



# 2025 Landscape of Higher Education

## Higher Education in the Era of the Modern Learner





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# Introduction

A confluence of economic shifts, changing student priorities and technological evolution have pushed higher education into a new era—the Era of the Modern Learner. In this new era, prospective students have the power to choose their education pathway, with age no longer predicting learning modality and outcomes. This report aims to illuminate the key trends reshaping higher education in the Era of the Modern Learner, highlighting the imperative for institutions to adapt to labor market demands and deliver student-centric outcomes.

A significant development is the increasing focus on career-oriented programs that deliver practical skills. Students are now prioritizing options that offer direct links to employment and a return in value on investment. There has been a surge of interest in credentials of all kinds, including certificates and apprenticeships as well as undergraduate and graduate degrees.

Enrollment statistics in degree-granting programs underscore the demand for skill-focused outcomes: undergraduate enrollment has increased by 2.5%, particularly within community colleges and public institutions, while graduate programs have seen a 3% rise. Credentials, certificate programs, apprenticeships and other alternative pathways have also experienced significant enrollment growth. Dual enrollment programs for high school students are also empowering a proactive approach to education. At the same time, younger students are increasingly choosing online, remote and hybrid programs, often while working and balancing multiple priorities. Still others are turning to apprenticeships as alternative pathways to their desired career outcomes. These trends all point to a broader cultural shift toward accessible and flexible education, where students seek options that fit their diverse aspirations and circumstances with cost-effective solutions delivering valuable outcomes.

Colleges and universities have an opportunity to meet the challenges presented in this new era with a thoughtful student-centered approach to education and diverse pathways that lead to valuable career-focused outcomes.

# Economic Landscape

To understand the higher education landscape in 2024-2025, we first look to changes in the labor market. A slight rise in unemployment rates through the first half of 2024 signified an end to labor market growth and a turn toward stability. In addition, job openings have declined. While there was fear of a recession through much of 2024, it now appears that the economy has entered a period of stability, particularly with respect to employment trends.

The overall demand for higher education is likely to remain fairly level. The Labor Force Participation Rate has remained stable due to an aging population and the significant number of workers leaving the workforce permanently. An influx of new job seekers have emerged to fill much of the gap, but they require the skills and job training necessary to replace the more experienced workers who have left the labor force. This suggests that the overall demand for higher education might not see dramatic shifts either way over the next few years.

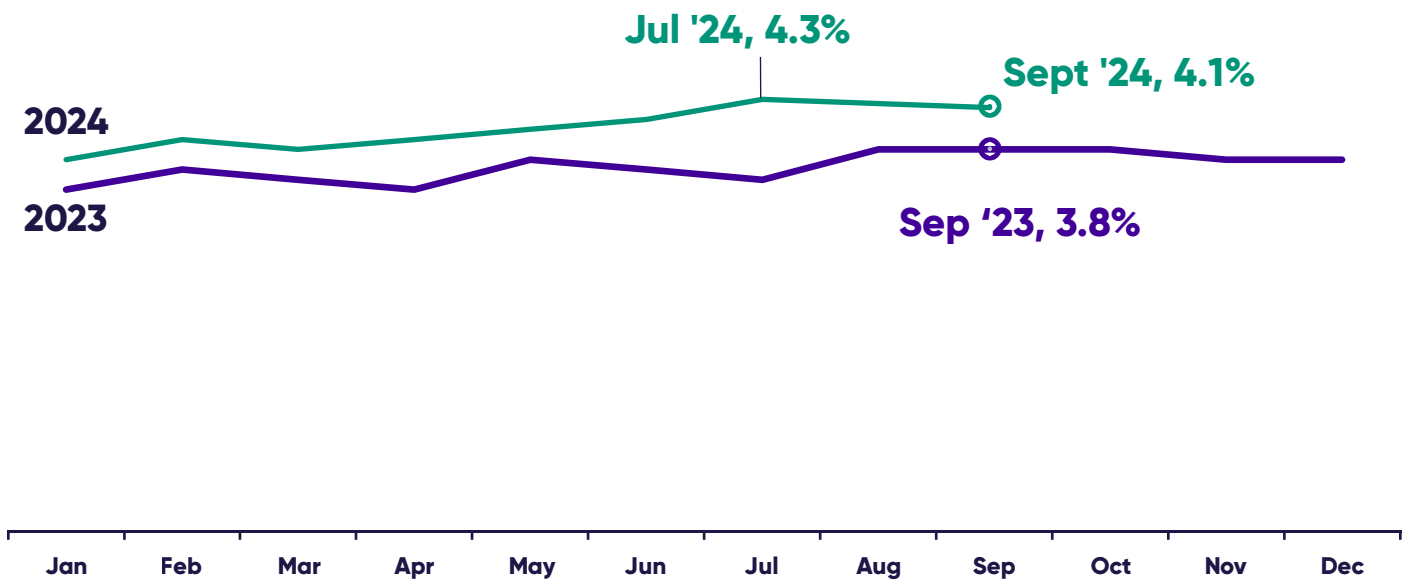
However, students and educational institutions alike will need to navigate a landscape where scrutiny of the return on investment in education may affect enrollment decisions. Understanding these impacts is crucial for both prospective students and educational institutions as they adapt to the evolving labor market.



## Total Unemployment Rate

Although the overall unemployment rate remains relatively low, unemployment crept up modestly in 2024, continuing the trend from 2023. Unemployment rates peaked at 4.3% in July 2024, marking the first time the rate exceeded 4% since the beginning of 2022. Since peaking in July 2024, unemployment decreased to 4.2% in August and 4.1% in September 2024. This data, coupled with job market data, indicates a transition from a growing job market to a stable market.

### Unemployment Rate January 2023-September 2024



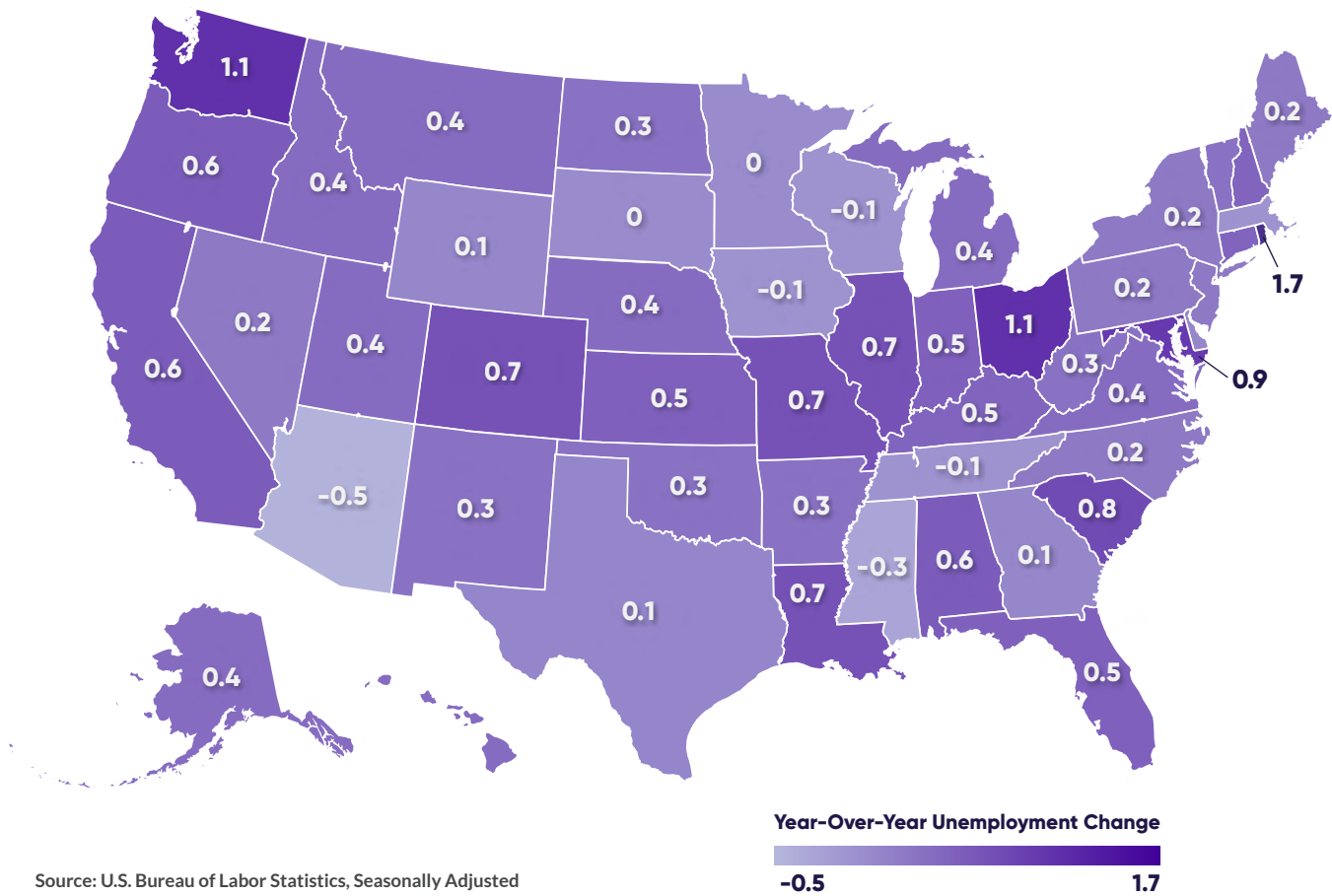
Source: U.S. Bureau of Labor Statistics, Seasonally Adjusted Unemployment Rate



# Unemployment by State

The states experiencing the most significant year-over-year increases in unemployment were Rhode Island, Ohio and Washington.

