

Trends in Higher Education

Student Access

Legislative Analyst's Office **2024**

Introduction

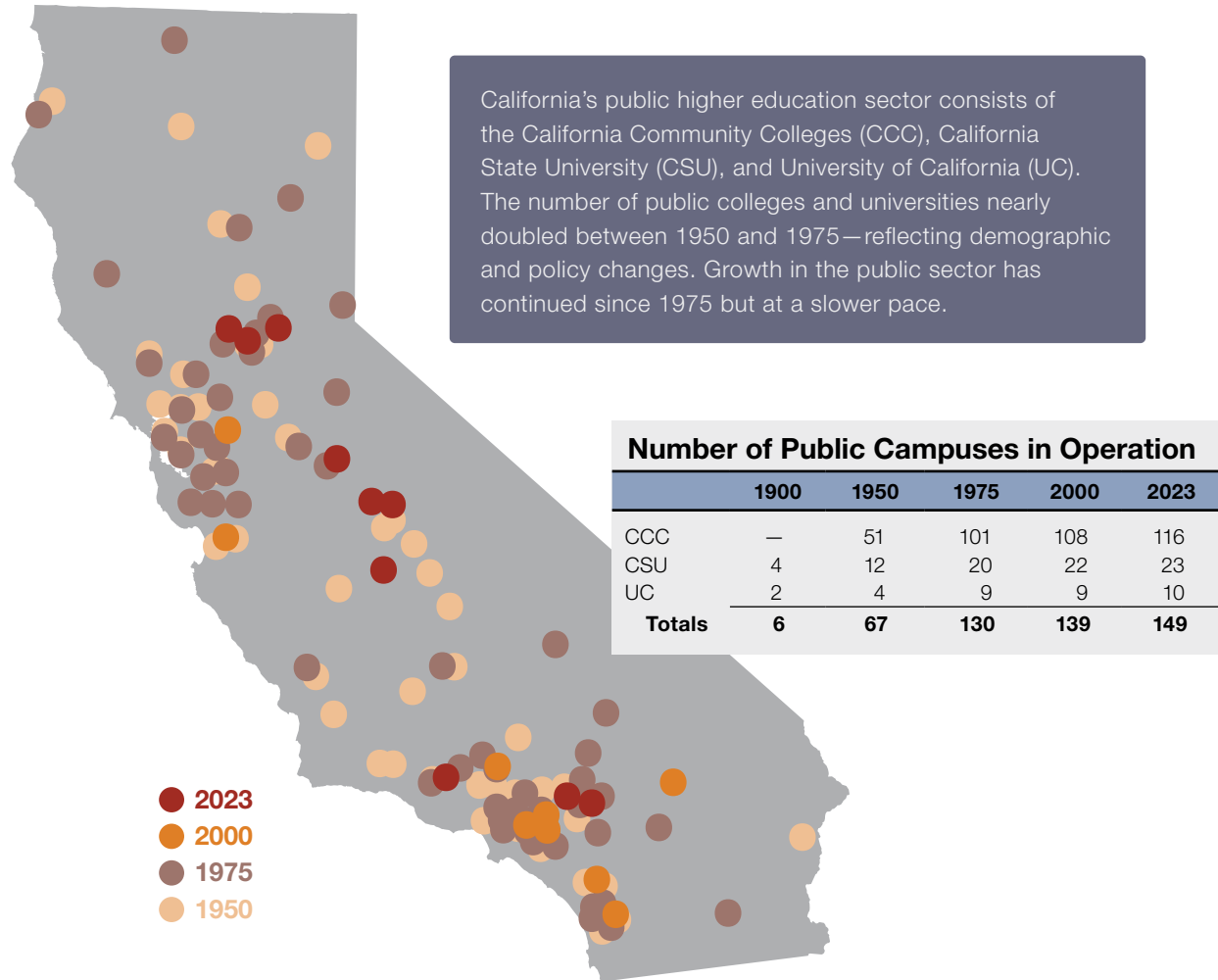
This brief is the first of a new six-part analytical series focused on higher education trends. Each part of the series hones in on a major area of higher education, beginning with student access, followed by college affordability, student outcomes, finance, faculty and staff, and facilities. The series has two main objectives. The first is to help legislators, staff, and the general public track many of the key changes that higher education has undergone over the past few decades. The second is to help legislators and staff leverage their better understanding of the past to aid them in better navigating the future. To this end, each brief is punctuated by key issues for legislators to consider as they move forward in making higher education policy and budget decisions.

The six briefs within the series each contains a set of infographics highlighting trends over time. In compiling the series, we draw primarily from data sources at the federal, state, and segment levels, as these sources tend to contain the most relevant, accurate, and complete data available on higher education policy and fiscal issues. We tend to provide data for the past one to three decades. We select the exact time period for each chart by considering the availability of the particular data at issue, comparability of the reported data over time, and the most interesting trends emanating from the data. Because the focus is on trends over time, we adjust funding and spending data for inflation, such that the infographics show changes in real terms. Throughout the series, we give greatest attention to trends in California, but we also cover national trends when helpful for broader context.

Whereas this 2024 series focuses on higher education changes over time, [California's Education System: A 2019 Guide](#) explains the inner workings of the state's education system. Much of that guide remains relevant today and can assist those who are looking for more basic information on education policy and fiscal matters in California.

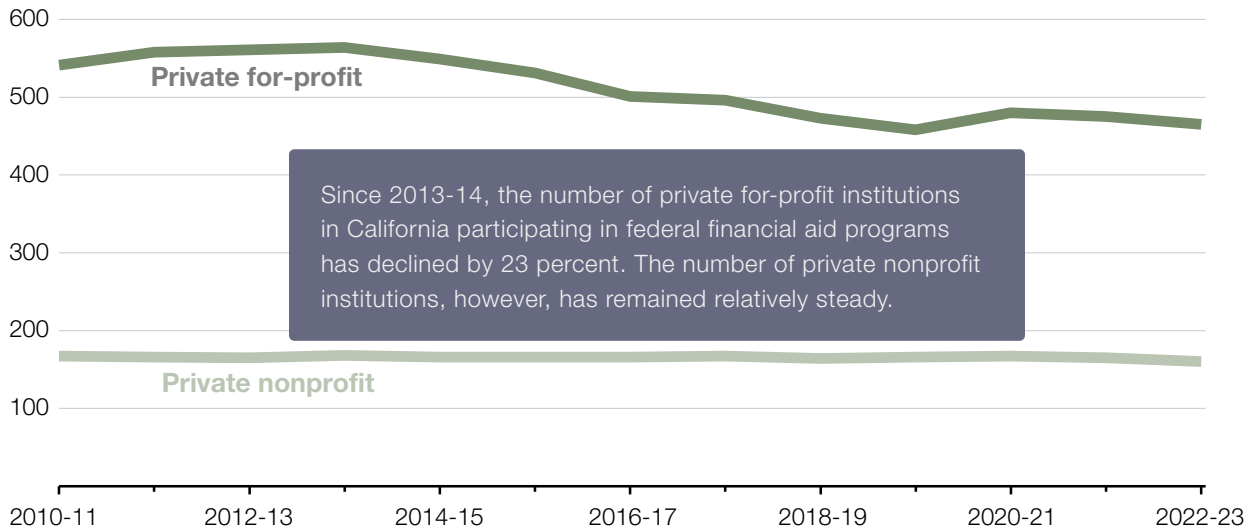
California's Public Higher Education Sector Was Built Over Many Decades

Public Campuses in Operation



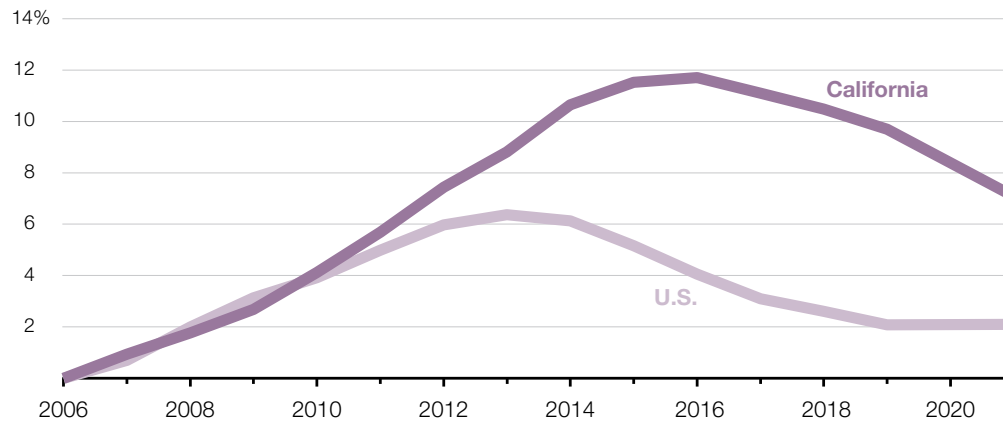
Number of Private Colleges and Universities in California Is Down

Number of California Private Institutions Participating in Federal Financial Aid Programs



College-Age Population Has Peaked and Started to Decline

Cumulative Percent Change in Age 18-24 Population Since 2006



Since peak levels, the college-age population has shrunk by nearly 1.3 million (4 percent) nationally and nearly 175,000 (4.1 percent) in California.

