

Facing the 2025 Enrollment Cliff

FIVE STRATEGIES FOR SURVIVAL

HIGHER EDUCATION
+
BORSHOFF

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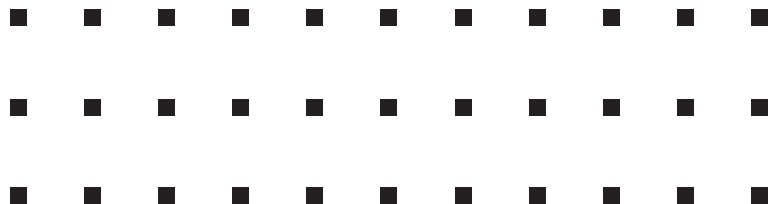
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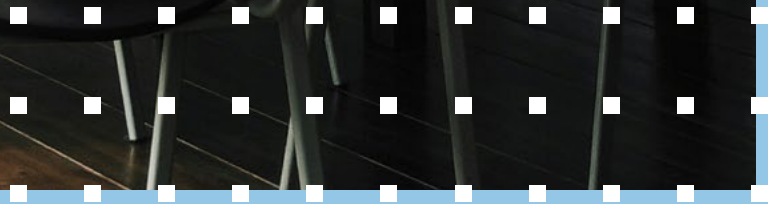
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13 YEARS OF DECLINING ENROLLMENTS



Higher education faces significant challenges: [declining enrollments](#) for 13 years, rising costs and a changing job landscape with some employers and states no longer requiring degrees. The industry’s political polarization and negative narratives have led to [historic lows](#) in public trust and confidence. Despite a brief pandemic-induced boost, graduate enrollments are now on the [decline](#), as are transfers from two-year to four-year institutions. The demand for higher education is down in a mature market significantly pushing back on rising costs. Adding to the complexity, less than one-third of graduates have relevant job or internship experience during college, and many [employers](#) find them unprepared for the workforce. As the demand for technological skills surges, 87% of executives anticipate or already face [a skills gap](#), relying on the next generation to bridge it. This decline is further exacerbated by the looming 2025 enrollment cliff, influenced by the [declining birthrate](#) during the Great Recession with recovery projected to take decades. Undergraduate enrollment is projected to decrease by 15% in eligible 18-year-olds starting in 2025 with notable geographic and racial shifts. The industry must adapt to regain public trust and meet job market demands as the enrollment cliff highlights the urgent need for innovative solutions.

CHANGING DEMOGRAPHIC PROJECTIONS:

Geographic Declines: Projections indicate student declines of:

75,000

in the Northeast

100,000

in the Midwest

100,000

in the South

125,000

in the West

*Texas and Florida are projected outliers with higher populations.

Racial and Ethnic Groups

Projected decline of

150,000

White traditional age students (18-24 years)

Projected decline of

50,000

Black traditional age students

Projected increase of

100,000

Latino student populations

Projected increase of

50,000

Asian student populations

First-Generation College Students:

This diverse [group](#), whose parents do not have four-year college degrees, makes up most of the college student population (56%). They enroll more frequently at lower-cost, less-selective four-year public institutions rather than higher-cost private colleges and universities.

Adult Learners:

The potential to attract adult learners as new college freshmen is immense with a total addressable market (TAM) of over 242 million candidates, including:

93 Million

adults aged 25+ with a degree

39 Million

adults with some college but no degree

70 Million

adults with a high school degree or GED

40 Million

adults with no high school degree or GED

This pool of potential adult learners significantly surpasses the traditional student market, which has only 19.3 million potential students for undergraduate and graduate programs combined.

INSTITUTIONAL LANDSCAPE:

- **Elite Ivy Schools:** These institutions cater to the wealthy and to families where higher education is less questioned, mostly avoiding the problem.
- **Highly Selective Private Institutions:** Despite concerns about the privilege gap, these well-resourced and prestigious schools are likely to see increased enrollments.
- **HBCUs, Trade Schools, STEM Schools and Community Colleges** serving dual-enrolled high school students: These institutions stand apart from the criticisms of higher education and are likely to see increased enrollments due to their focus on access, workforce readiness and low costs. HBCUs excel in providing a quality experience with Black students being twice as likely to have internships compared to the national average (Gallup).
- **Online Schools:** Institutions like Purdue Global, Southern New Hampshire University and ASU Online are expected to see increased enrollments. Supported by substantial media budgets, they cater to working adults and the 40 million Americans with some college credits but no degree, offering a flexible and accessible path to complete their education.
- **Less Selective Public Institutions:** These institutions will face the brunt of the impact and are expected to experience significant challenges. Rural colleges and universities are projected to suffer the steepest enrollment declines.