## State Employment Changes from June 2023 to June 2024



Source: U.S. Bureau of Labor Statistics, Seasonally Adjusted

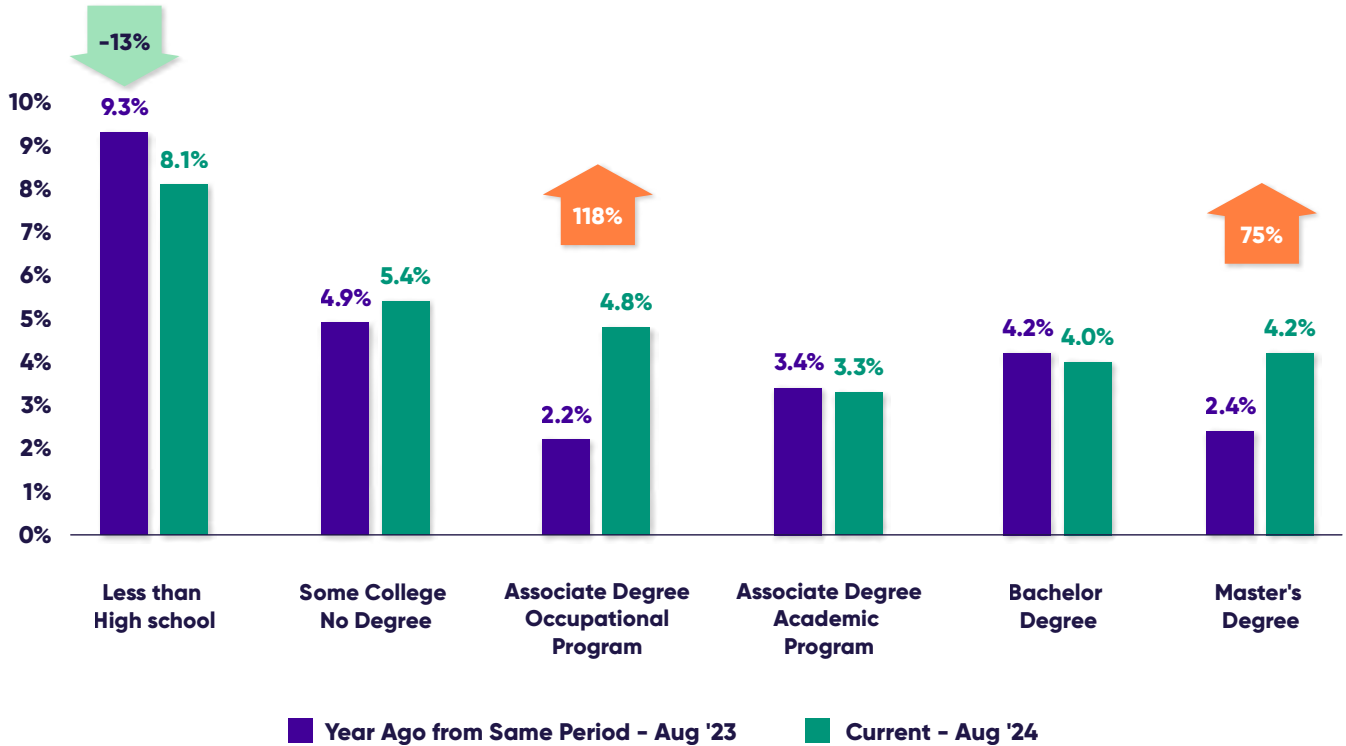


# Unemployment Rate by Education

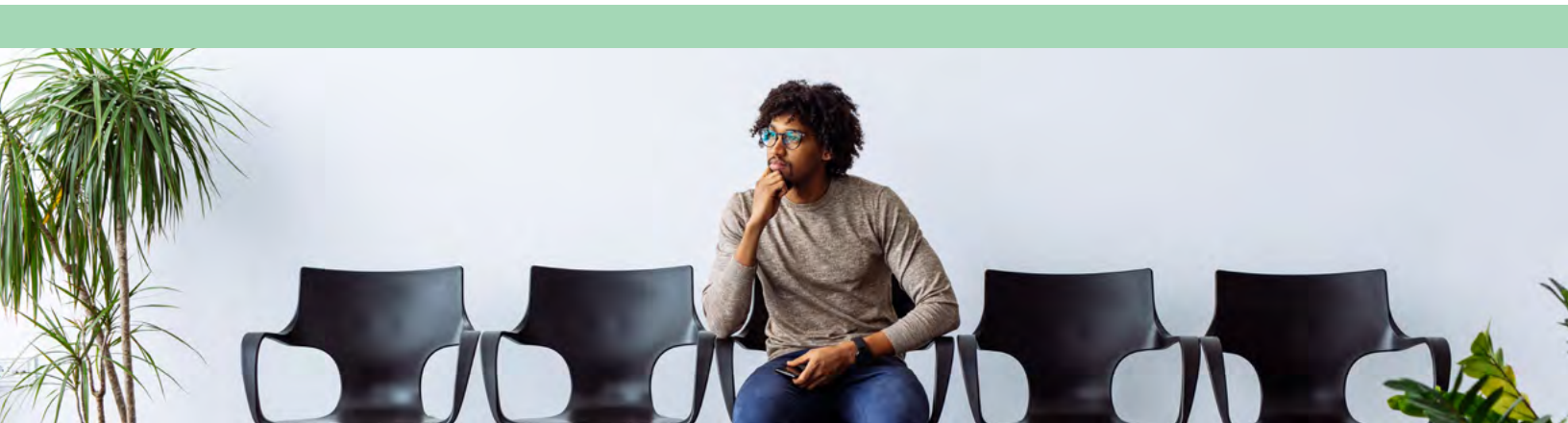
An examination of the 2024 unemployment rate by level of education reveals some surprising results. Unemployment among those holding a master's degree experienced a 75% increase in unemployment over the past year. Conversely, those with less than a high school degree saw a 21% decrease in unemployment compared to the previous year. Unsurprisingly, those with any type of college degree experienced a lower unemployment rate than those without a degree.

## Unemployment Rate by Educational Attainment and Age, Monthly

25 to 34 year olds August 2024 v. August 2023



Source: U.S. Bureau of Labor Statistics, Not Seasonally Adjusted 25-34 years old, Unemployment Rate

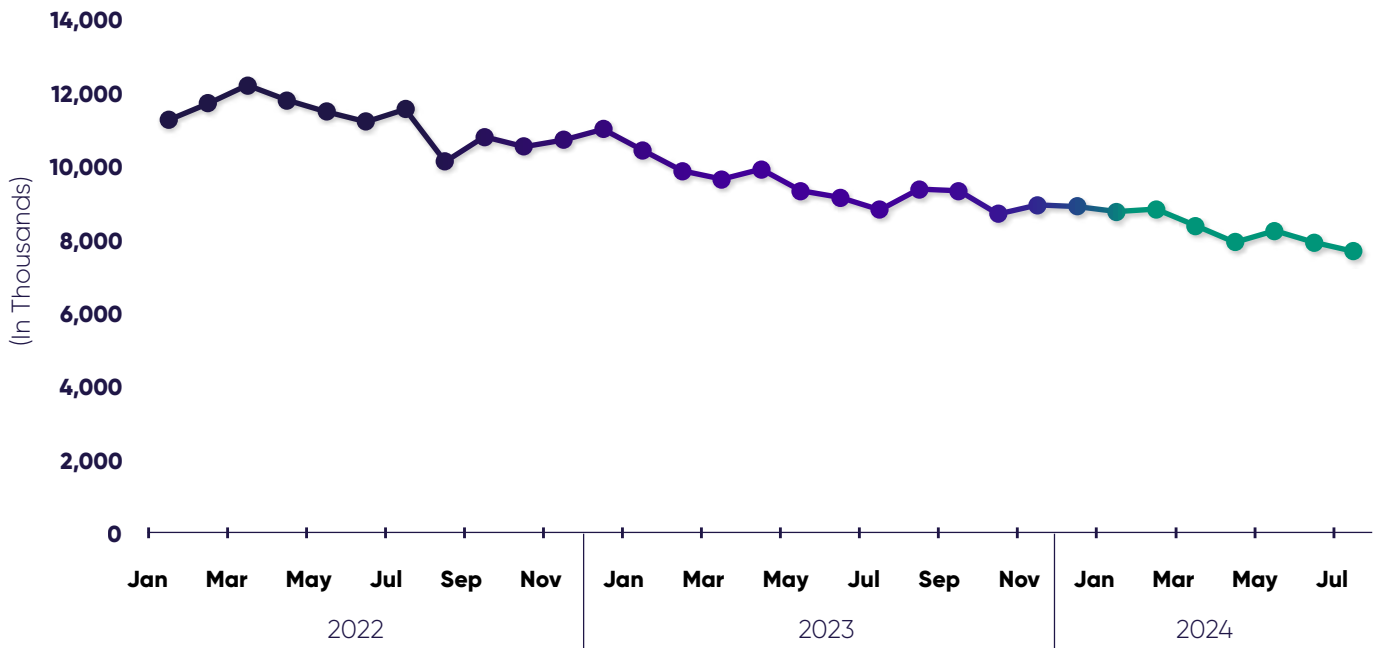




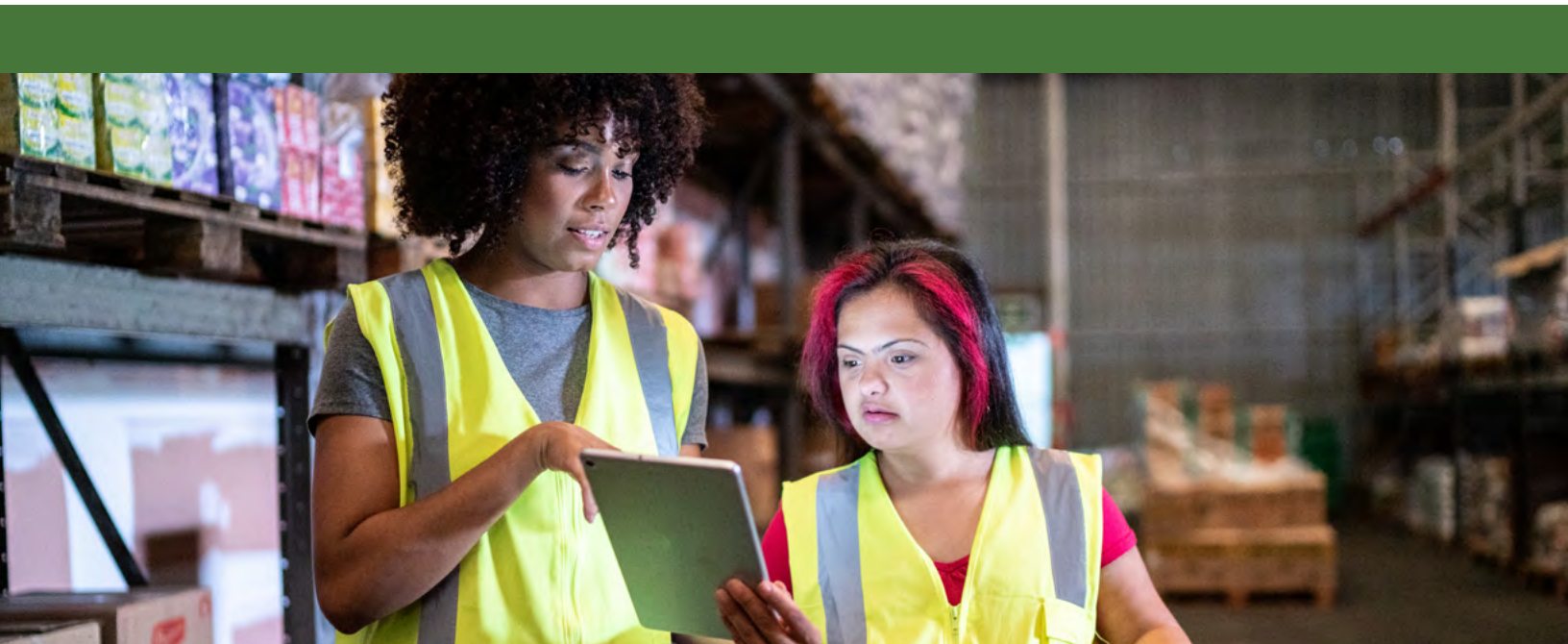
# Job Openings

Declining job openings can explain some of the uptick in unemployment rates nationally. From July 2023 to July 2024, overall job openings declined by nearly 13%.

## Job Openings 2022-2024



Source: U.S. Bureau of Labor Statistics, Seasonally Adjusted Unemployment Rate



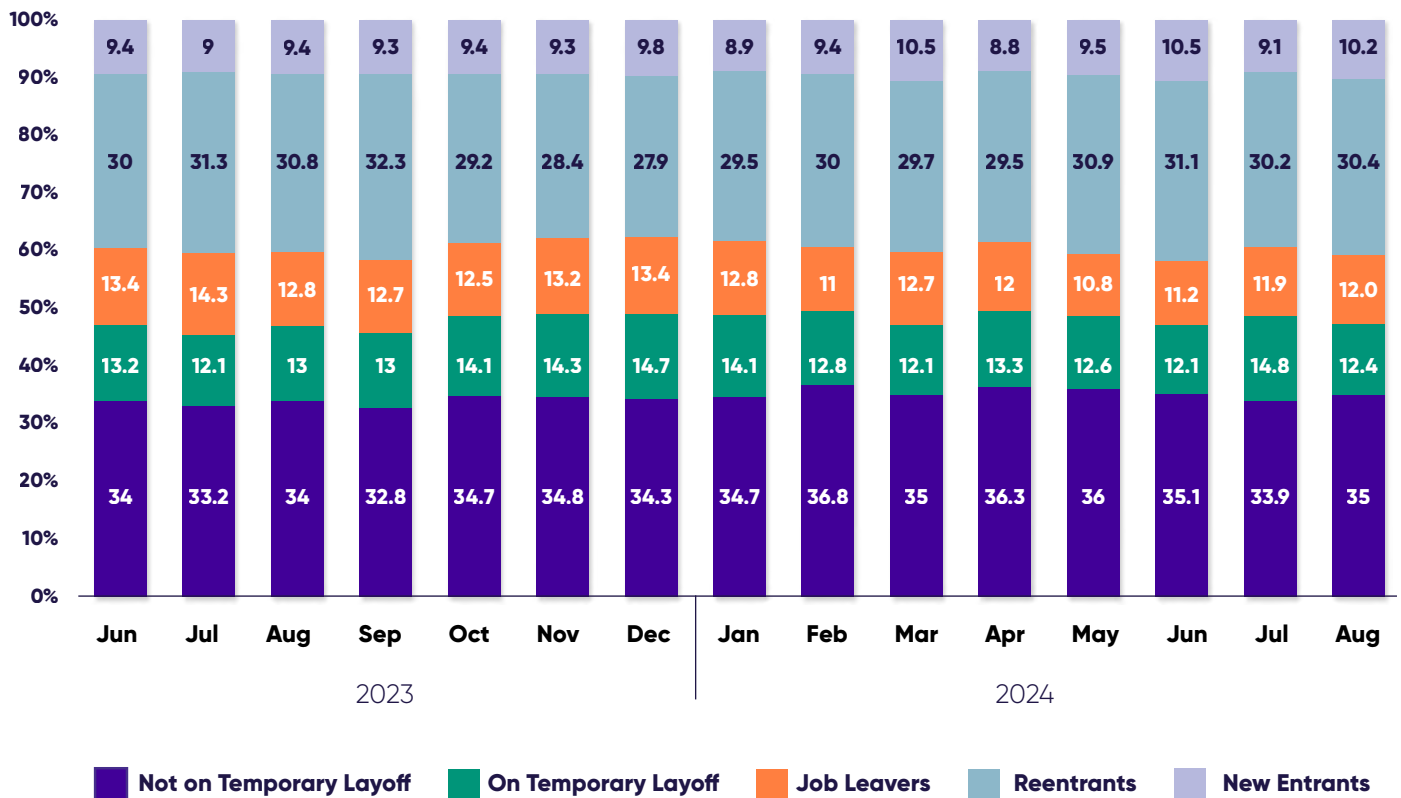




## Reasons for Unemployment

As hiring rates and job openings have declined, the percentage of employees voluntarily leaving their jobs has also decreased—dropping from 12.8% in August 2023 to 12% in August 2024. The proportion of unemployment due to new entrants seeking employment has increased to more than 10%, compared to about 9% in August 2023.

