

Washington Public Enrollment Trends

Monitoring Fall Enrollment at Postsecondary Institutions Before, During, and After the COVID-19 Pandemic



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Foreword

This report sheds light on the enrollment trends of public institutions in Washington, including community and technical colleges and 4-year institutions. These institutions already share their enrollment data with the Education Research and Data Center (ERDC), which is included in the statewide longitudinal data system.

This report does not currently include enrollment trends for private institutions in Washington. Including enrollment data from private institutions in the state would provide a more comprehensive understanding of the educational landscape across all types of institutions.

In the future, as additional data become available to ERDC, this report may include an analysis of enrollment trends for other sectors. By incorporating this crucial data, we can better understand enrollment patterns for all students in the state and the dynamics that impact them.

Acknowledgements

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Introduction

Obtaining a postsecondary credential is critical to fulfilling the demand for a skilled workforce and advancing economic and social stability.

Washington has a goal that 70% of 25 to 44-year-olds in the state have a postsecondary credential. Additionally, the state aims to further racial equity by diminishing disparities in educational attainment between racial groups. Prior to the COVID-19 pandemic, 62% of Washington residents had obtained a postsecondary credential, and there are substantial disparities by race (*2022 Strategic Action Plan, 2022*). The COVID-19 pandemic caused further setbacks in attainment as Washington experienced large declines in enrollment at community and technical colleges (CTCs) and public 4-year institutions (see Box 1). Furthermore, the effects of the COVID-19 pandemic tended to disproportionately impact students who have been historically underserved by the higher education system including students of color, students from families with low incomes, and nontraditional students. To recover from losses related to COVID-19 and progress towards Washington's postsecondary credential attainment goals, the state must continue to monitor enrollment patterns and provide effective supports to ensure students can access postsecondary education and obtain credentials.

Nationally, the decline in postsecondary enrollment experienced during the pandemic appeared to slow by fall 2022. Overall undergraduate enrollment across all sectors declined by less than 1% in fall 2022 compared to fall 2021, much lower than the previous year's decline of about 4%.¹ Public 2-year institutions experienced a slight rebound in enrollment in fall 2022 (up about 0.4% from fall 2021), while public 4-year institutions saw a smaller decline of about 1% during the same period. Even though enrollment declines appear to be stabilizing at the national level, undergraduate enrollment is still down more than 7% overall since fall 2019 (*Current*

Box 1. The Impact of COVID-19 in Washington Findings from Previous Fall Enrollment Report

Unlike during previous economic downturns, increased unemployment and economic uncertainty during the COVID-19 pandemic were not met with increased postsecondary enrollment nationally or in Washington. In fact, postsecondary enrollment fell by more than 13% overall in the state.

Declines varied by student demographic characteristics across CTC and 4-year institutions. Postsecondary enrollment decline was largest for American Indian and Hispanic students at CTCs, and for white students at 4-year institutions. The decline for male students was larger than the decline for female students at both CTCs and 4-year institutions. Enrollment decline was significantly larger for older students (over age 25) than younger students (under age 25) at CTCs, while at 4-year institutions, younger students had a larger enrollment decline.

These differential impacts suggest that the early effects of the pandemic were not felt uniformly across subgroups, and it is imperative to continue to monitor enrollment trends in support of the state's goal to serve students equitably.

See previous Fall Enrollment Report [here](#).

¹ National data come from the National Student Clearinghouse (NSC) [dashboard](#). NSC provides the most timely national enrollment information; however, NSC enrollment estimates for Washington are less accurate for public 2-year institutions ([Spring 2023 Enrollment Estimates report](#)). Data on Washington's public institutions in this report come directly from administrative data and represent the most accurate data for Washington.

Term Enrollment Estimates - Fall 2022 Enrollment Overview, 2023). This amounts to over a million fewer undergraduate students enrolled across the country.

In Washington, public institutions have continued to experience relatively large declines in enrollment. Though like national trends, declines have slowed slightly from previous years since the beginning of the pandemic. Fall 2022 enrollment for undergraduate, degree- or certificate-seeking students at public CTC and 4-year institutions is down 4% and 3%, respectively, compared to fall 2021 enrollment. While still large, the decline is smaller than the 9% decline experienced at CTCs and consistent with the 3% decline experienced at public 4-year institutions in the previous year, and the even larger decline at the onset of the pandemic (Table 1). This suggests that the enrollment slump in the state is slowing, if not yet bouncing back to pre-pandemic levels.

Table 1. Fall enrollment decline has slowed somewhat for undergraduate students at public institutions in Washington.

Sector	Percent Change from Previous Year		
	Fall 2020	Fall 2021	Fall 2022
CTCs	-13%	-9%	-4%
Public 4-Years	-3%	-3%	-3%

In the aftermath of COVID-19, it is important to continue to monitor enrollment trends, particularly for those subgroups of students affected most heavily by the pandemic early on. This report provides greater detail on fall enrollment trends for undergraduate students at public institutions in Washington over the past decade, including variations by sector and differences across subgroups (see Box 2 and Box 3). The data can help identify potential issues in enrollment that may impact the state’s ability to meet its educational attainment goals if left unaddressed.

Box 2. Overall Enrollment Trends for Other Types of Students at Public Institutions

This report focuses primarily on degree-seeking undergraduates because they constitute about 70% of students in the higher education system. Additionally, Washington’s postsecondary attainment goals primarily focus on students who are seeking bachelor’s and associate degrees, certificates, apprenticeships, and other career-based credentials. However, about 30% of students at public higher education institutions in Washington do not fall into this category.