College Participation Rate Has Dipped Since 2017-18

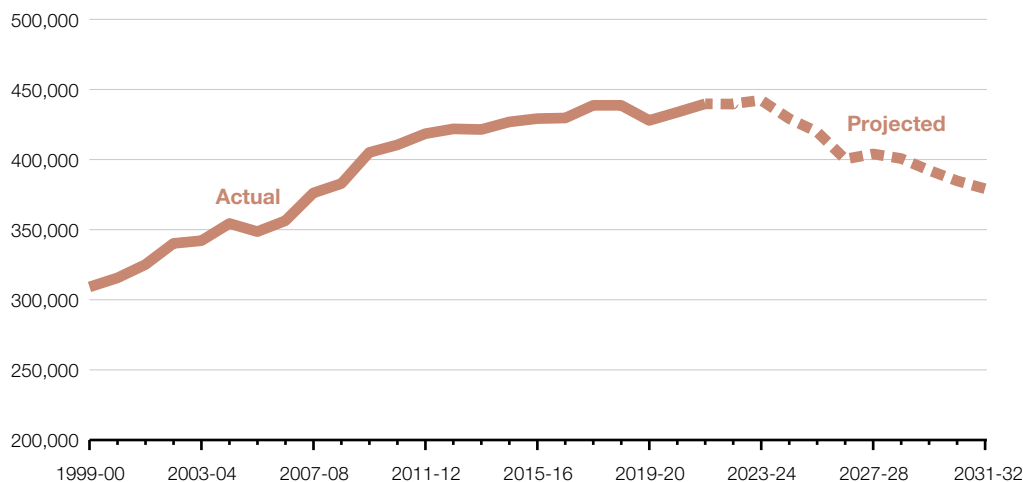
Percent of California Public High School Completers Enrolling in Postsecondary Education by Segment

	Any College	CCC	CSU	UC	In-State Private	Out of State
2014-15	64%	37%	12%	6%	3%	7%
2015-16	67	38	12	8	3	7
2016-17	65	36	12	7	3	6
2017-18	68	37	13	7	3	7
2018-19	65	36	12	7	3	7
2019-20	63	34	12	8	3	7
2020-21	62	32	12	8	3	8

Note: Chart reflects the percent of public high school completers who enrolled at each segment within 12 months of completing high school.

High School Graduates Are Projected to Begin Declining After 2023-24

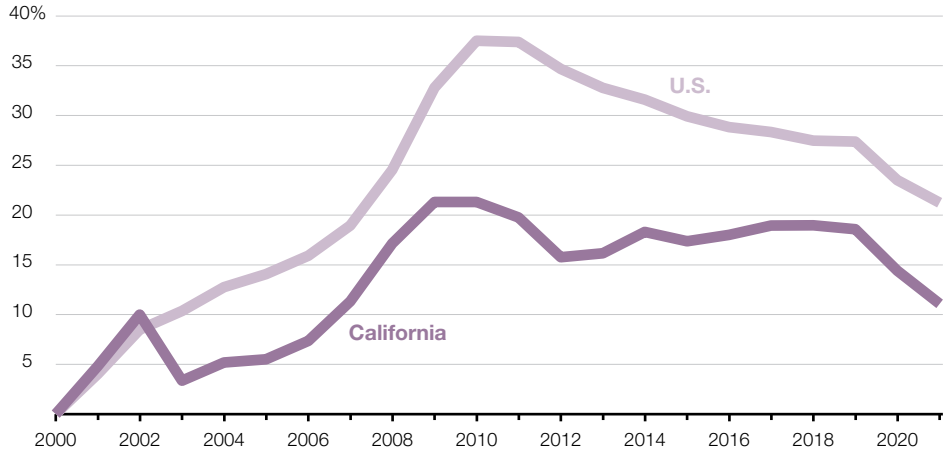
California Public High School Graduates



The number of public high school graduates in California is expected to peak in 2023-24, followed by several years of declines. By 2031-32, high school graduates are projected to be 14 percent below the peak level.

Total Enrollment Also Has Peaked and Started to Decline

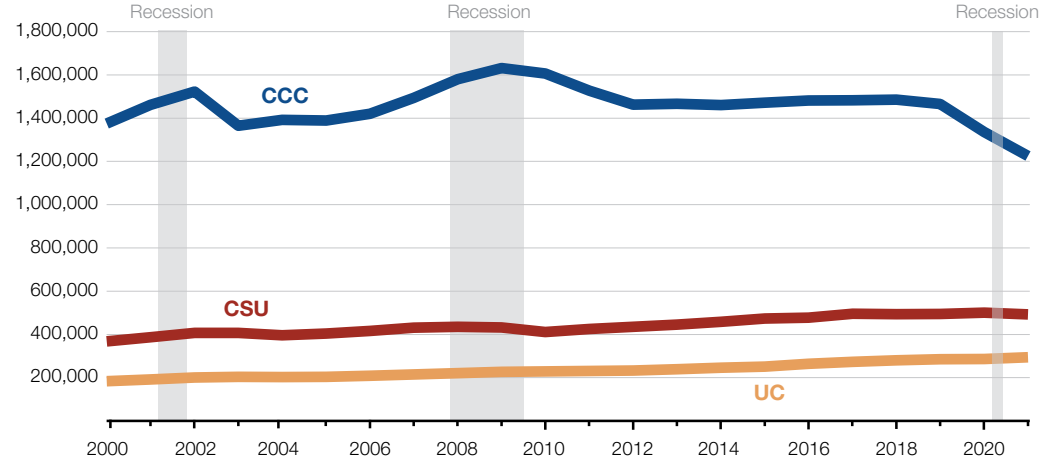
Cumulative Percent Change Since 2000 in Fall Headcount at Postsecondary Institutions



Since peak levels, total higher education enrollment has shrunk by about 2.5 million students (12 percent) nationally and 240,000 students (8.4 percent) in California.

Community College Enrollment Is More Tightly Linked to Economic Cycles

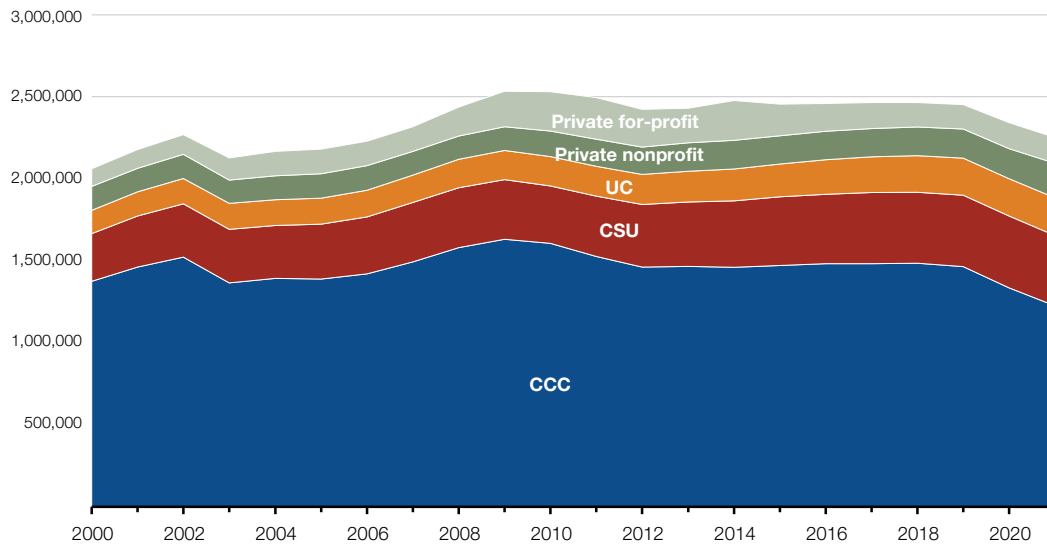
Fall Headcount



Community college enrollment tends to be countercyclical—increasing during recessions, as job markets weaken. The COVID-19 recession was an exception, as it was short-lived and followed by a very strong job market and declines in community college enrollment. Universities tend to be less affected by economic cycles.