### Unemployed Persons by Reason for Unemployment



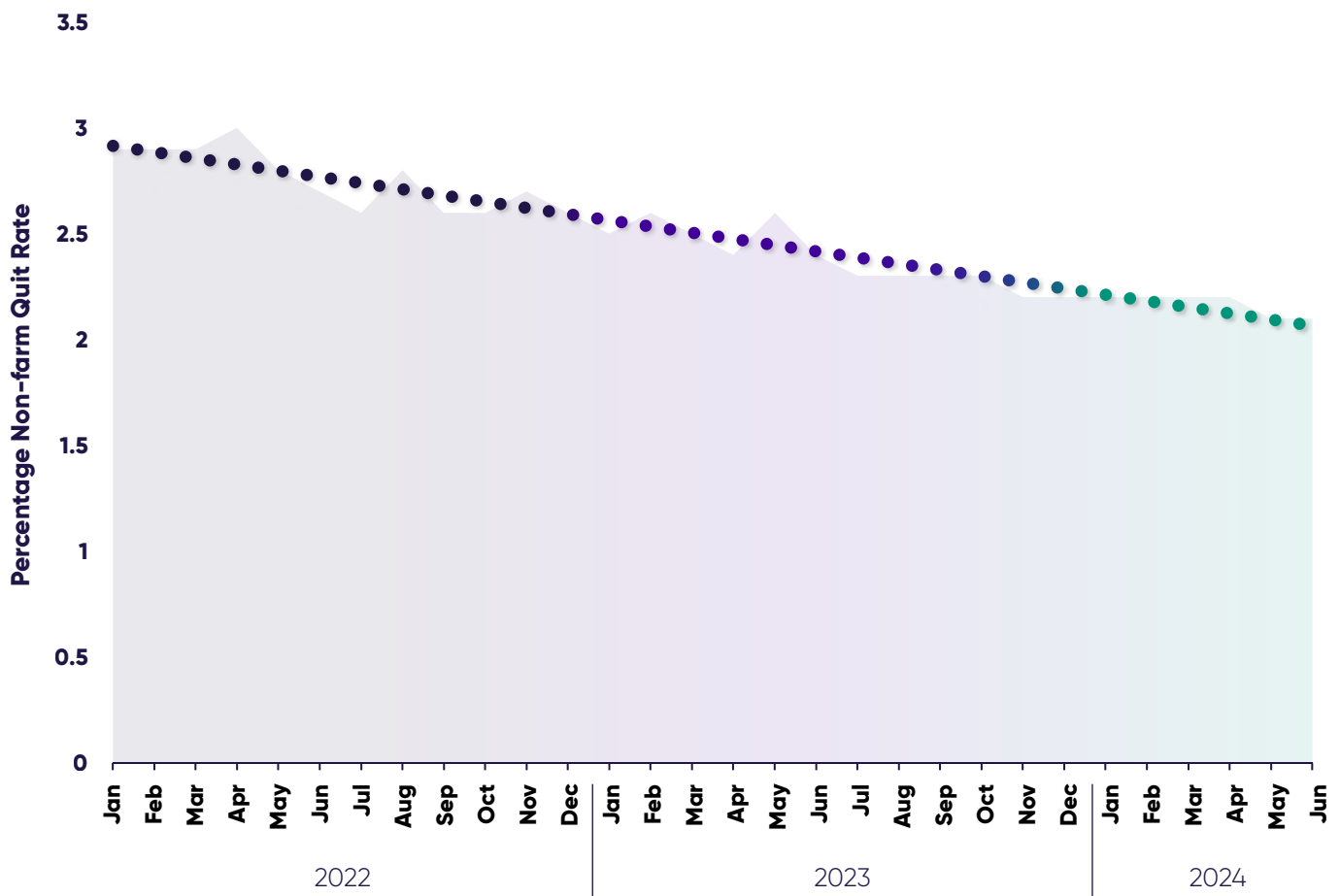
Source: U.S. Bureau of Labor Statistics, Seasonally Adjusted



## Quit Rates on the Decline

We have continued to see quit rates decline over the last two years. Lower quit rates can indicate economic uncertainty, during which employees may hesitate to leave their jobs due to fears of instability or a lack of alternative opportunities.

### Quit Rates: Total Non-Farm



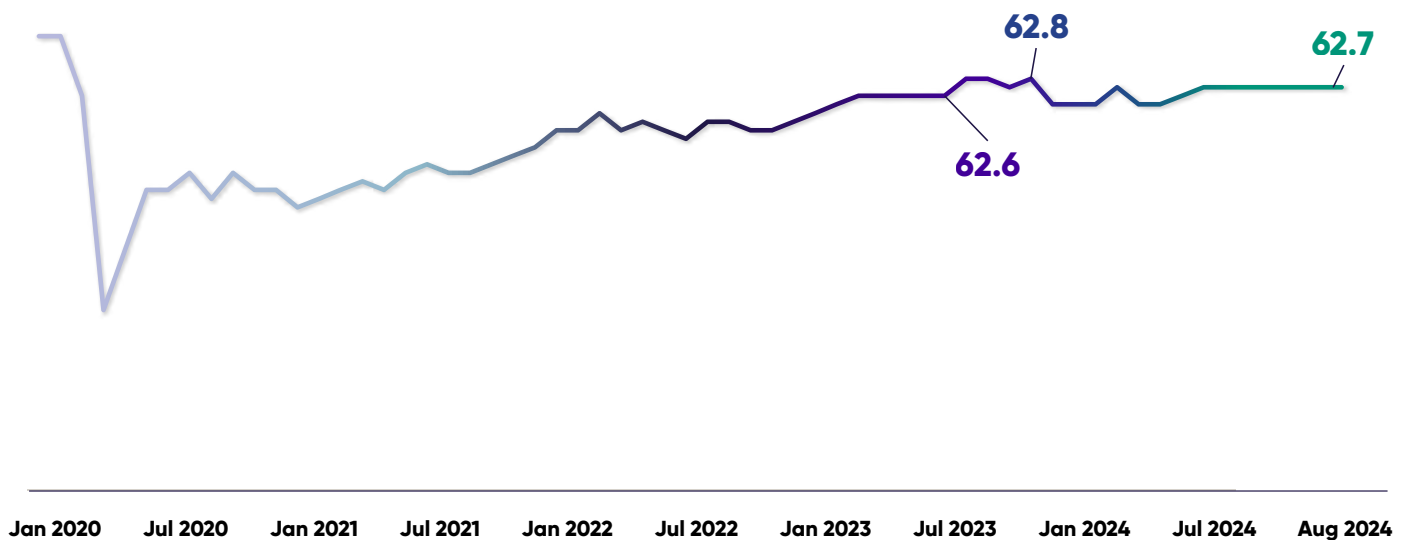
Source: U.S. Bureau of Labor Statistics



# Labor Force Participation Rate

In 2024, the Labor Force Participation Rate stabilized after several years of growth. Despite an influx of new entrants into the workforce, the rate has not yet returned to the pre-pandemic level of greater than 63%. This can be partially attributed to the fact that a large segment of the population is aging out of the workforce. The Labor Force Participation Rate will likely remain stable or decline slightly over the next several years as more of the population ages out of the workforce.

### Labor Force Participation Rate, Percent, Monthly



Source: U.S. Bureau of Labor Statistics, January 2020 - August 2024, Seasonally Adjusted



# Enrollments

Spring 2024 enrollment numbers were largely positive across undergraduate and graduate programs. Undergraduate enrollment rose by 2.5%, with community colleges seeing the most significant increase, signaling renewed opportunities and a positive shift from pandemic-related declines. Graduate programs also experienced a 3% increase, reflecting a rebound in advanced education.

High school dual enrollment programs are also contributing to enrollment growth, particularly at community colleges and public institutions. High school students are increasingly interested in dual enrollment programs, which have expanded significantly over the past three years. This trend highlights the increasing availability of advanced educational options for high school students and emphasizes the growing demand for flexible learning pathways. Overall, these developments suggest a dynamic and increasingly favorable landscape as more students seek out learning pathways.

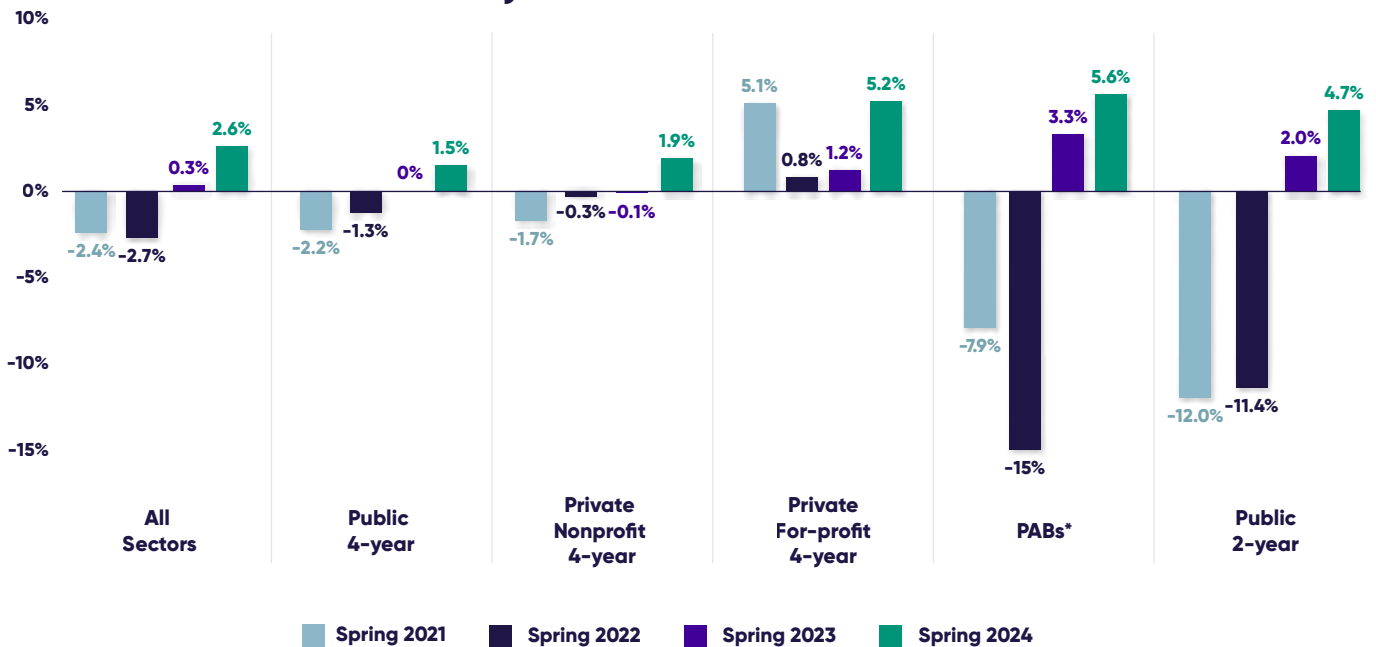




# Spring 2024 Enrollments

Enrollment continued to grow in Spring 2024, most notably among primarily associate degree-granting baccalaureate institutions (PABs) and private for-profit 4-year institutions. Graduate enrollment grew at the greatest rate among private, for-profit 4-year institutions. Undergraduate growth was most pronounced among Public PABs, community colleges (Public 2-year) and private 4-year institutions.

