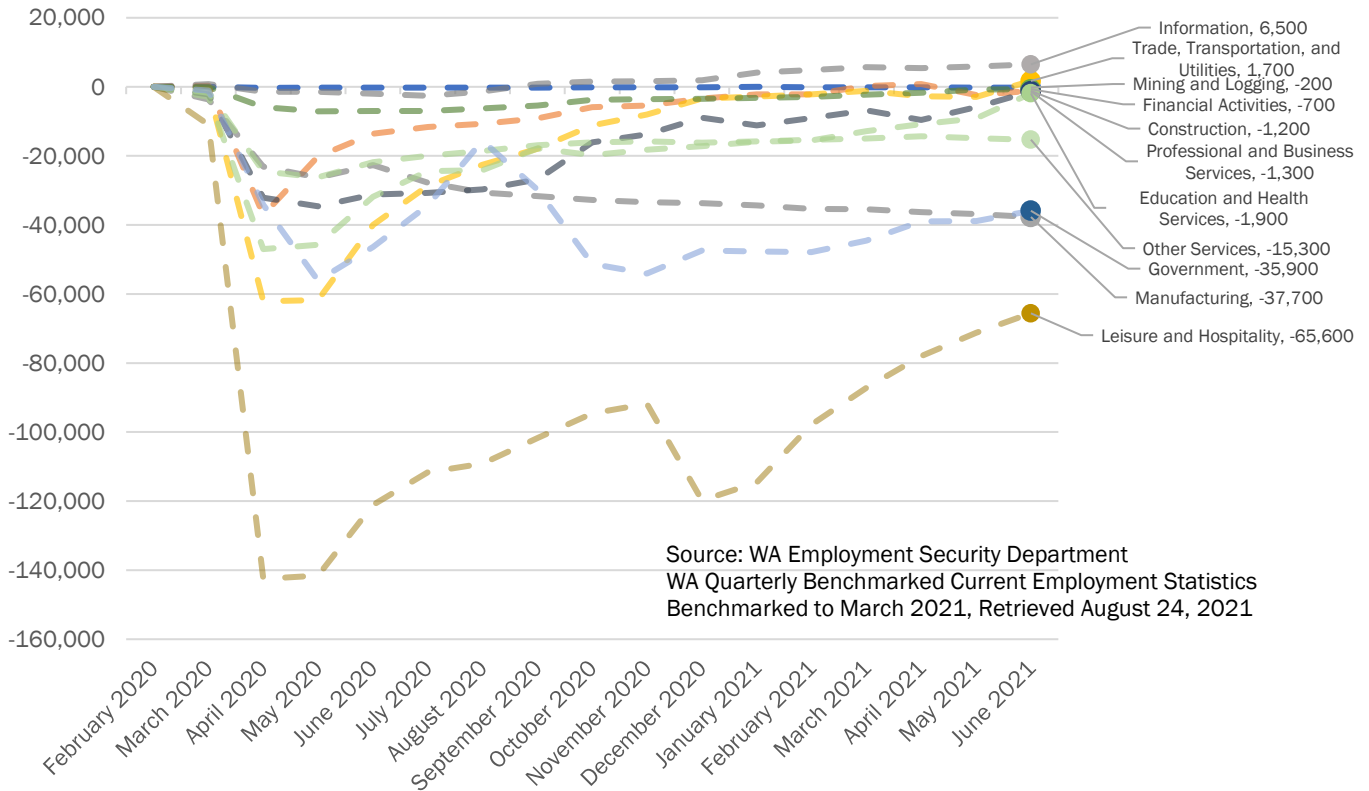
Construction, Retail Trade, and Manufacturing also had a noteworthy number of unemployment insurance claims, all above or near 200,000 claims.

Figure 12. Initial unemployment Claims by Industry, March 8, 2020 through April 24, 2021



Despite these sectors demonstrating a high number of initial unemployment insurance claims, overall employment levels show jobs in several high-claims sectors of the labor market rebounded over the past year. The substantial number of claims in Construction and Health Care and Social Assistance, for example, appear to have been temporary set-backs for these industries as the year wore on. Figure 13 shows the estimated number of jobs lost or gained by industry since February 2020. Note that industry classification differs slightly between these employment estimates and initial unemployment insurance claims data. Several key industries, particularly ones served by Professional/Technical programs like Construction and Education and Health Services, experienced a check mark-style rebound toward the beginning of the pandemic, with some industries actually adding jobs. Leisure and Hospitality, the worst-hit sector in Washington state, has seen some recovery in jobs since it's April 2020 low, but still remained well below pre-pandemic levels as of June 2021.