Undergraduate Enrollment Is Shifting Toward Four-Year Universities

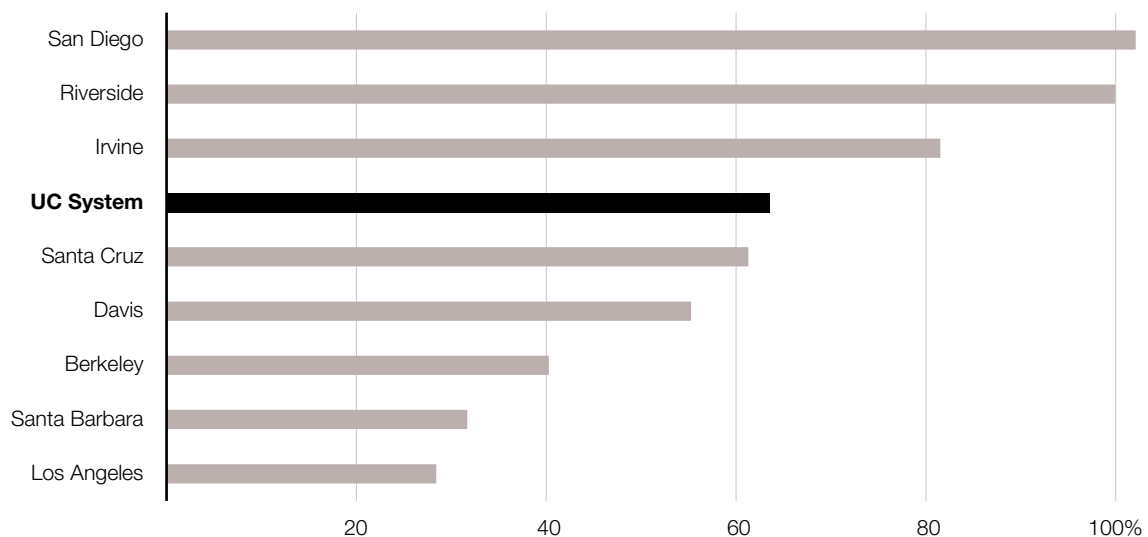
Undergraduate Fall Headcount by Segment



As community college enrollment has declined, overall enrollment at four-year universities has grown. Since 2010, CSU has grown from 14 percent to 19 percent of undergraduate enrollment, UC has grown from 7 percent to 10 percent, and the private nonprofit sector has grown from 6 percent to 9 percent.

Every UC Campus Has Grown Over Past 20 Years

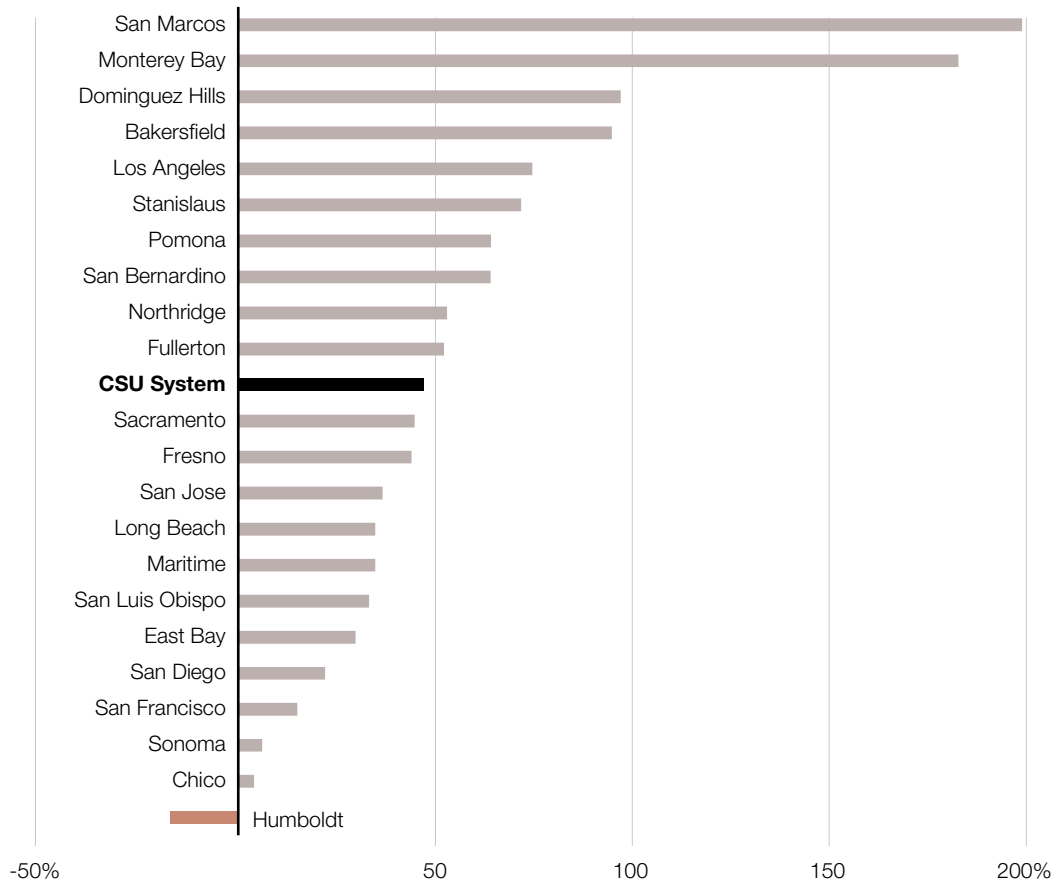
Cumulative Percent Growth in Undergraduate Fall Headcount, 2000 Through 2021



Excludes UC Merced, which opened in 2005, and UC San Francisco, which enrolls only graduate students.

Nearly Every CSU Campus Also Has Grown Over Past 20 Years

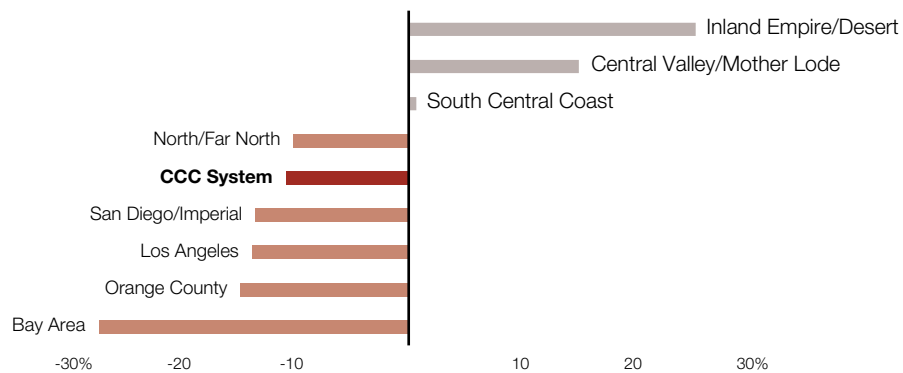
Cumulative Percent Growth in Undergraduate Fall Headcount, 2000 Through 2021



Excludes CSU Channel Islands, which opened in 2002.