### Percent Change in Enrollment from Previous Year by Institutional Sector: 2020 to 2024



\* PABs – Primarily Associate Degree Granting Baccalaureate  
Source: National Student Clearinghouse Research Center  
<https://nscresearchcenter.org/current-term-enrollment-estimates/>

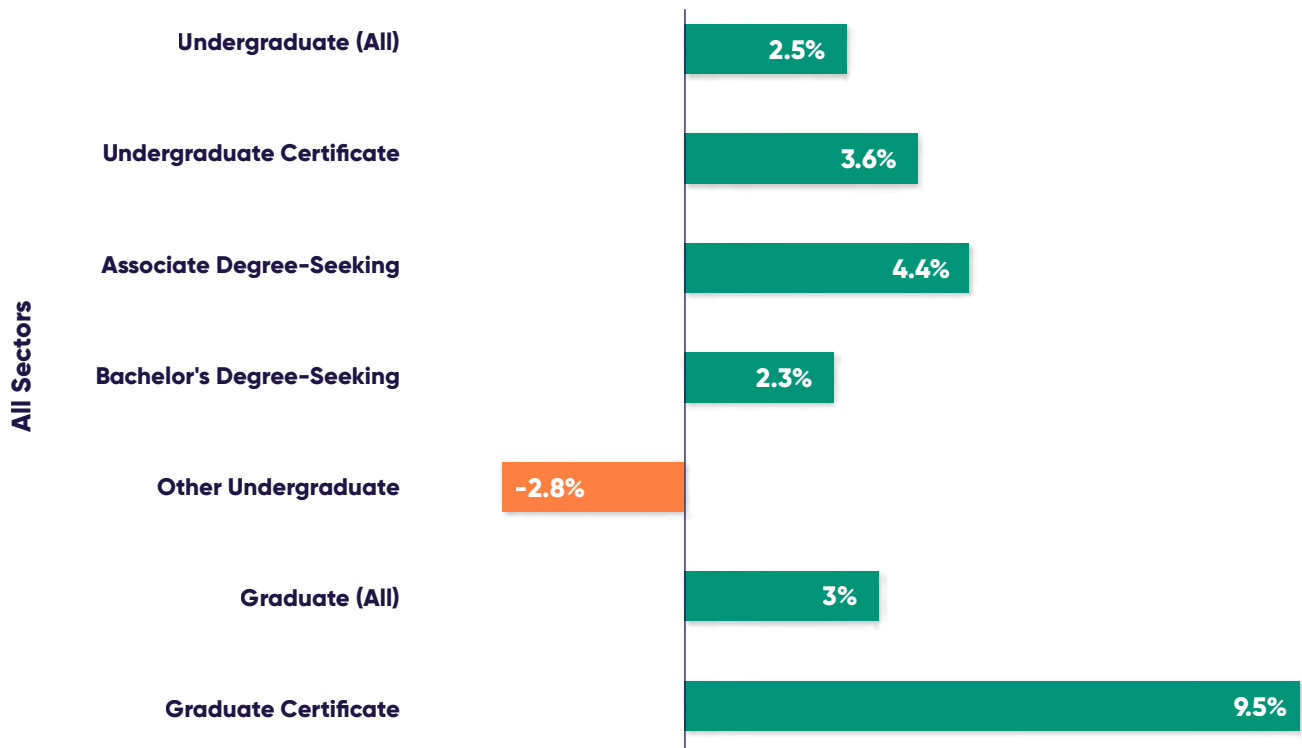




## By Degree Level Spring Shifts

While previous years brought an increase in enrollments for Other Undergraduate programs, that trend reversed in 2024. Most segments experienced growth while Other Undergraduate programs declined. The most significant rise in spring enrollments was observed in Graduate Certificate programs, with an increase of nearly 10%.

### Estimated National Enrollment Percent Change by Institutional Sector and Program Level: 2023 to 2024



Source: National Student Clearinghouse Research Center

*In this report, the "Other Graduate" category includes post-baccalaureate certificates as well as a small number of non-credential enrollments (about 2% of non-credential enrollments in each year) reported as graduate level by institutions. The "Other Undergraduate" category includes the remaining non-credential enrollments as well as enrollments that are missing credential level information and are assumed to be non-credential.*

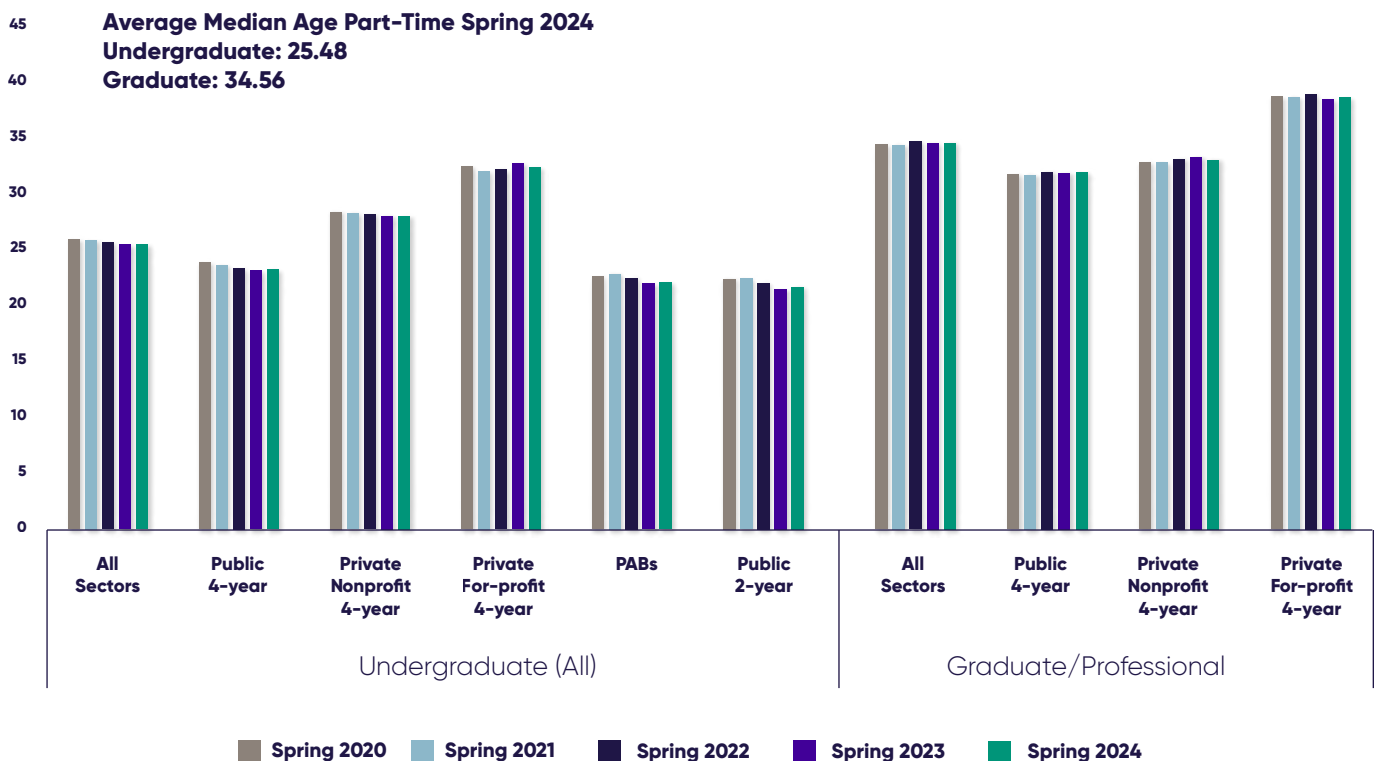


# Median Ages, Part-Time Students

Since Spring 2020, the median age of part-time undergraduate students has decreased by nearly 2% across all sectors. The most significant declines at the undergraduate level were in public two-year institutions, which saw a 4.2% drop, followed by private accredited bachelor’s programs with a 2.8% decline in the median age of students, reinforcing that age no longer predicts learning modality.

Over the same period, the median age of part-time graduate students has risen 0.4%, from 34.4 years to 34.6 years. Private nonprofit four-year institutions saw the greatest increase in median age of part-time graduate students, rising from 32.8 years to 33.3 years.

## The Median Age of Part-Time Students by Program Level, Institutional Sector and Enrollment Intensity: 2020 to 2024



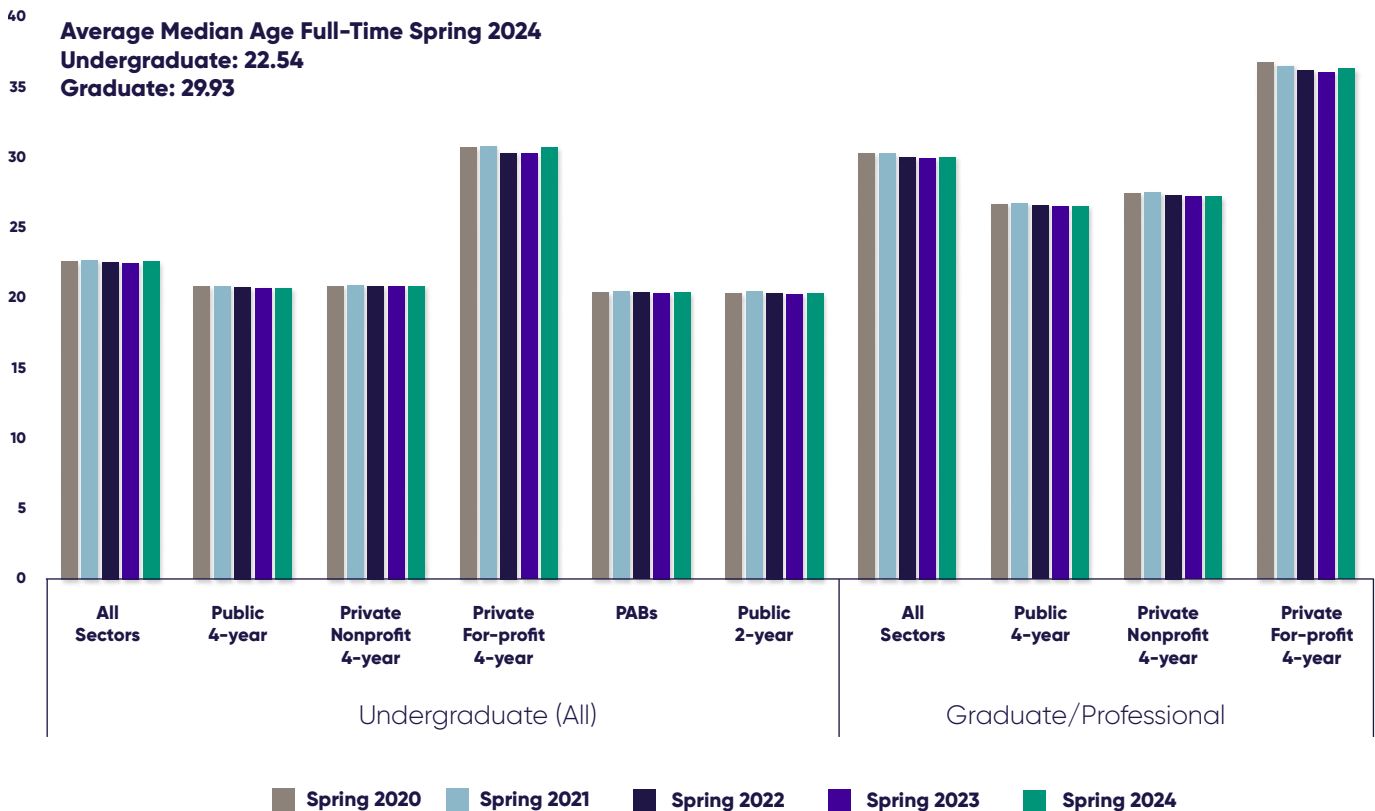
Source: National Student Clearinghouse Research Center



# Median Ages, Full-Time Students

The median age of full-time students has remained relatively stable across both undergraduate and graduate sectors. Within these sectors, the greatest change occurred in private for-profit institutions. There, the median age of undergraduate students increased by 1.5% from 2023 to 2024. Conversely, the median age of graduate students at for-profit institutions has decreased by approximately 1% over the past five years.

## The Median Age of Full-Time Students by Program Level, Institutional Sector and Enrollment Intensity: 2020 to 2024



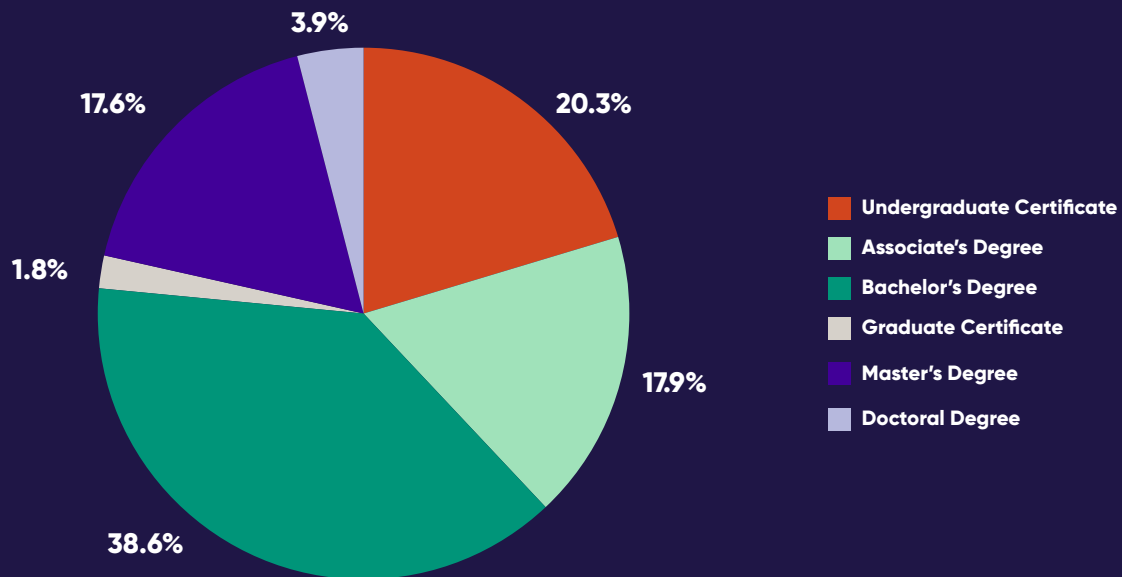
Source: National Student Clearinghouse Research Center



# Certificate Progression

Rising tuition rates have made graduate and undergraduate certificates increasingly attractive for students seeking to advance their education swiftly and efficiently. IPEDS Completions Data from 2019 to 2023 reveals the evolution of these alternatives to traditional degrees. Graduate certificates have grown in popularity with variations across states and institutions. By examining this trend, we can identify which states have the highest demand for these certificates and where universities are effectively capitalizing on the growing interest.