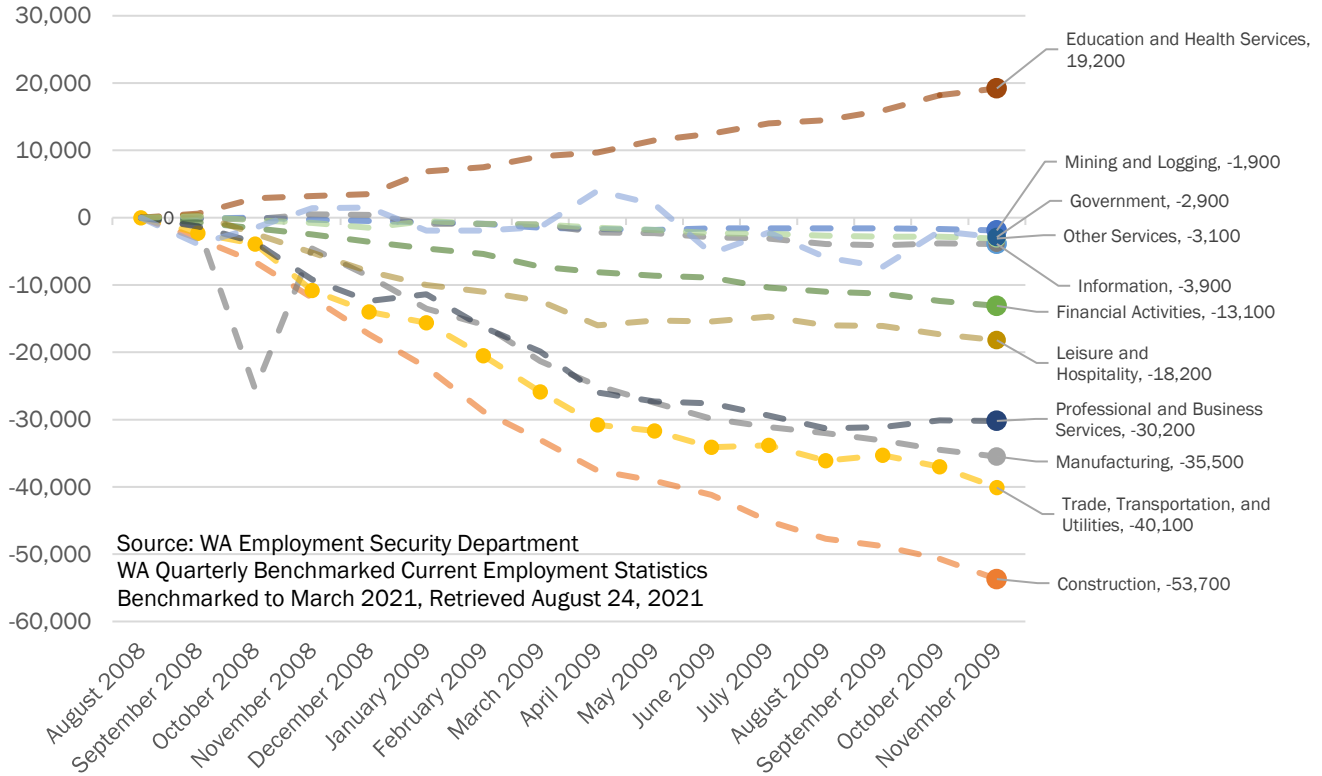
Figure 13. Pandemic Employment Conditions: Washington Estimated Job Gain/Loss Compared to February 2020



For context, Figure 14 illustrates seasonally adjusted employment gain or loss for a similar length of time during the Great Recession of 2008. The 2008 recession was followed by record higher education enrollment levels. Note only one industry, Education and Health Services, broke above its pre-recession employment level and remained there. Additionally, after 15 months, no other industry showed signs of a turnaround. Estimated job losses were more deeply felt between August 2008 and November 2009 among Construction; Trade Transportation, and Utilities; and Manufacturing. By comparison, during and after the COVID-related recession, Construction and Trade, Transportation and Utilities have demonstrated relative resilience, with only the Manufacturing sector suffering comparable job losses between the two recessions.

Overall nonfarm employment across the state is down from 3.51 million jobs in February 2020 to 3.37 million in June 2021, but the total number of nonfarm jobs has been increasing since bottoming out in May 2020. The unemployment rate, which is the ratio of estimated unemployed individuals compared to the estimated civilian labor force, has been steadily declining since hitting a high of 16.3 percent in April 2020 and currently sits at 5.1 percent, still above the pre-pandemic rate around 4 percent, but well below the high single digit rates seen in the aftermath the 2008 recession.