Enrollment Has Declined in Most CCC Regions

Cumulative Percent Growth in Fall Headcount, 2000 Through 2021

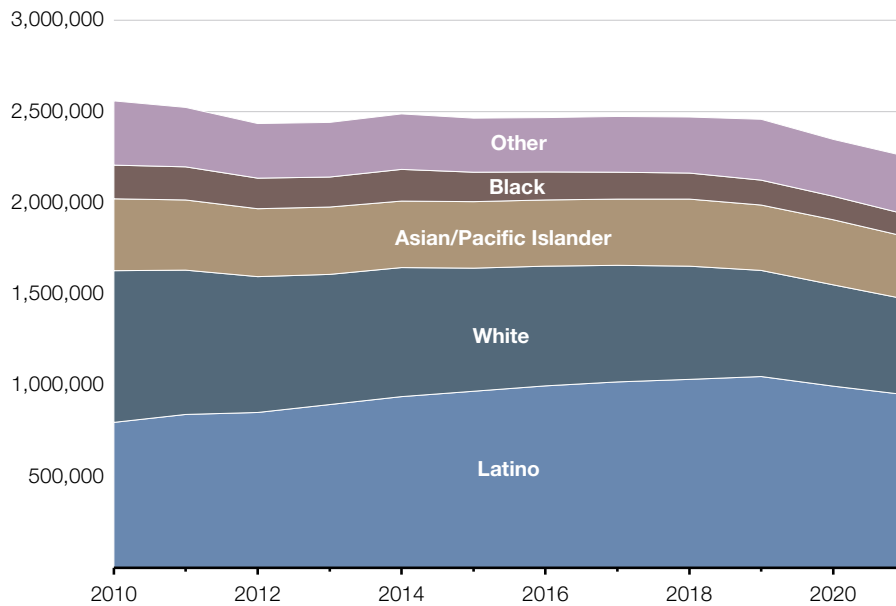


Key Issue

As the high school graduate and college-age populations decline, the segments are likely to begin competing more for students. The Legislature will continue to face key decisions about how much enrollment to fund at each of the public segments. Such decisions could have important implications for the size of each segment in the years to come.

Latinos Comprise a Growing Share of California's Undergraduates

Undergraduate Fall Headcount Across All Segments by Race/Ethnicity



From 2010 to 2021, the share of undergraduates who are Latino increased notably (from 31 percent to 42 percent). The share of undergraduates in other racial/ethnic groups declined, with the largest decline among white students (from 33 percent to 23 percent).

"Other" consists of American Indian students, multiracial students, international students, and students of unknown race/ethnicity.

Latino and Black Students Continue to Access UC at Lower Rates

Racial/Ethnic Distribution of Californians Age 18-24 and UC Resident Undergraduates

	2000		2010		2021	
	CA	UC	CA	UC	CA	UC
Latino	42%	14%	44%	20%	50%	31%
White	36	42	33	33	26	23
Asian/Pacific Islander	13	39	14	42	15	40
Black	7	4	8	4	8	5
American Indian	1	1	1	1	1	1
Totals	100%	100%	100%	100%	100%	100%

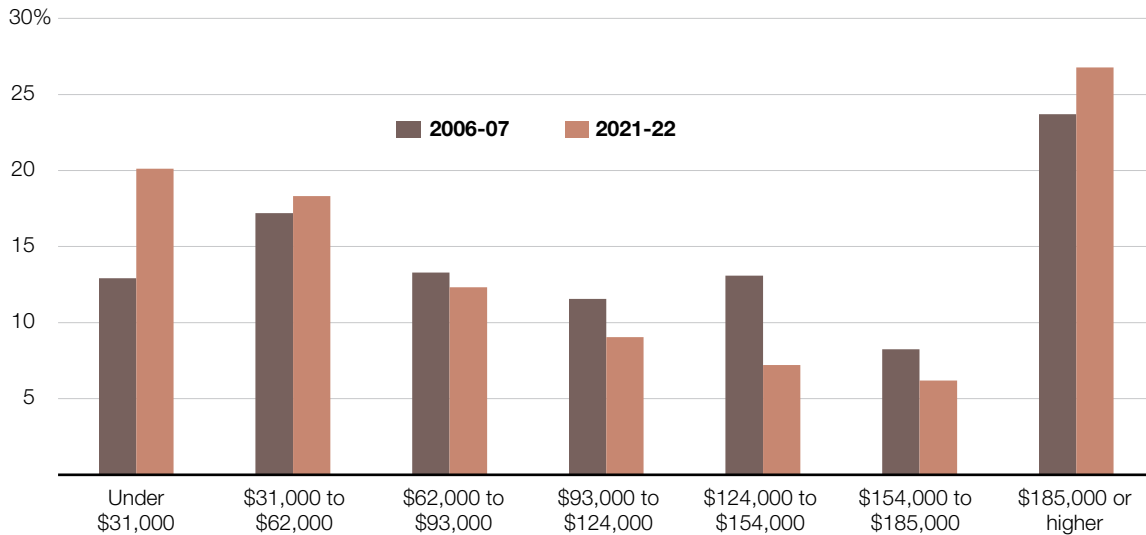
Note: Figure excludes individuals of unknown race/ethnicity or another race not listed in the figure.

In 1996, California voters approved Proposition 209 banning the consideration of race, sex, color, ethnicity, or national origin in public programs, including admission to public universities. Since then, UC (the state's most selective public segment) has adopted certain other practices to promote a diverse student body, including a "comprehensive review" policy beginning in fall 2002 that considers applicants' academic and non-academic achievements in the context of their opportunities and life experiences.

In 2023, the U.S. Supreme Court ruled that race-based admissions were unconstitutional, effectively ending the consideration of race at California's private institutions too.

Larger Shares of UC Undergraduates Are at Each End of the Income Spectrum

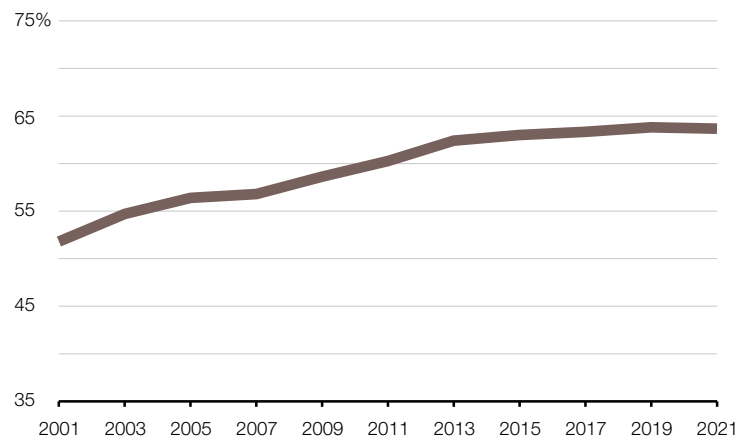
Distribution of UC Resident Undergraduates by Family Income (2021 Dollars)



UC and CSU also report data on “first-generation students”—specifically the percent of undergraduates whose parents do not have a bachelor’s degree or higher. From 2013 to 2022, the share of undergraduates who are first generation fell from 42 percent to 37 percent at UC and from 56 percent to 53 percent at CSU.

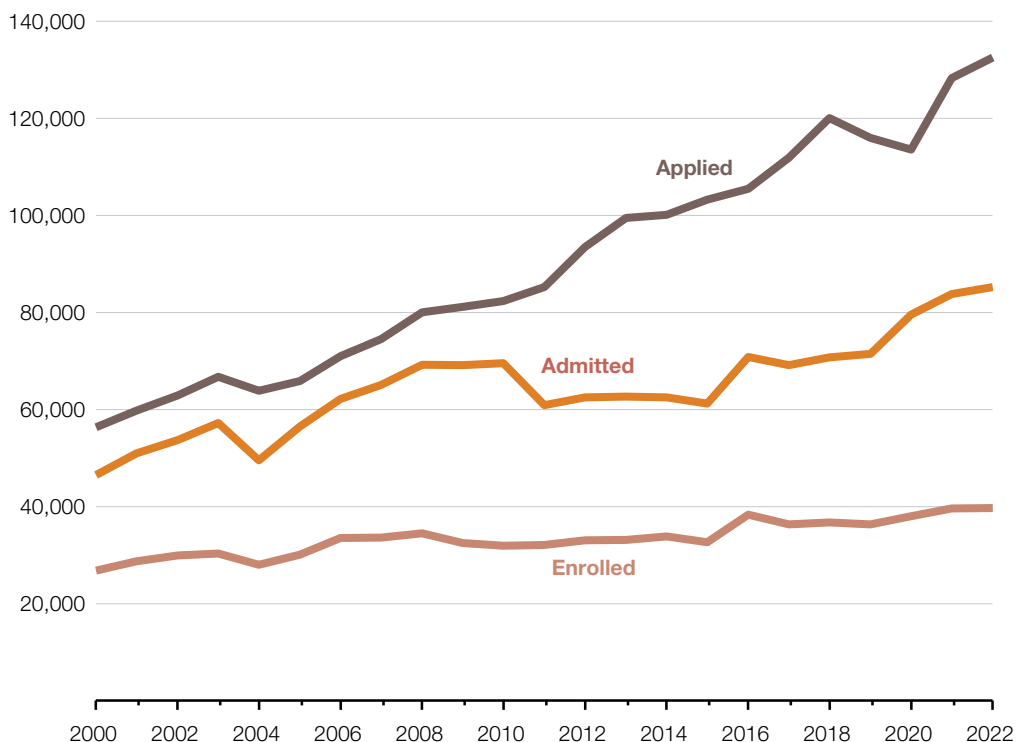
Growing Share of CCC Students Are Younger

Percent of CCC Students Who Are Under Age 25



Freshman Applications to UC Continue to Increase

California Resident Freshman Students Applying, Admitted to, and Enrolling at UC in Fall Term



Since 2000, more high schools have begun offering college-preparatory courses and more students have completed those courses. Additionally, UC has made several changes to its admission policies, including establishing comprehensive review and removing the requirement to submit standardized test scores. These factors have resulted in more students potentially being eligible to attend as freshmen. Notably, even as California’s college-age population has declined steadily since 2016, UC freshman applications have continued rising (up 26 percent).