### Completions by Award Level - 2023



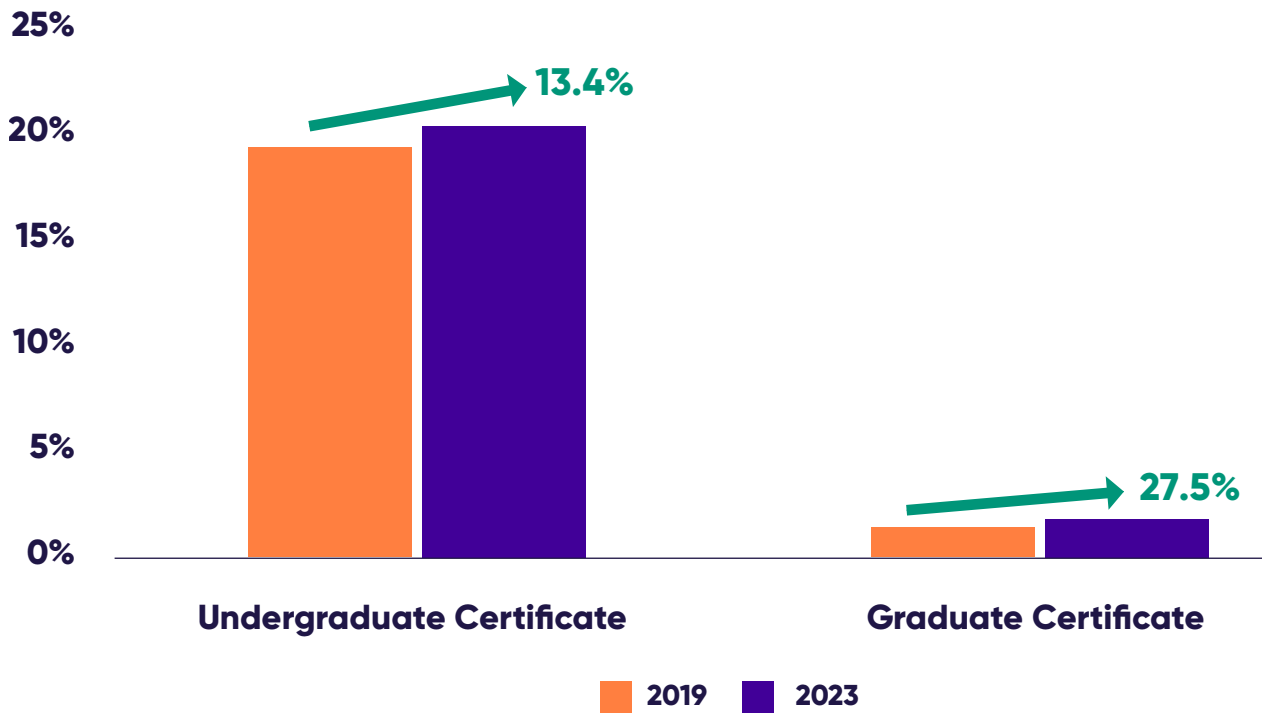
Source: NCES IPEDS Completions Data 2023



## Award Level Distribution

Between 2019 and 2023, the proportion of undergraduate certificates increased from 19.3% to 20.3%. Over the same period, graduate certificates rose from 1.4% to 1.8%.

### Change in Certificate Awards by Level: 2019-2023



Source: NCES IPEDS Completions Data 2023



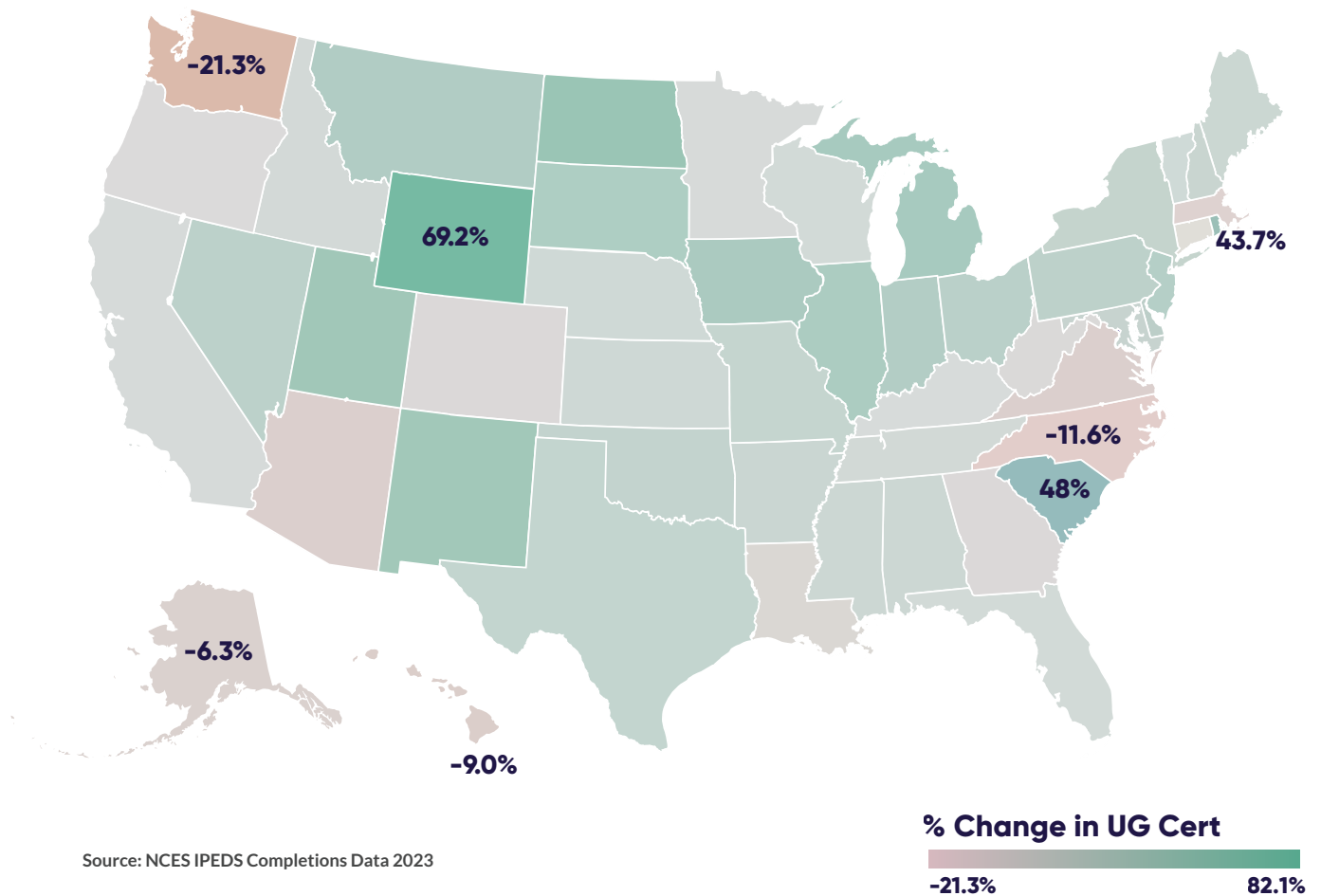


## Undergraduate Certificate Growth by State

Since 2019, the number of undergraduate certificates awarded has increased the most in Wyoming, South Carolina and Rhode Island. Over the same period, Washington and North Carolina have experienced declines of 21.3% and 11.6%, respectively.

In instances of both significant growth and decline, we can attribute the shifts to the offerings of a few schools that have shifted strategy and priorities with respect to certificates, suggesting an opportunity for the market at large.

### Percent Change in Undergraduate Certificate Representation





# Graduate Certificate Growth by State

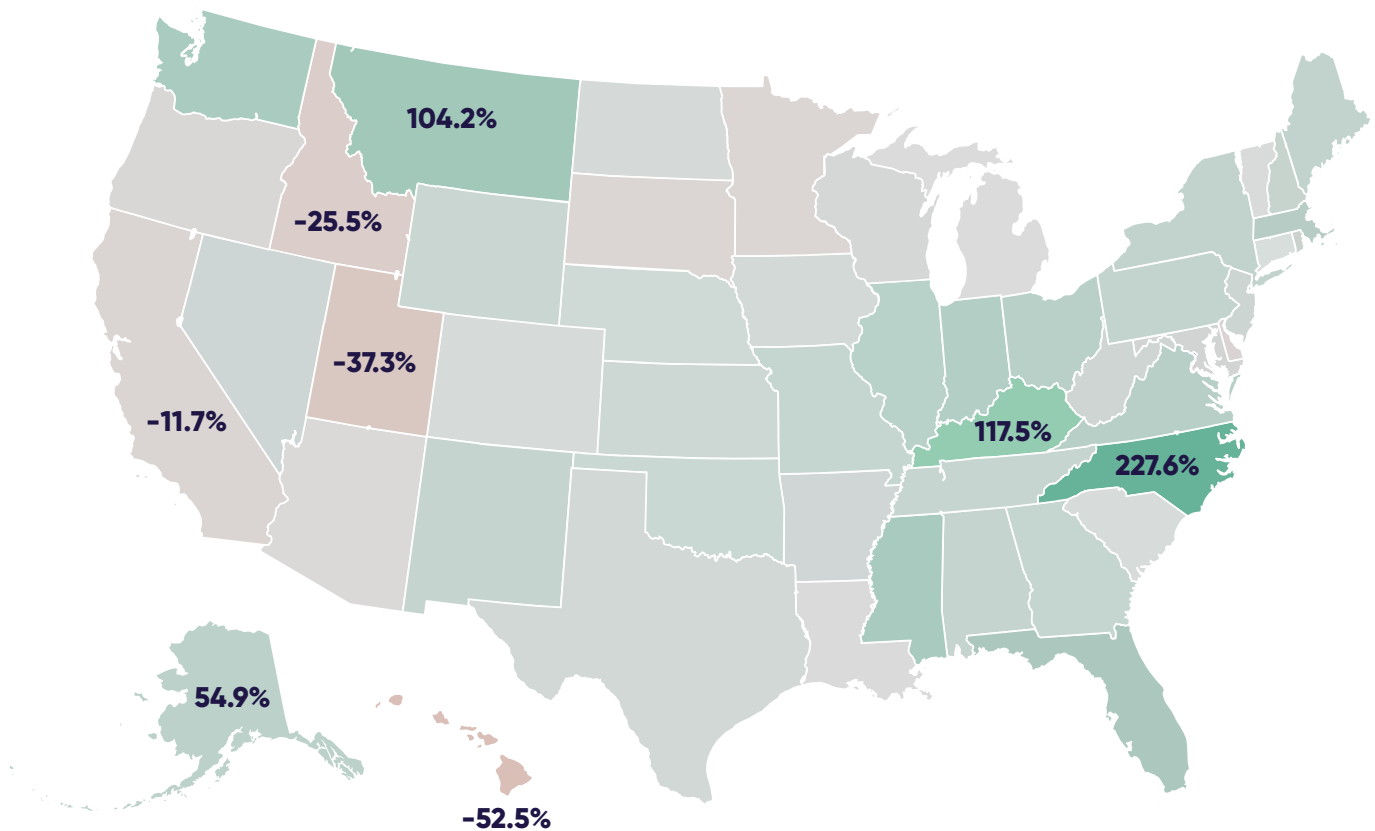
From 2019 to 2023, North Carolina, Kentucky and Montana experienced the most significant increases in graduate certificate completions. Conversely, California, Hawaii, Utah and Idaho have seen a decline in completions during this period.

In California, many universities have ceased offering graduate certificates. Utah's situation is also striking, with only nine institutions offering graduate certificates.

In North Carolina, one university within the state system has emerged as a major player, representing more than 30% of all graduate certificate completions and achieving a remarkable growth of greater than 250% over the last five years. Montana's growth is similarly concentrated, with nearly all completions in 2023 attributed to just two universities.

Kentucky stands out for its diverse growth across institutions, with twelve different schools recording increases in demand over the past five years.

## Percent Change in Graduate Certificate Representation



Source: NCES IPEDS Completions Data 2023

**% Change in Graduate Cert**

-52.5%

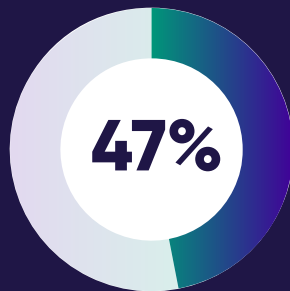
227.6%

# Perception on the Value of Higher Education

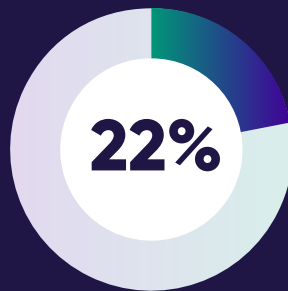
According to the Pew Research Center, only 47% of Americans currently believe a college degree is worth the expense if no loans are involved. When loans are required, this figure drops to 22%, with 29% of people considering the cost to be unjustifiable.