Figure 14. For Context, The Great Recession of 2008: Washington Estimated Job Gain/Loss Compared to August 2008, Seasonally Adjusted



A few additional employment factors that may play a role in an individual’s decision to enroll in a CTC are evidenced in national data. First, employers are experiencing upward pressure on compensation. According to the US Bureau of Labor Statistics (BLS), the 12-month change in wage and salary costs among private industry employers is up 3.5 percent in June 2021, higher than in recent years. Second, BLS data also show a record number of nonfarm job openings in June 2021 – 10.1 million compared with 7.2 million in January 2020.

### Employment and CTC Enrollment

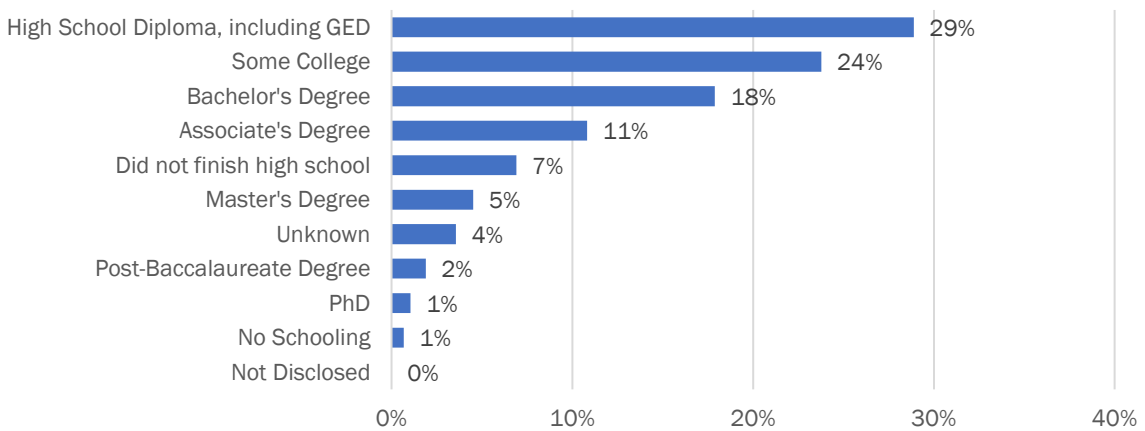
Analysis by the Pew Research Center earlier this year suggested two-thirds of unemployed adults have “seriously considered” changing their field of work. Those without a college degree were more likely to experience unemployment, and job losses were most severe among low wage occupations, often twice as steep when compared to middle-wage occupations, according to Pew.<sup>8</sup> Several employment-related factors likely weigh on a prospective student’s decision whether to enroll in a CTC, including a relatively high number of job opportunities and increased pressure on employers to pay higher wages. This mix of circumstances stands out from recessions of the past, where CTCs might have expected to see higher enrollments in the face of a challenging labor market. The muddled economic picture and uncertainty that lies ahead makes it

<sup>8</sup> <https://www.pewresearch.org/fact-tank/2021/02/10/unemployed-americans-are-feeling-the-emotional-strain-of-job-loss-most-have-considered-changing-occupations/>

challenging to chart a strategy toward enrollment recovery from the significant declines experienced in AY 2020-21.

Despite the uncertainty, one in four working-age Washingtonians sought unemployment assistance during the worst of the pandemic, and, if Pew’s national data translate to Washington, most of them have considered changing their field or occupation, and many would benefit from training for a new career offering higher wages. The majority of those seeking unemployment assistance in Washington over the course of the year had less than an Associate degree – one-third had not yet attended college (see Figure 15). With better job prospects than in prior recessions, CTCs will need to continue to highlight the value and benefits of their offerings, particularly as they relate to economic justice and opportunity, to encourage those most affected by the pandemic to enroll in a CTC in pursuit of a rewarding career.

Figure 15. Unduplicated Unemployment Claimant Breakout by Educational Attainment



WA ESD/LMEA Weekly Initial Unemployment Claimants by Education for period March 8, 2020 through April 24, 2021. Produced April 27, 2021.

## Summary

In AY 2020-21, CTCs experienced the worst year-over-year enrollment declines in recent memory due to the COVID-19 pandemic and mitigation measures put in place as a result of the virus. The disruptions caused by the pandemic highlight the need for colleges to continue to demonstrate how valuable a CTC education can be, particularly to those in industries that have not yet recovered and to those who would benefit from learning new skills or earning a credential in pursuit of a higher-paying job. Although the system has experienced higher enrollment from adverse employment conditions in the past, this last year has demonstrated this is not always the case. So far, enrollment remains a fluid issue as government officials consider the impacts of virus variants. Further analysis of this unique period in Washington CTCs’ long history will be necessary, but the short- to mid-term data highlighted in this report provide some perspective as colleges march toward another academic year clouded with uncertainty.



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