Freshman Admission Rates Are Decreasing at Nearly All UC Campuses

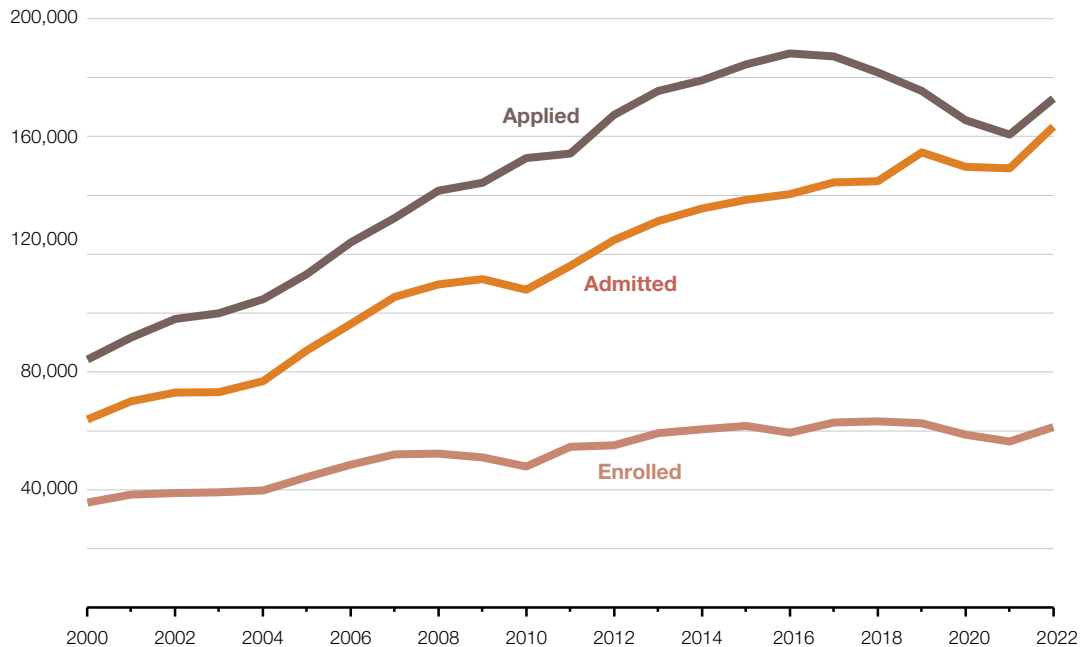
Percent of California Resident Freshman Applicants Who Are Admitted in Fall Term

	2002	2012	2022
Los Angeles	25%	19%	9%
Berkeley	26	18	14
Irvine	58	38	18
San Diego	44	32	24
Santa Barbara	52	42	27
Davis	64	45	32
Santa Cruz	84	61	43
Riverside	83	61	67
Merced	—	77	92

Under UC’s freshman referral policy, eligible applicants who are not admitted to their campus(es) of choice are redirected to the Merced campus. On average, fewer than 2 percent of redirected freshmen have enrolled at the Merced campus since this policy has been in place.

Freshman Applications to CSU Are Down From 2016 Peak

California Resident Freshman Students Applying, Admitted to, and Enrolling at CSU in Fall Term



Freshman Admission Rates Are Increasing at Most CSU Campuses

Number of CSU Campuses by Fall Admission Rate for California Resident Freshmen

Admission Rate	2018	2019	2020	2021	2022
90% or more	1	2	3	12	12
75-90%	3	8	12	6	6
50-75%	13	9	5	2	2
Less than 50%	6	4	3	3	3
Totals	23	23	23	23	23

Though CSU admission rates are increasing, some CSU campuses and programs remain impacted, with more student demand than enrollment slots. To manage demand, impacted campuses and programs adopt stricter admissions criteria. Six CSU campuses have all their academic programs impacted in 2023-24. Students who are not admitted to their CSU campus(es) of choice are redirected to other CSU campuses that have space.

Transfer Applications to UC Are Up Substantially Since 2000 but Dipped in 2022

California Resident Transfer Students Applying, Admitted to, and Enrolling at UC in Fall Term

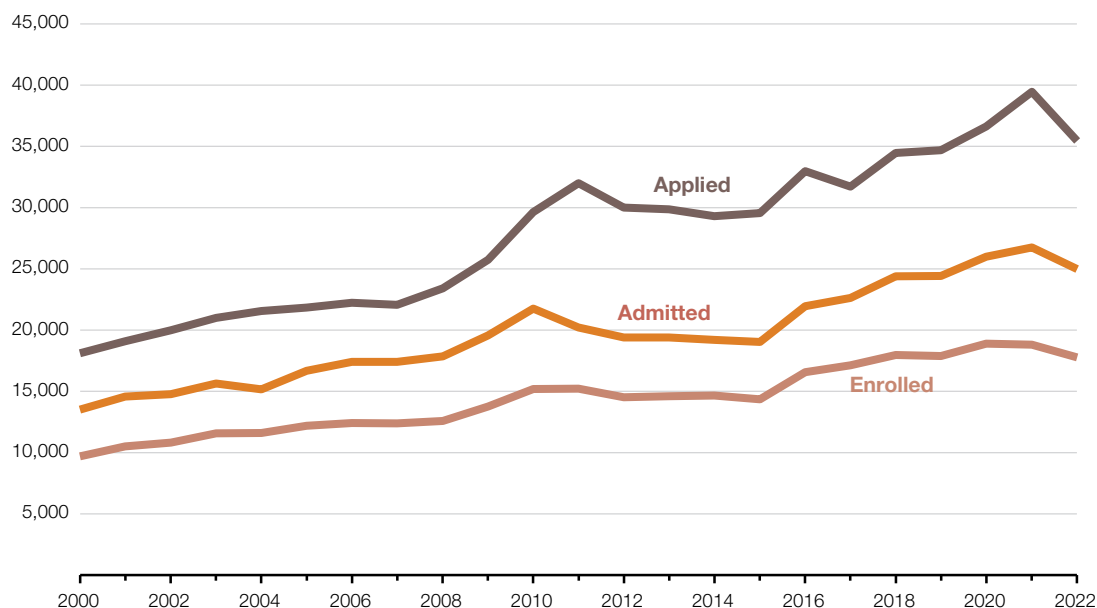


Figure includes students transferring from CCC as well as students transferring from other postsecondary institutions.

Transfer Admission Rates Are Up at Some UC Campuses, Down at Others

Transfer Admission Rates for California Residents in Fall Term

	2002	2012	2022
Berkeley	32%	22%	25%
Los Angeles	33	28	25
Irvine	67	42	41
Santa Barbara	70	50	58
Davis	70	56	60
San Diego	61	42	61
Riverside	73	64	61
Santa Cruz	69	67	61
Merced	—	48	64

Under UC's referral policy, transfer applicants who meet systemwide eligibility requirements but are not admitted to their campus(es) of choice are redirected to the Merced, Riverside, and Santa Cruz campuses.