## Perception on the Value of Higher Education

### Say College is Worth it

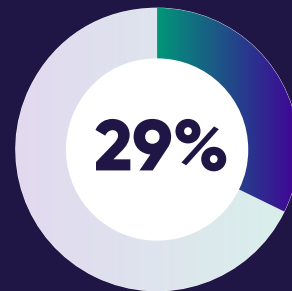


When Loans  
are not Involved



When Loans  
are Involved

### Say College is not Worth it



Source: Pew Research

# Apprenticeships

The U.S. Department of Labor highlights apprenticeships as a valuable pathway that combines classroom learning with hands-on job training, particularly for high-skill careers. As views on the value of a college degree shift—especially given rising concerns about college costs—apprenticeships present a more affordable alternative that does not require taking on student debt.

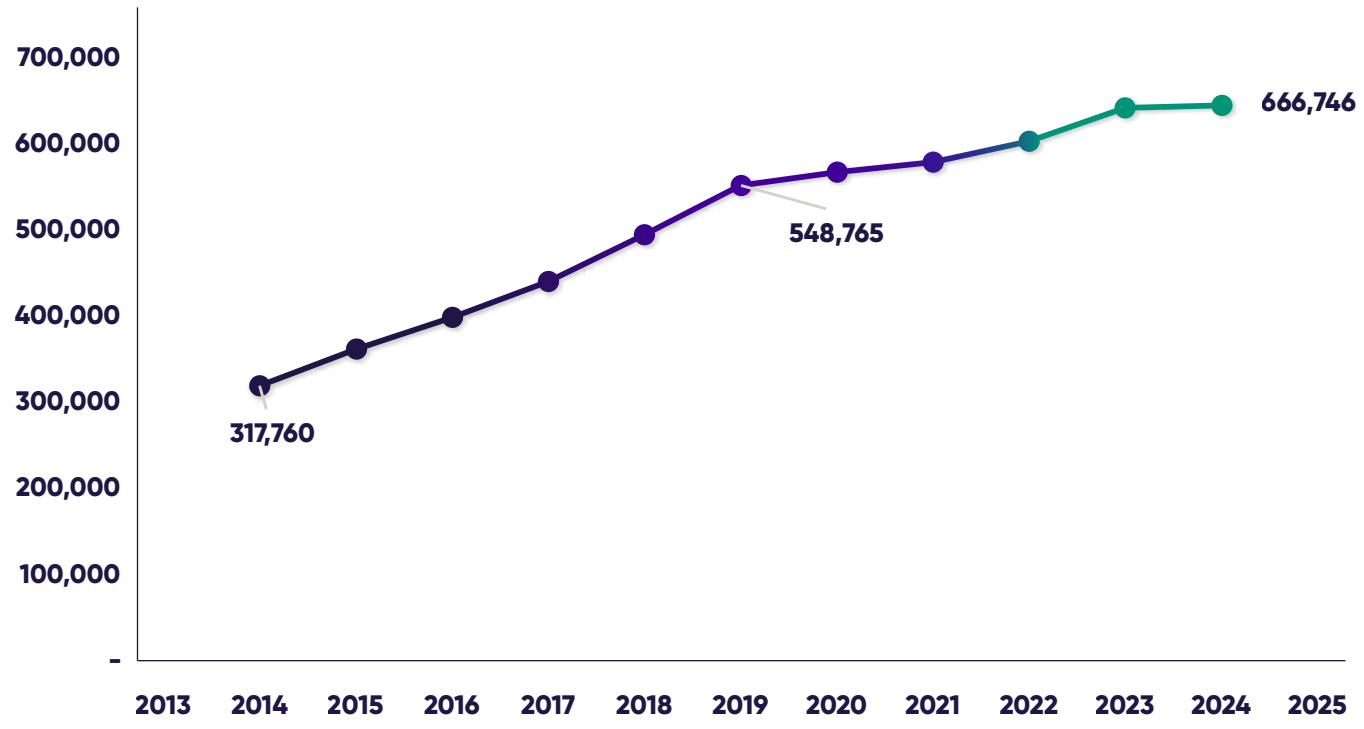




# Active Apprenticeship Growth

Over the past decade, apprenticeships have increased over 100%, from about 317,000 to 640,000. In 2024, the highest concentrations of apprenticeships could be found in California, Texas and Ohio. Overall, we have seen an increase in the number of fields in which apprenticeships are being offered and completed.

### Active Apprenticeships (2014-2024)



Source: US Department of Labor, Apprenticeship USA Active Apprenticeships

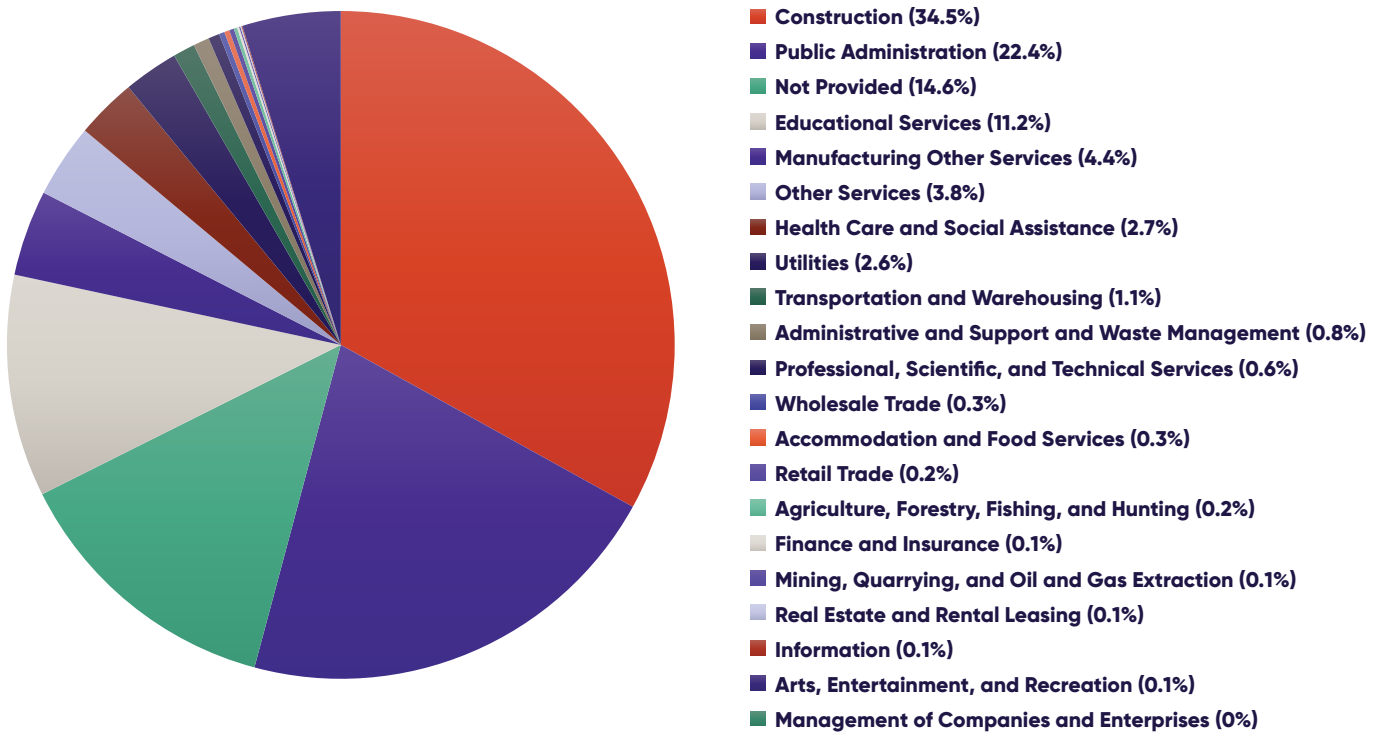




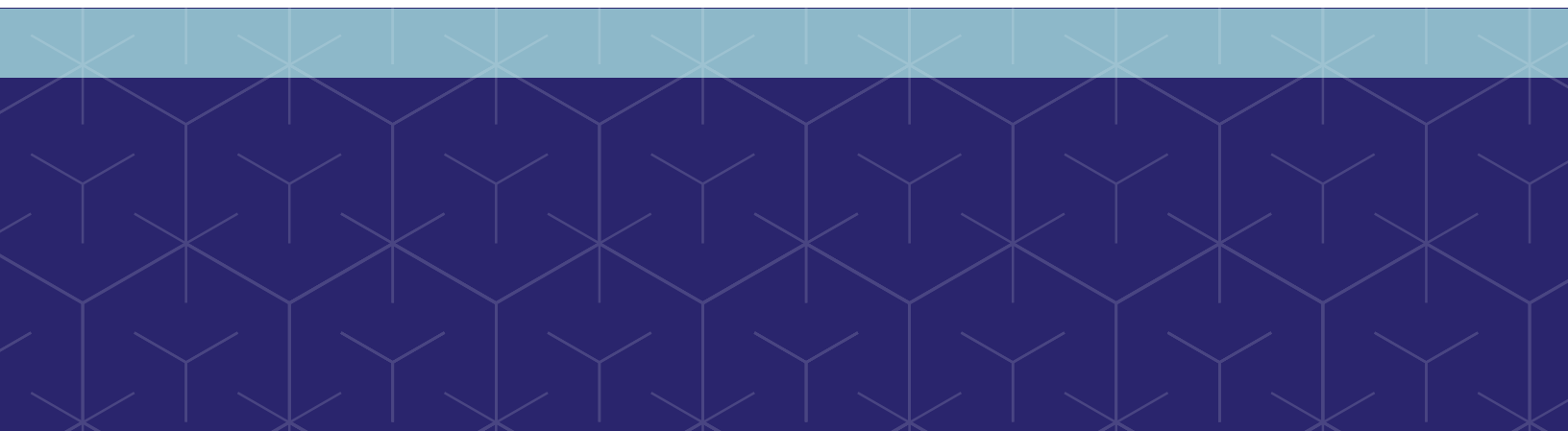
# Industry Participation

Construction and Public Administration account for more than half of all apprenticeships by industry. Meanwhile, the Finance and Insurance (17.3%) and Health Care and Social Assistance (9.3%) industries have grown at the fastest rate between the 2023 and 2024 fiscal years.

## Apprenticeship by Industry - 2024



Source: Registered Apprenticeship Partners Information Database System (RAPIDS)