ICEBERG, STRAIGHT AHEAD

In a sector historically resistant to change and now facing heightened competition and declining demand, many institutions find themselves at a crossroads, unsure of where to begin. Many swim [“in the sea of sameness”](#) – heavily relying on recruitment marketing to survive due to weaker branding and geographical uncertainties for core demographics. Financial struggles, shifting student demographics, declining enrollments and reduced funding have led to increased closures, mergers and acquisitions as reported by [Higher Ed Dive](#). On average, one university or college [per week](#) has announced closure or merger in 2024, up from slightly more than two per month last year, according to the State Higher Education Executive Officers Association (SHEEO). Only the most market-savvy institutions are expected to survive the enrollment cliff. For-profits continue to outspend public institutions on advertising, targeting students from smaller, less-resourced institutions. Pre-pandemic, [for-profits spent about \\$400 per student on advertising](#) compared to just \$14 by public institutions.



KEYS TO SURVIVING THE ENROLLMENT CLIFF



Much like the digital revolution transformed retail and technology in the 2010s, less selective institutions must adapt to shifting demographics and evolving student preferences to succeed beyond 2025. **Agencies like Borshoff specialize in guiding institutions through these critical transformations by focusing on two key areas:**

1. **Adopting a Student-Centric Business Model:** Institutions need to shift from traditional models to cater to diverse learners and changing demographics.
2. **Enhancing the Student Experience:** Modern students, especially Gen Z, prioritize experience, employability, scholarships and personalized services. They expect a seamless digital experience similar to what they encounter in the commercial space.

Some universities that have adapted their business models are already seeing significant returns on their investment.

NOTABLE EXAMPLES INCLUDE:

- **Arizona State University:** Tops innovation rankings [by continually rethinking](#) business functions and leveraging technology for a student-centered experience.
- **Texas Christian University (TCU):** Known for its exceptional [student experience](#) with rising enrollments, high retention rates and top rankings for happiest students.
- **Kansas State University:** [First-year experience program](#) has led to high retention rates and positive employment outcomes, earning one of the happiest student rankings in the nation.
- **Wrexham Glyndŵr University (UK):** Holds top ratings for social inclusion, teaching quality and student satisfaction with a 95% employability rate and plans to target [American](#) students.
- **American University:** [First-Year Experience](#) is voted among the country's best, joining prestigious universities like Yale and Boston College.

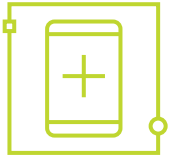




5 STRATEGIES FOR SUCCESS



To succeed in this new landscape, prioritizing strategic initiatives and data-driven decisions is essential to effectively navigating the path ahead. Here are five key strategies:



1. PERSONALIZE DIGITAL PRESENCE

Optimize websites and social media platforms to meet Gen Z's needs, emphasizing desired majors, affordability, career opportunities and campus culture.

- **Website Optimization:** According to 2022 Ologie research, 37% of Gen Z students start on search engines, and an equal 37% begin directly on the university's website. This data highlights the importance of search engine optimization (SEO) and the need to prioritize the most important and relevant content on your site. Gen Z's top areas of focus include desired majors, affordability/financial assistance options, career opportunities and classes. Virtual campus tours, campus events and top reasons why they should choose your institution are also important. Top website examples include: [Bucknell](#), [Wheaton College](#) and [IU Indianapolis](#).
- **Social Media Engagement:** 16% of Gen Z students use social media in their college search, seeking an authentic and unfiltered sense of campus culture. To appeal to them, use top Gen Z social [platforms](#) like Instagram, YouTube and TikTok to highlight campus events, student life, intimate class sizes, student interactions with faculty, and the appeal of your campus location and off-campus life in the surrounding area. Engaging IG reels and TikTok videos that offer captivating campus tours and a glimpse into vibrant campus life can help students evaluate the college's elusive "fit."
- **TikTok Presence:** Despite potential bans, universities [must be present on TikTok](#). Use student ambassadors to reinforce brand values and connect with the audience. Student interns, like those at Montevallo and Wash U, are instrumental in creating content, leveraging insights into TikTok trends and audience preferences. Gen Z uses TikTok as a [search engine](#), and prospective students rely on TikTok during the college search for authentic student experiences with billions of views ([#collegelife](#) and [#university](#)).