Transfer Applications to CSU Recently Started to Decrease

California Resident Transfer Students Applying, Admitted to, and Enrolling at CSU in Fall Term

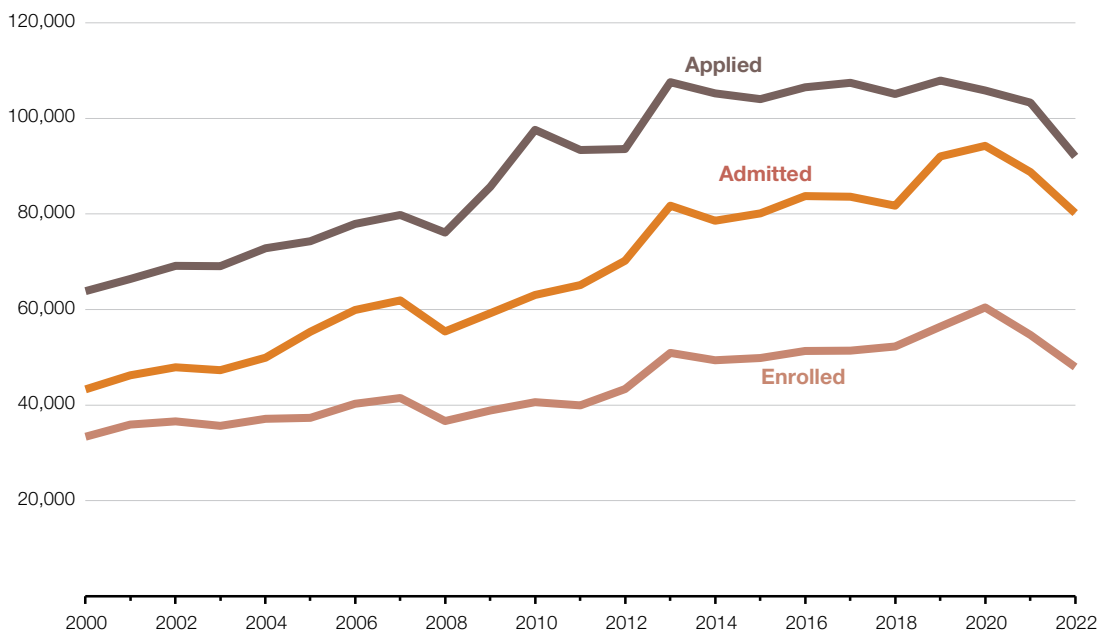


Figure includes students transferring from CCC as well as students transferring from other postsecondary institutions.

Transfer Admission Rates Are Increasing at Most CSU Campuses

Number of CSU Campuses by Fall Admission Rate for California Resident Transfer Students

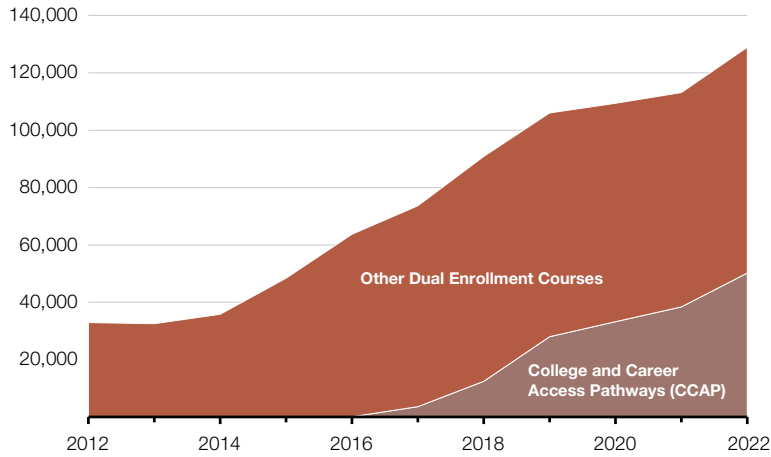
Admission Rate	2018	2019	2020	2021	2022
90% or more	—	2	4	5	1
75-90%	7	6	5	5	11
50-75%	10	6	10	9	8
Less than 50%	6	9	4	4	3
Totals	23	23	23	23	23

Key Issue

With the segments competing more intensely with one another for students, the Legislature is likely to face fundamental decisions about each segment's mission, including which programs and degrees each segment offers. As with enrollment growth decisions, these decisions could have important implications for the size and cost of each segment in the years to come.

CCC Has Seen Rapid Growth in Dual Enrollment

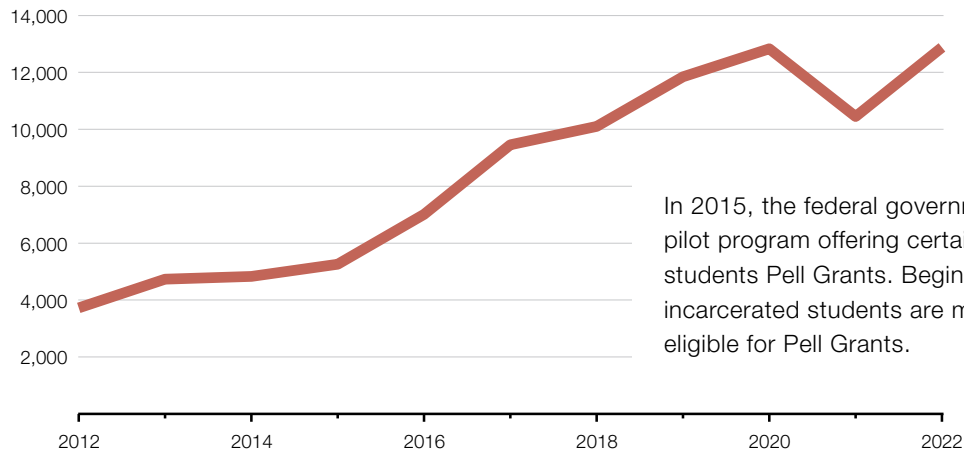
Fall Headcount of CCC Dual Enrollment Students



Although overall CCC enrollment has declined, enrollment has increased among certain student populations—including high school students dually enrolled in college courses. Since 2016, growth in dual enrollment has been due in large part to CCAP, a program that allows high school students to take college-level classes on a high school campus. As of fall 2022, dual enrollment students account for about 10 percent of total CCC headcount (and about 5 percent of total CCC full-time equivalent students).

CCC Is Also Serving More Incarcerated Students

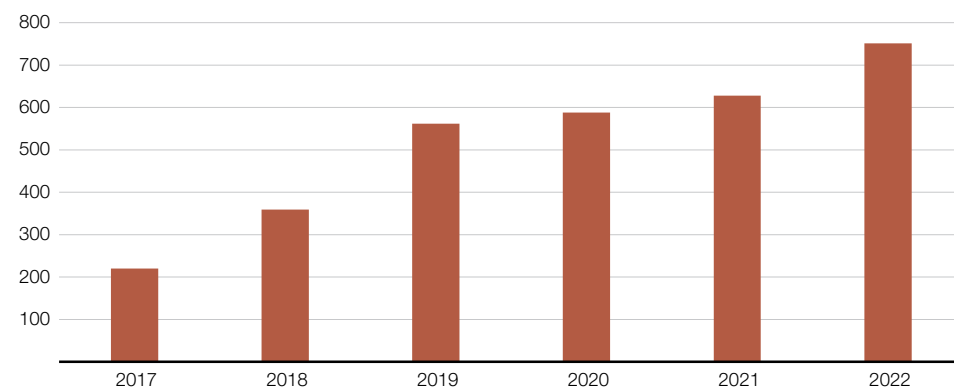
Fall Headcount of CCC Incarcerated Students



In 2015, the federal government created a pilot program offering certain incarcerated students Pell Grants. Beginning in July 2023, incarcerated students are more broadly eligible for Pell Grants.

Small but Growing Number of CCC Bachelor Degree Students

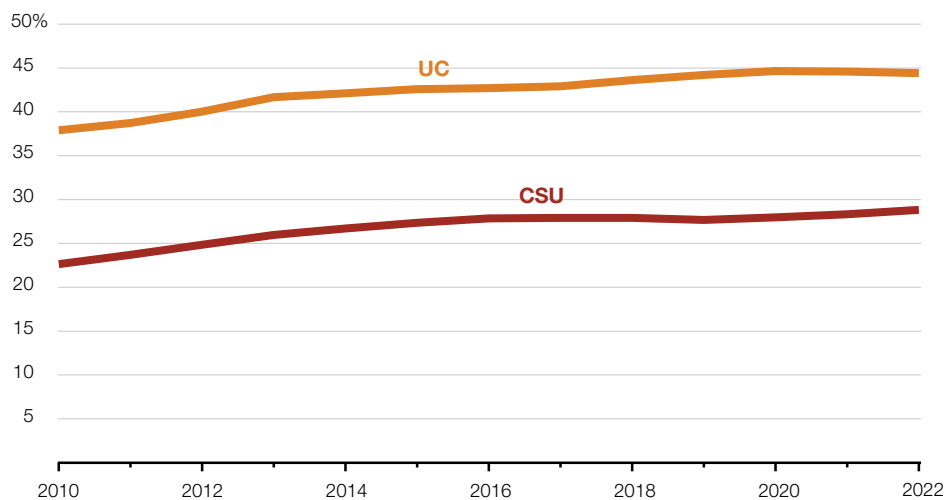
Fall Headcount in CCC Bachelor Degree Programs



Since 2016, 15 community colleges have offered certain bachelor's degree programs on a pilot basis. Beginning in 2022, state law authorizes CCC to add up to 30 additional bachelor's degree programs each year.