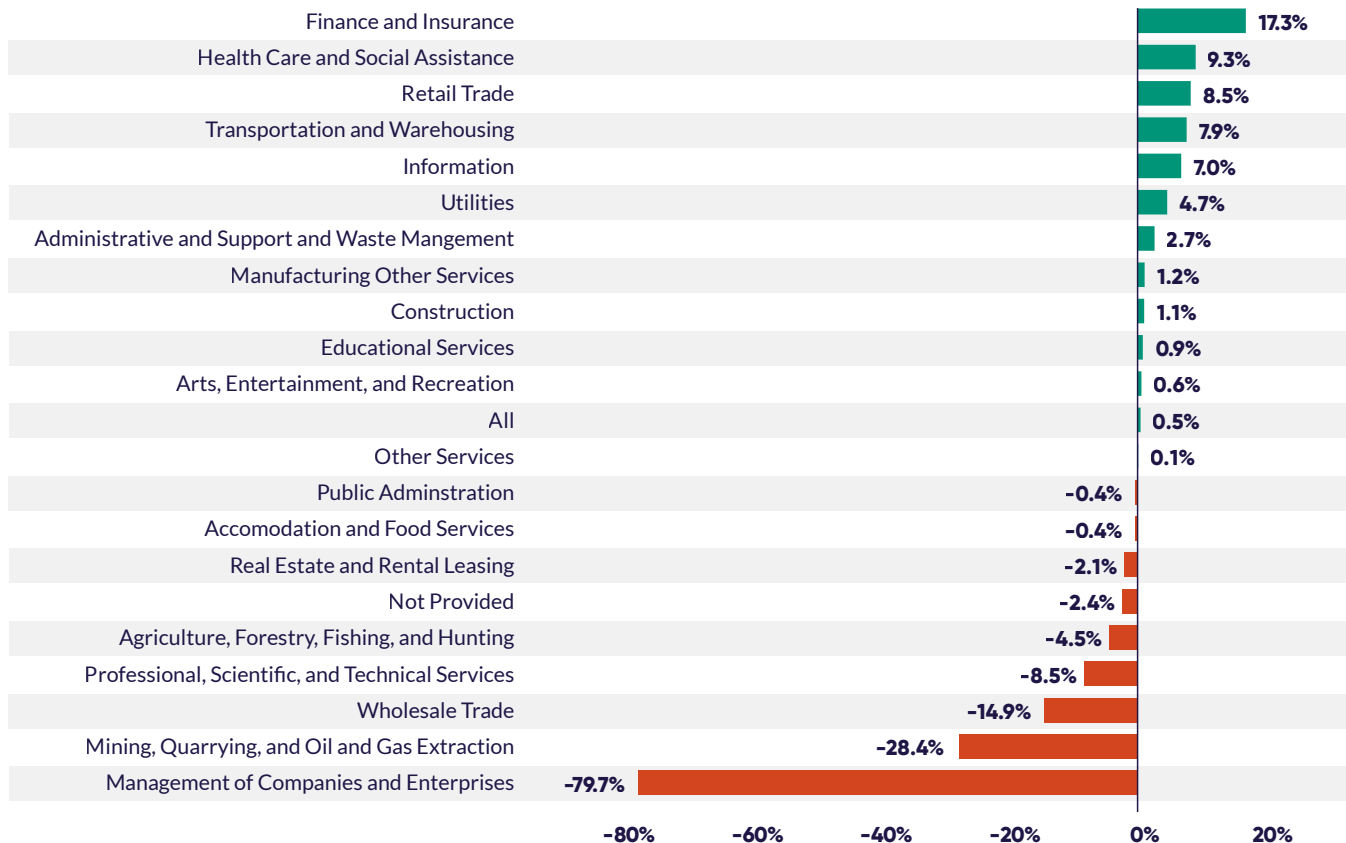




# Year-Over-Year Growth by Industry

Industries with strong growth trends offer promising opportunities for apprenticeships. The Health Care and Social Assistance sector, with a 9.3% year-over-year growth and a 906.5% increase over ten years, has a significant demand for skilled workers. The Finance and Insurance industry also shows potential with a 17.3% year-over-year growth and a 413.6% 10-year growth. The Professional, Scientific and Technical Services sector, despite a recent year-over-year decline of -8.5%, has seen impressive long-term growth of 1417.4%, indicating future potential for apprenticeships. The Administrative and Support and Waste Management sector, with a 2.7% year-over-year growth and a 315.5% increase over ten years, also suggests a growing need for apprenticeships. Conversely, sectors like Manufacturing and Construction, which have slower growth rates, offer more limited opportunities. Industries experiencing significant declines, such as Management of Companies and Enterprises and Mining, Quarrying and Oil and Gas Extraction, are less suitable for new apprenticeship programs in the near term. Overall, high-growth sectors like health care, finance and technical services are the most promising for expanding apprenticeship programs.

## Year-Over-Year Growth by Industry (2023-24)



Source: Registered Apprenticeship Partners Information Database System (RAPIDS)



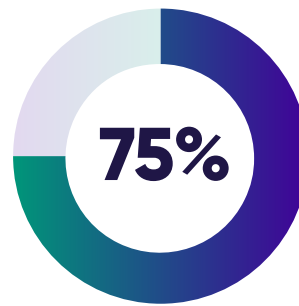
## Apprenticeship Perception

The middle class in America is believed to be increasingly losing ground because middle-skill career opportunities are becoming harder to find (Lerman 2016), while the costs of higher education needed for higher-skill careers continue to rise (National Center for Education Statistics 2022). At the same time, 87 percent of employers expect to face skills gaps within the next five years (Agrawal et al. 2020). Apprenticeships, which combine on-the-job learning with related instruction, can potentially help bridge the skills gap for workers and create positive returns for both workers and employers (Kuehn 2019; Lerman 2016).

### Apprenticeship Perception

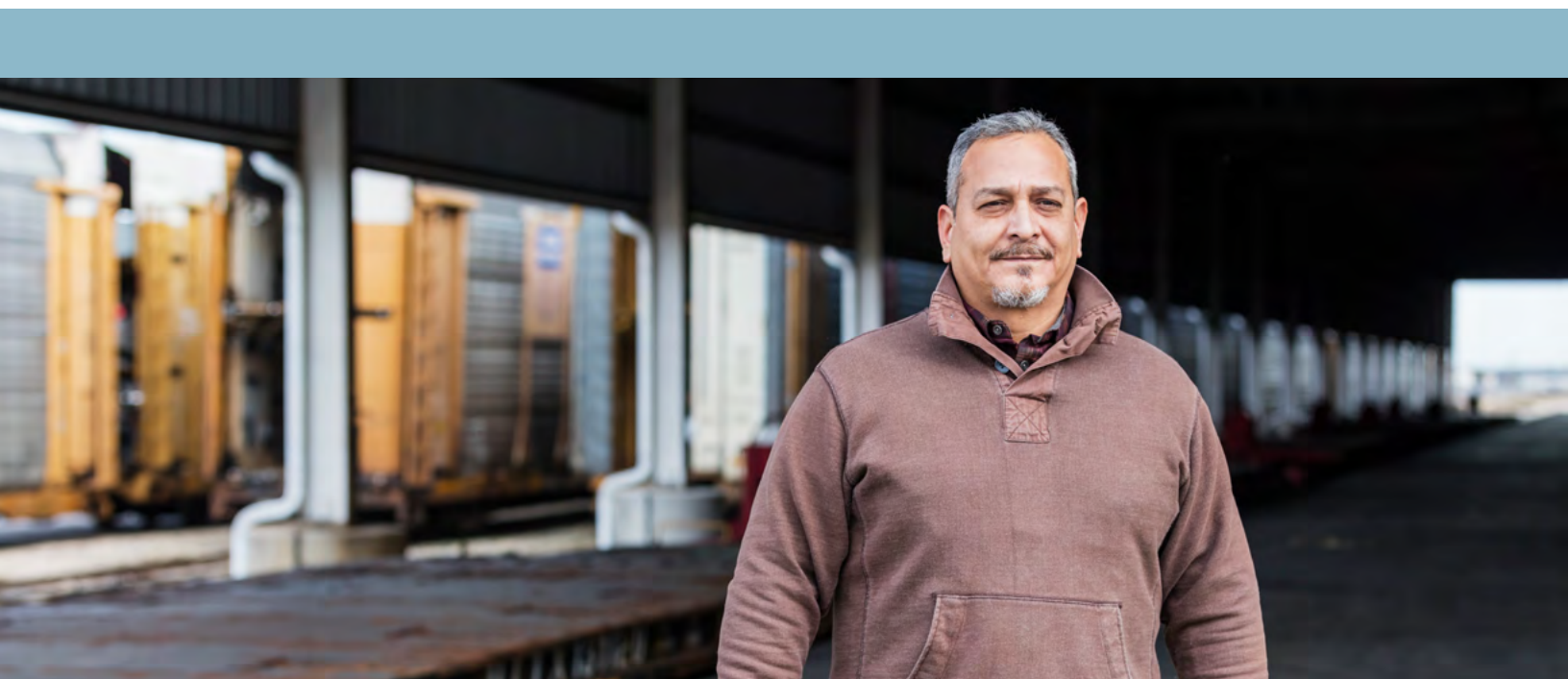


**Find Apprenticeship Accessible**



**Find Apprenticeship Appealing**

Source: [Hertfordshire Futures, Latest Survey Reveals that Growing Apprenticeship Awareness and Positivity is Hindered by a Confidence Gap](#), [OnLabor, The Promise and Pitfalls of Apprenticeships in American Workforce Development](#), [Education Next, The Divergent Roads to Post-Secondary Success](#)



# Some College, No Credential Update

The Some College, No Credential (SCNC) population has reached 36.8 million, reflecting a 2.9% increase from the previous year. This growth presents a significant opportunity for institutions to reengage the continuously growing market. Re-enrollment trends support optimism in engaging this group of students, with re-enrollment growing 9.1% in the 2022-23 academic year.

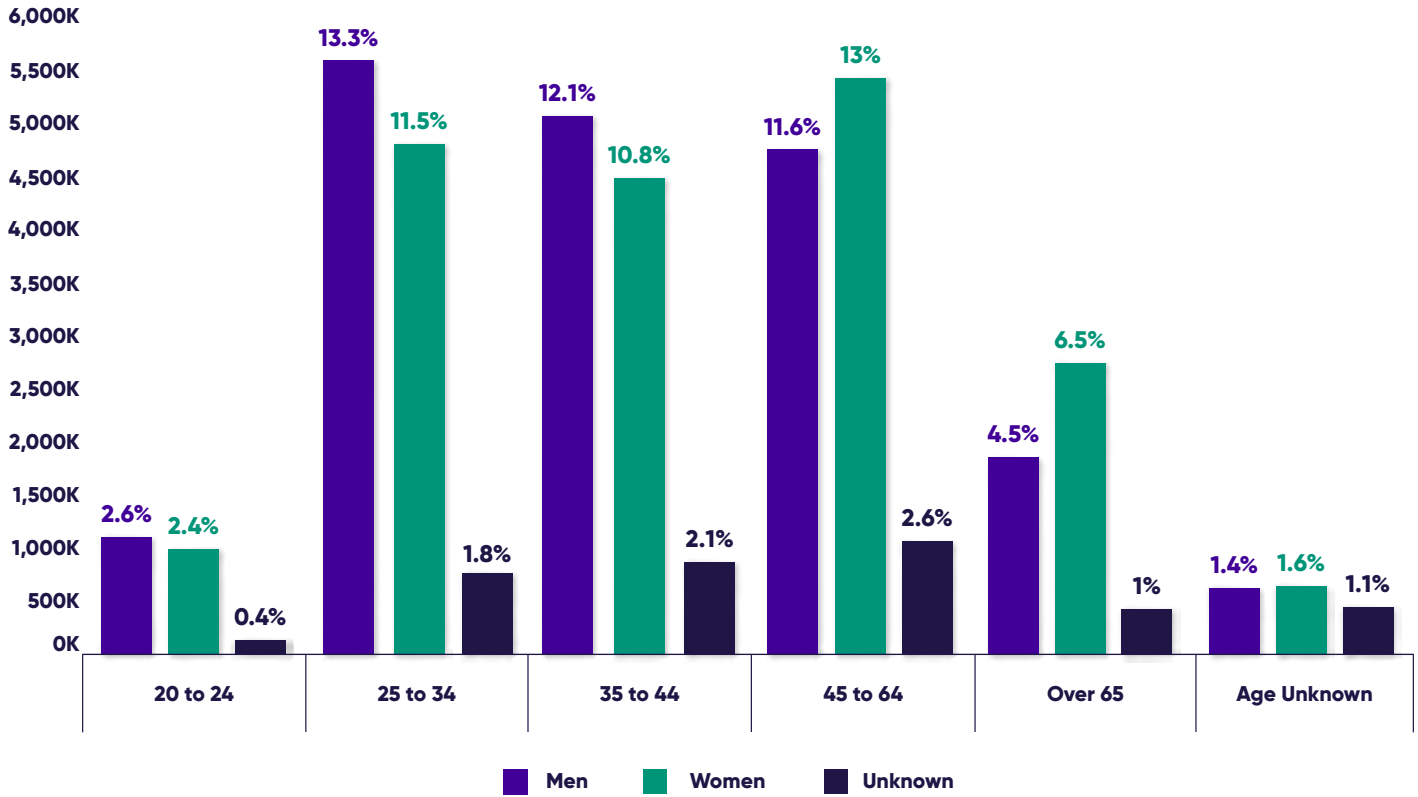




# Age and Gender

Men between the ages of 25 and 34 make up the largest portion of SCNC students (13.3%). However, women between the ages of 45 and 65 account for 13% of all people classified as SCNC.

## Age and Gender



Source: National Student Clearinghouse; Some College, No Credential Student Outcomes Report





## Major Fields of Study for Some College, No Credential Students

At the bachelor's level, those classified as SCNC previously studied: Business, Management, Marketing and Related Support (19%), Liberal Arts and Sciences, General Studies and Humanities (10.4%) and Social Sciences (8.1%).

For associate degree programs, fields with the largest portion of SCNC are: Liberal Arts and Sciences, General Studies and Humanities (57%), Business, Management, Marketing and Related Support (9.4%), Health Professions and Related Clinical Sciences (5.8%).

Undergraduate Certificate programs have the largest SCNC populations in the following fields: Health Professions and Related Clinical Sciences (29.1%), Business, Management, Marketing and Related Support (13.1%) and Security and Protective Services (8.3%).