2. ENSURE SUCCESSFUL CAREER STARTS

Provide robust career support to ensure graduates achieve successful career outcomes, delivering the ultimate return on investment. Collaborate with industry partners to enhance career pathways, internships, apprenticeships and other work-based learning experiences, following models like Quinnipiac University and Marquette University.

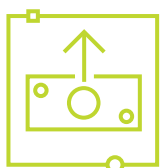
- Quinnipiac University offers a [holistic approach](#) to career development, boosting a 99.7% job placement rate in 2021.
- Marquette University is ranked nationally for [job placement](#), offering a [youth career development program](#), [Student Success Initiative](#) and a career service center with a [career management](#) platform.



3. SUPPORT FIRST-GEN STUDENTS

Offer personalized [First-Gen student support](#) programs like the University at Buffalo's [Proud to Be First](#) and UNC Charlotte's [First Gen Niners](#). Provide parent-specific outreach to meet their unique needs.





4. ELEVATE FINANCIAL AID PACKAGES

Address Gen Z's affordability concerns about competitive aid packages, as seen at Truman State University, Hunter College and Siena College.

- Truman State University in Missouri [stands out as a school](#) with total out-of-state expenses under \$25,000 per year. 99% of incoming students receive financial aid, and at least 50% graduate without debt due to merit-based and specific scholarships.
- Hunter College in New York awarded 78% of students with need-based aid in 2021 and covered 82% of demonstrated need through various aid programs. They offer a program called [SEEK](#), supporting academically and financially disadvantaged students.
- Siena College in New York offers the [Siena Guarantee](#) which guarantees a \$57,000 scholarship.



5. OFFER FLEXIBLE LEARNING

Allow students to customize their learning experiences to better fit their personal needs, schedules and learning styles. This approach caters to the diverse backgrounds and commitments of modern students, including working professionals, adult learners and traditional students. Respond to the demand for shorter, flexible programs similar to [Southern New Hampshire University](#) and [Miami of Ohio's](#) microcredential offerings in high-demand fields.

These strategies are pivotal in not only attracting but also retaining students in an increasingly challenging higher education landscape.





THE BORSHOFF ADVANTAGE



At Borshoff, we are your trusted partner specializing in comprehensive, omnichannel marketing solutions. Our expertise spans SEO, targeted advertising and earned media, tailored specifically to leverage your student data, competitive edge and market position. Unlike singular approaches, our holistic strategy enhances both awareness and recruitment marketing.

Our team of higher education experts provides seamless collaboration across your internal teams and vendor partners, ensuring successful execution throughout the entire student journey.

With a deep commitment to education, we have proudly partnered with numerous institutions over four decades, positively impacting millions of students.

ALONGSIDE OUR FULL-SERVICE MARKETING OFFERINGS, OUR SPECIALIZED HIGHER EDUCATION SERVICES INCLUDE:



Research and Data: Delve into student data and insights from lists, surveys or interviews to guide strategic marketing recommendations.



Multi-Channel Strategic Marketing Plans: Align strategies with demographic shifts and student preferences, ensuring alignment across leadership, communications, marketing, admissions and IT teams.



Lead and Application Nurturing: Enhance the student journey from initial contact to enrollment.



Social Media Engagement (YouTube, Instagram, TikTok): Use organic strategies and paid ads to maximize visibility and influence.



Comprehensive Consultative Services: Foster collaboration across internal teams to support cross-functional integration strategies, improving the overall student experience at your institution.

Higher education stands at a pivotal moment, and at Borshoff, we are dedicated to equipping institutions with the tools and strategies needed to thrive.



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