Share of University Students With STEM Majors Is Growing Gradually

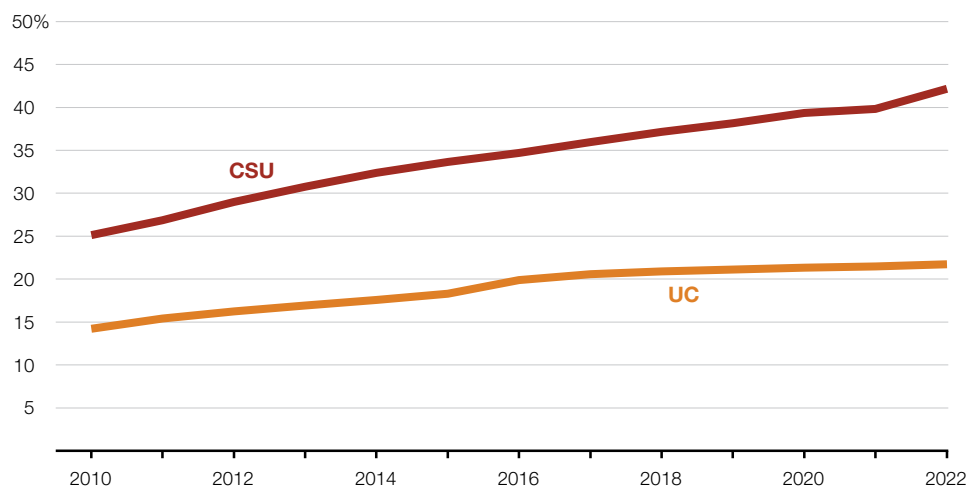
Percent of Undergraduates Enrolled in STEM Majors



STEM = science, technology, engineering, and mathematics.

Latinos Comprise a Growing Share of STEM Majors

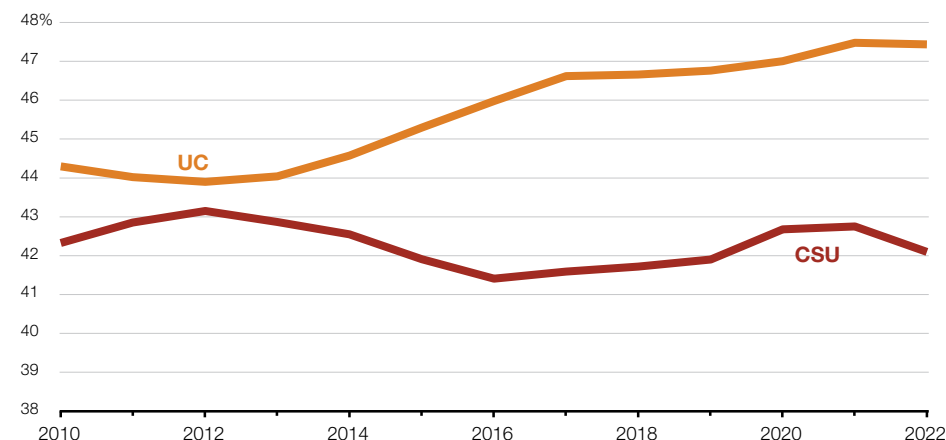
Percent of Undergraduate STEM Majors Who Are Latino



STEM = science, technology, engineering, and mathematics.

Share of STEM Majors Who Are Female Is Up at UC, Flat at CSU

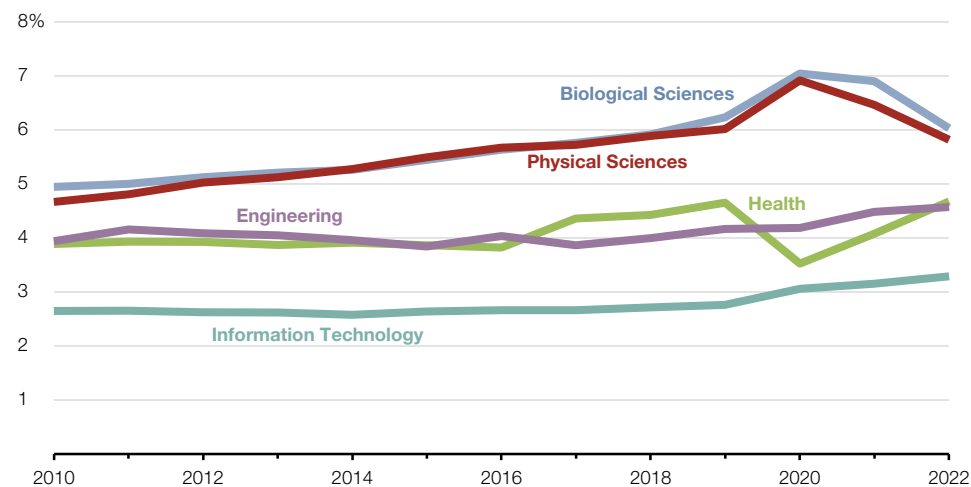
Percent of Undergraduate STEM Majors Who Are Female



STEM = science, technology, engineering, and mathematics.

Certain STEM Subjects Account for Growing Share of CCC Instruction

Percent of CCC Fall FTES in Certain STEM Subject Areas



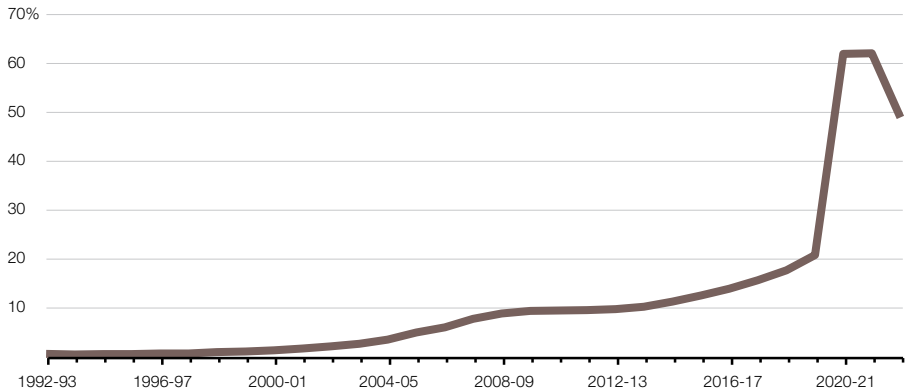
FTES = full-time equivalent students and STEM = science, technology, engineering, and mathematics.

Key Issue

The state's economy likely will continue to see growth in particular areas, such as health care, which in turn will have implications for the labor force and educational programs. Moving forward, the Legislature will face key decisions about how best to train workers in these areas.

CCC Online Instruction Remains Above Pre-Pandemic Levels

Percent of CCC Annual FTES Delivered Through Distance Education

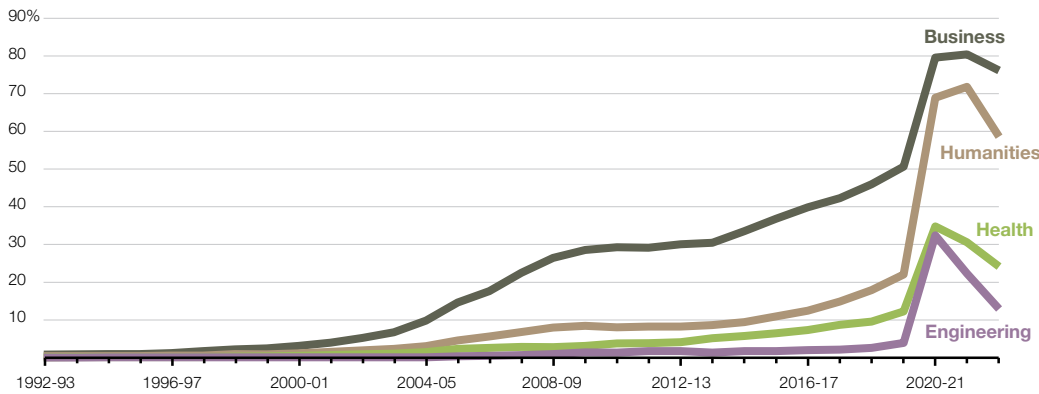


FTES = full-time equivalent students.