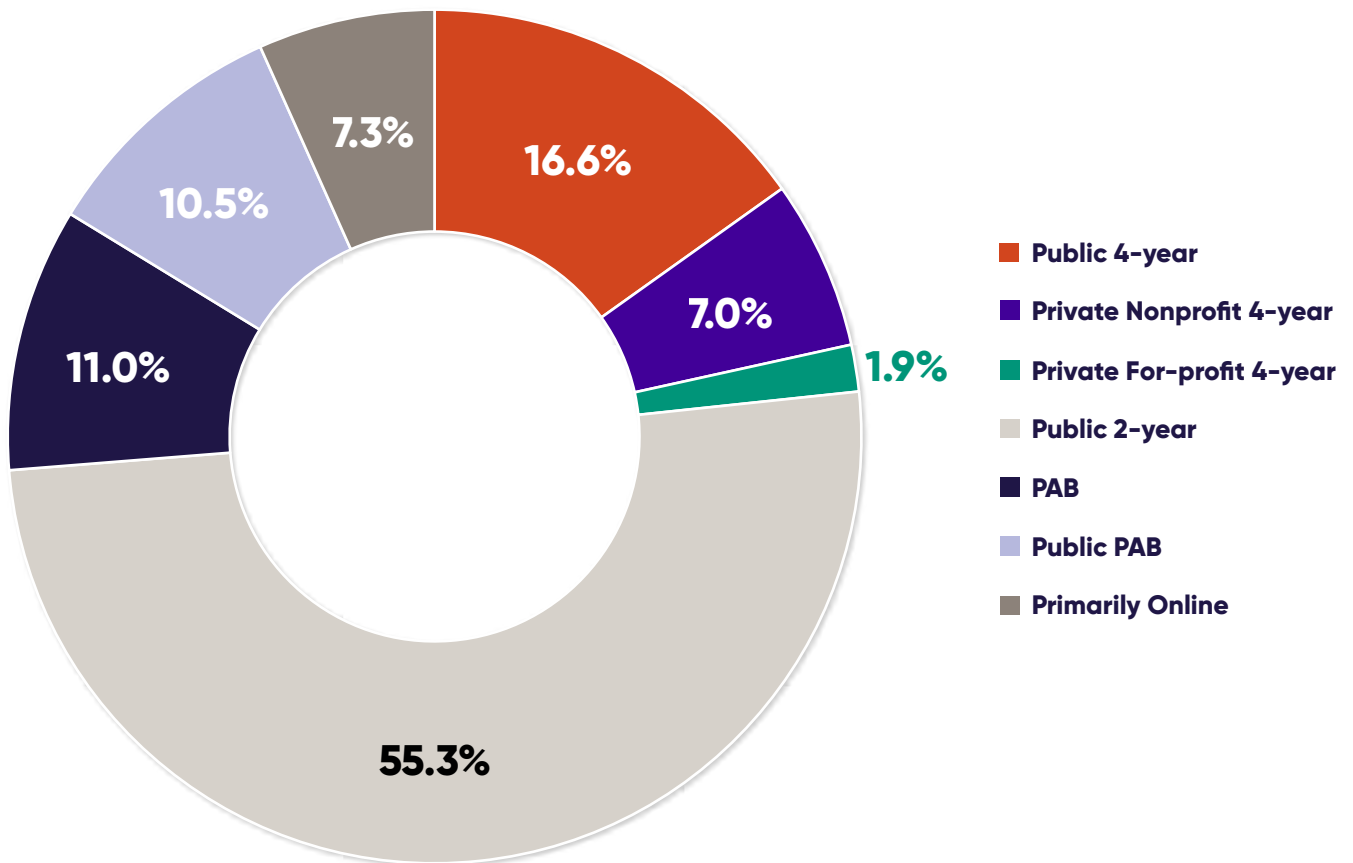


## Re-enrollees

The largest proportion of students who re-enrolled were previously enrolled in a public 2-year institution (55.3%) followed by public 4-year (16.6%). Students re-enroll at institutions in the same sector 57.8% of the time.

Re-enrollees are defined as students who hold a valid (full-time or part-time) enrollment record at least once during the academic year following a stop out of at least three consecutive terms.

**Sector of Previous Enrollment for Re-enrollees (SCNC)**



Source: National Student Clearinghouse; Some College, No Credential Student Outcomes Report



# Pathways

If we consider the subset of the SCNC population identified as re-enrollees, the most common pathway for these students is leaving a public 2-year institution then reengaging at a public 2-year institution (38.2%). Nearly 7% of students go from a public 2-year university to a primarily online institution. Students move from a public 4-year institution to another public 4-year institution 6.9% of the time.

## Pathways for Some College, No Credential Students

		Sector of Re-Enrollment					
		Public 2-year	Public 4-year	PAB	Private Nonprofit 4-year	Primarily Online	Private For-profit 4-year
Sector of Last-Enrollment	Public 2-year	38.2%	6.9%	3.4%	2.3%	2.2%	1.3%
	Public 4-year	5.1%	2.2%	6.9%	1.1%	0.8%	0.4%
	PAB	2.1%	1.2%	0.6%	0.4%	5.7%	0.3%
	Private Nonprofit 4-year	1.8%	1.1%	0.9%	2.6%	0.3%	0.3%
	Primarily Online	1.7%	4%	0.5%	0.5%	0.3%	0.3%
	Private For-profit 4-year	0.6%	0.5%	0.1%	0.1%	0.1%	0.4%

Source: National Student Clearinghouse; Some College, No Credential Student Outcomes Report

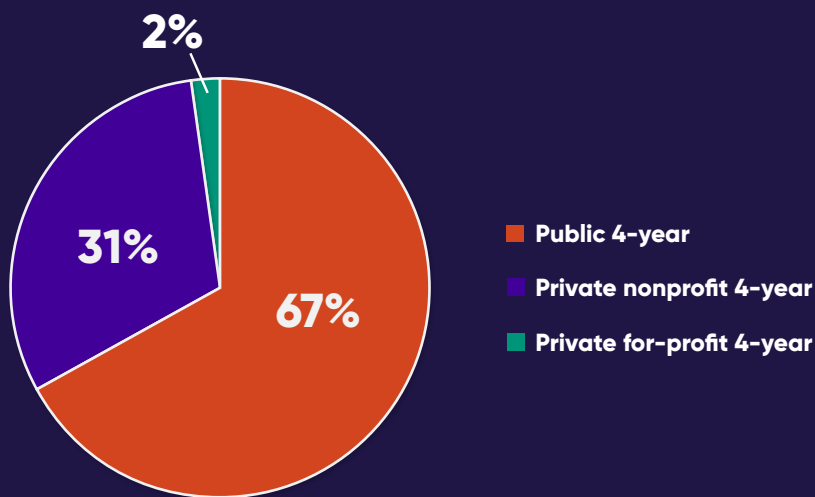
# International Students

International students represent another opportunity for institutions seeking to boost enrollments and enhance global reputation.

## Undergraduate International Students by Sector

Based on Fall 2022 undergraduate enrollment data, the largest portion of undergraduate international students in America are enrolled in public institutions. Nearly 67% of all fall international enrollments can be found at public institutions.

### International Students by Institution Type



Source: NCES IPEDS Fall Enrollment 2022; Undergraduate, first-time degree/certificate-seekers



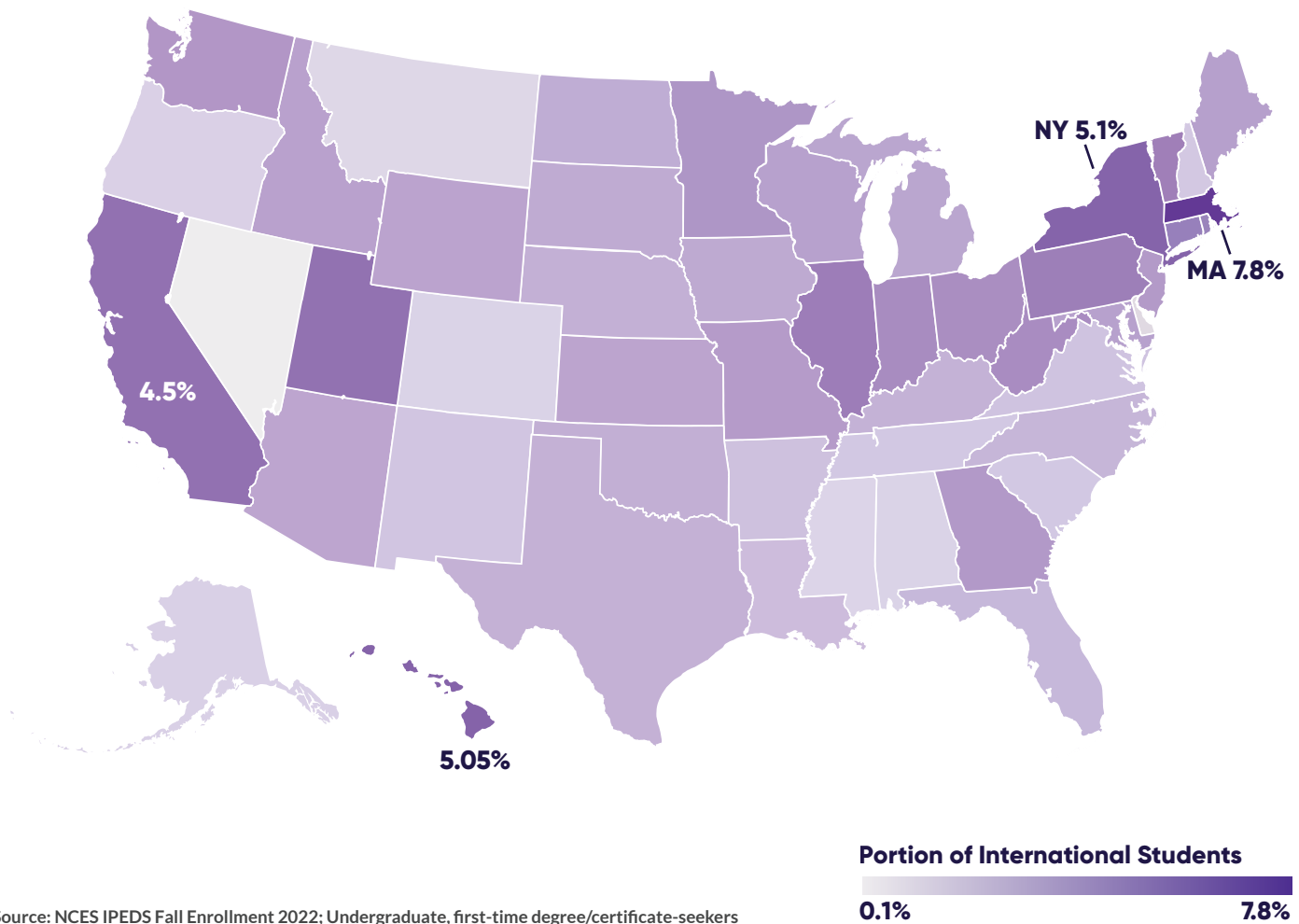




# Undergraduate International Students by State

International students account for the largest portion of fall enrollments in Massachusetts (7.8%), Hawaii (5.1%), New York (5.1%) and California (4.5%).

## Proportion of Enrollments from International Students Undergraduates, First-time Degree Seekers





# Conclusion

Higher education institutions must adapt to the evolving labor market, shifting demographics, and technological advancements that are powering the new Era of the Modern Learner. To effectively navigate these challenges and seize emerging opportunities, we recommend the following:

- 1. Build a Unified Brand and Enrollment Strategy:** Age no longer predicts learning modality. Younger students are more regularly choosing to enroll part-time, in online programs, or seek out alternative credentials like certificates and apprenticeships. A unified brand and enrollment strategy allows schools to effectively and efficiently engage with prospective and current students based upon their chosen and individualized pathway.
- 2. Focus on Practical Skills and Career Outcomes:** Prioritize the development of programs that emphasize practical skills and career outcomes. This involves collaborating with industry partners to ensure curricula are aligned with current job market demands, particularly in sectors experiencing growth.
- 3. Expand Alternative Credential Offerings:** The rising interest in certificates and apprenticeships highlights a shift in student preferences. Institutions should expand their offerings of alternative credentials, making them accessible and affordable to meet the needs of students seeking cost-effective pathways to employment.
- 4. Enhance Dual Enrollment Programs:** The popularity of dual enrollment among high school students suggests a growing demand for flexible educational pathways. Institutions should invest in and promote these programs, providing high school students with early exposure to college-level coursework, thereby easing their transition into higher education.
- 5. Engage the Some College, No Credential (SCNC) Population:** The significant increase in SCNC re-enrollments presents a unique opportunity for tailored educational offerings. Institutions should develop targeted outreach strategies and support services to re-engage these learners.
- 6. Leverage International Student Presence:** International students are a vital component of the higher education ecosystem, enhancing cultural diversity and global perspectives. Institutions should implement strategies to attract and support international students, thereby enriching the academic environment and expanding their global appeal.

# Conclusion (continued)

In summary, higher education is at a pivotal moment as it responds to internal and external forces of change. While challenges abound, there are also promising trends, including increased enrollment across degree levels and a growing interest in flexible education pathways. To thrive in this evolving environment, institutions must embrace adaptability and align their programs with student demands and preferences.

By prioritizing career outcomes, affordability and flexibility, higher education institutions can enhance their competitiveness and better support the diverse aspirations of today's Modern Learners.

Ultimately, the future of higher education relies on a proactive and responsive approach, ensuring that institutions remain vital contributors to workforce readiness and economic stability in an ever-changing world.



# Grow Your Enrollments in 2025

At EducationDynamics, we continuously monitor the higher education marketing and enrollment management landscape. By evaluating external forces, monitoring marketing and student engagement trends, and speaking with current and prospective students, we gain unmatched insights into the student journey. Our full suite of services and solutions touch the entire student lifecycle, from inquiry generation to enrollment management, marketing, branding, contact center services, and more. We give our college and university clients the flexibility to talk to prospective students where they live, moving them smoothly through the engagement funnel from the first point of contact to graduation.

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