CCC classifies a course as "distance education" if at least 51 percent of instruction is delivered using distance education technology.

Growth in Online Instruction Varies Widely Across Subject Areas

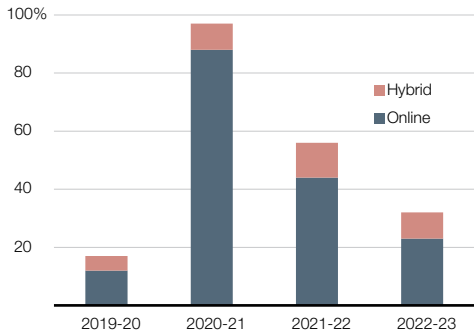
Percent of CCC Annual FTES Delivered Through Distance Education in Selected Subject Areas



FTES = full-time equivalent students.

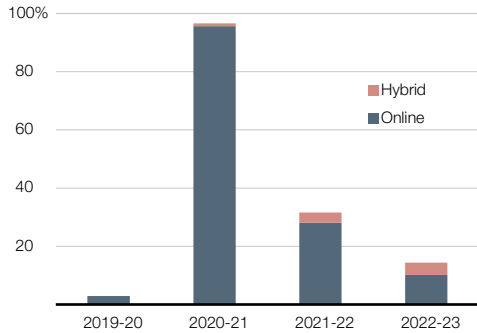
Online Instruction Also Remains Above Pre-Pandemic Levels at CSU...

Percent of CSU Credit Hours Taught in Online or Hybrid Courses



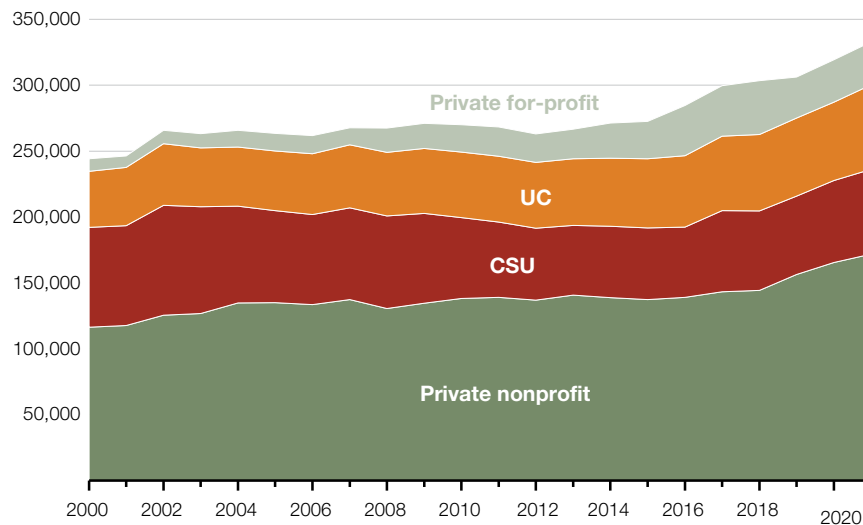
...And UC

Percent of UC Undergraduate Credit Hours Taught in Online or Hybrid Courses



More Than Half of California's Graduate Students Attend Private Institutions

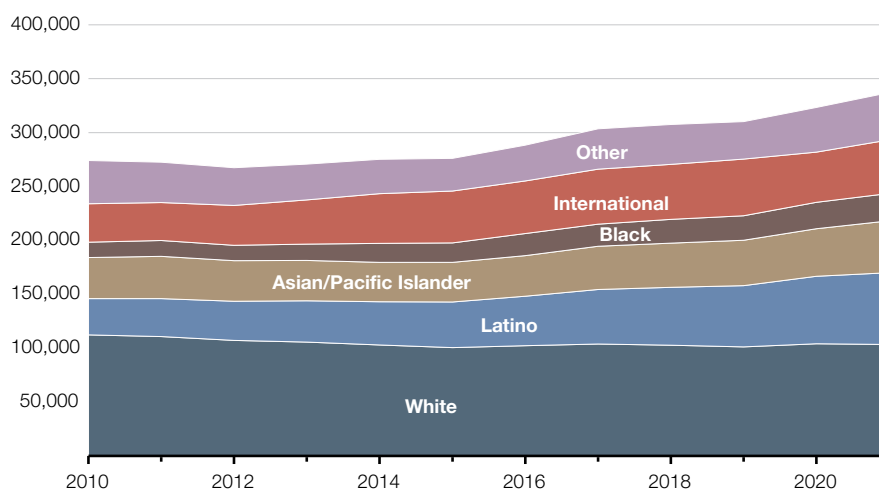
Graduate Fall Headcount by Segment



Over the past 20 years, the share of graduate students enrolled at CSU has fallen (from 31 percent to 19 percent), while the share enrolled at each of the other segments has increased.

Racial/Ethnic Diversity Is Increasing Among California's Graduate Students

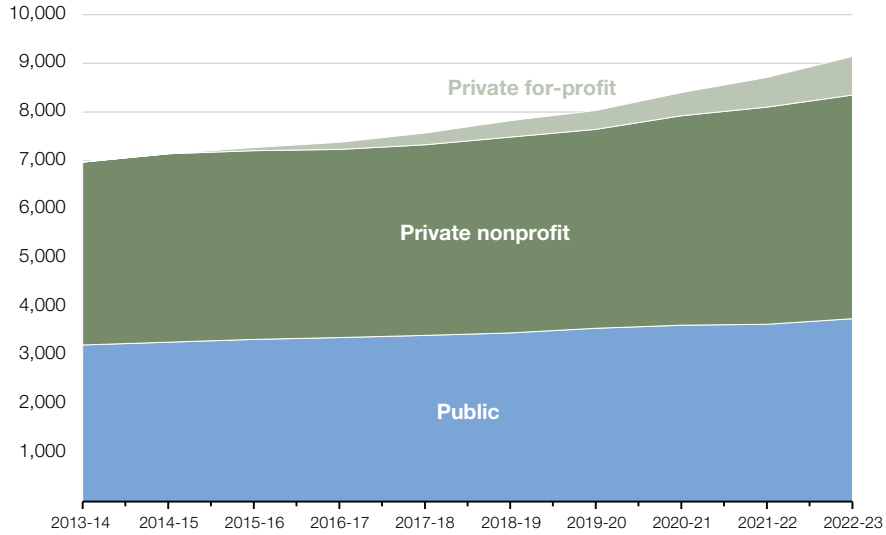
Graduate Fall Headcount by Race/Ethnicity



"Other" includes American Indian students, multiracial students, and students of unknown race/ethnicity.

Medical School Enrollment Is Growing

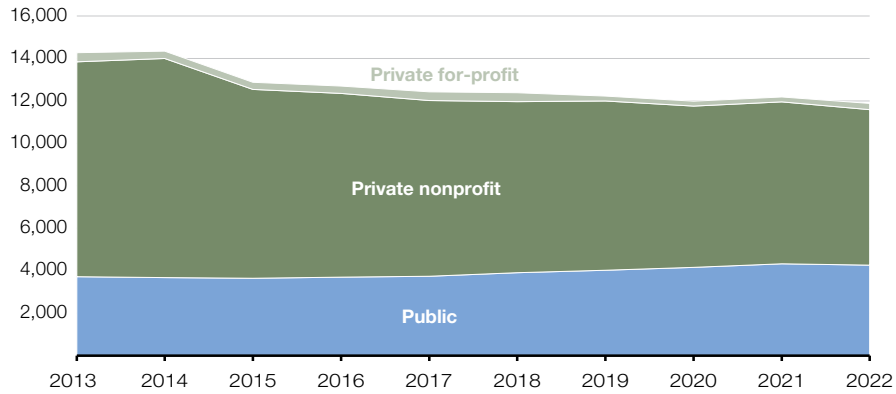
Headcount at California Medical Schools



Since 2015, four new private medical schools (two nonprofit and two for-profit) have opened in California.

Law School Enrollment Is Down

Fall J.D. Headcount at California's Nationally Accredited Law Schools



Since 2019, one of California's private nonprofit law schools has closed and two others have lost or withdrawn from accreditation by the American Bar Association.

J.D. = Juris Doctor.

LAO PUBLICATIONS

This report was prepared by Lisa Qing, with contributions from Ian Klein and Paul Steenhausen. It was designed by Vu Chu and reviewed by Jennifer Pacella. The Legislative Analyst's Office (LAO) is a nonpartisan office that provides fiscal and policy information and advice to the Legislature.

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