CTCs enrolled more than 30,000 students who were not seeking a degree or certificate in fall 2022 (about 25% of all CTC enrollments) in adult basic education, job skills, or continuing education. Like degree-seeking CTC students, enrollment for these students dropped 25% between fall 2019 and fall 2022. However, enrollment rebounded considerably for this group; between fall 2021 and fall 2022 enrollment increased about 20%.

More than 25,000 graduate students enrolled in public 4-year institutions in fall 2022 (accounting for about 20% of degree-seeking student enrollment). Unlike undergraduate enrollment at 4-year institutions which fell during the pandemic, graduate student enrollment increased by 6% between fall 2019 and fall 2022.

See Appendices A and B for more detail.

Box 3. Examining Sector Differences in Washington

Numerous differences exist between the sectors that can impact enrollment patterns warranting a distinct examination. First, CTCs tend to have fewer barriers for admission. They generally have open enrollment policies and lower costs of tuition making CTCs more accessible to students. Second, while CTCs offer baccalaureate degrees, most students enroll in programs that take approximately two years to complete, such as associate degree programs or certificate programs, or attend CTCs with the intention of transferring to 4-year institutions to complete their bachelor’s degree. CTCs also offer proportionally more ‘hands on’ technical programs, which were severely impacted by the pandemic since they do not convert easily (or in some cases at all) to online delivery. These programs also serve proportionally more students receiving need-based aid, students of color, and older students, so that impacted the declines in those groups early in the pandemic. As the pandemic restrictions eased, those programs, and those groups, have recovered at a more rapid rate than others. Finally, student demographics can differ across the sectors (Table 2). Given these differences in institutional structure and student backgrounds, students attending CTCs and 4-year institutions likely faced different challenges during the pandemic that could result in different enrollment patterns during and after the pandemic. Given the potential differences, this report examines enrollment trends by sector separately.

Table 2. Student characteristics at Washington public institutions differ by sector (Fall 2022 undergraduate degree-seeking students).

Characteristics	4-year	CTC
Amer. Ind./Alaska Nat.	0.4%	0.8%
Asian	11.4%	10.2%
Black	3.5%	7.3%
Latino	13.5%	10.6%
Nat. Haw./Other Pac. Isl.	1.0%	0.7%
White	48.8%	45.1%
Multiracial	13.1%	16.5%
Race not reported	8.3%	8.7%
Male	45.4%	45.3%
Female	54.6%	54.7%
Full-time	90.5%	53.0%
Part-time	9.5%	47.0%
WA resident	80.8%	93.7%
Under 25	88.9%	53.0%
Age 25+	11.1%	46.9%
Receiving need-based aid*	38.0%	40.7%

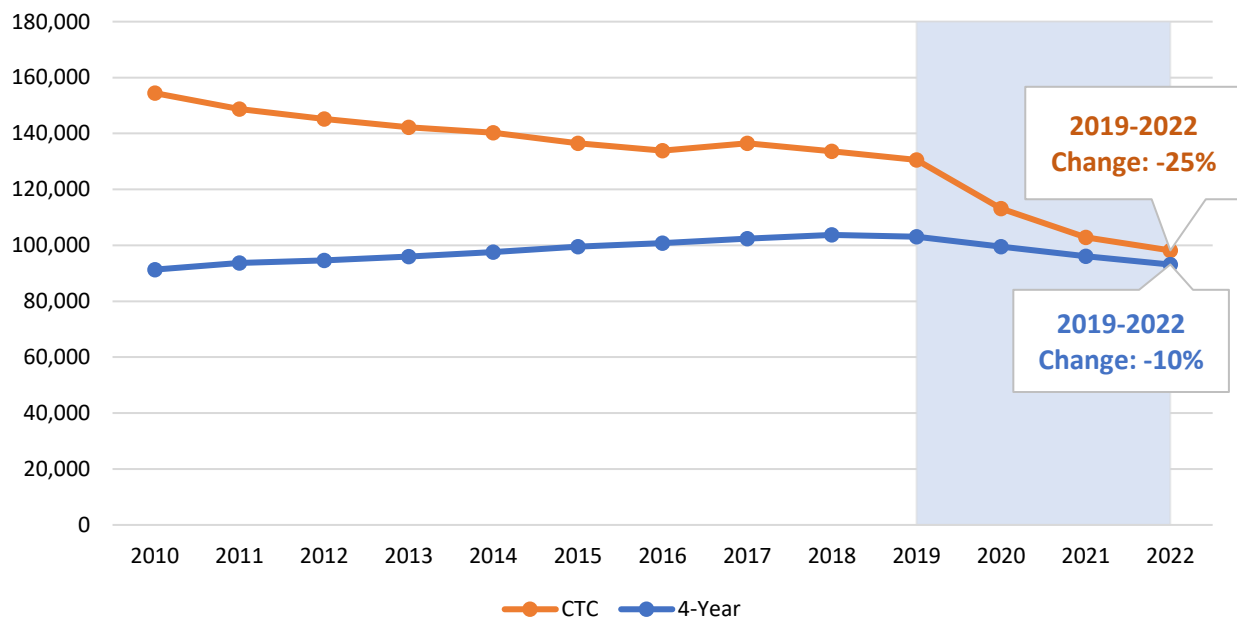
*Note: Percentage of students receiving need-based aid for 4-year institutions is reported for fall 2021 because fall 2022 data were not available at the time of analysis. CTC percent of students who are economically disadvantaged, included here as receiving need-based aid, come from fall 2022 data. For fall 2021, 28% of students at CTCs were economically disadvantaged; however, this year appears to be an outlier. In all other years, between 33% and 41% of CTC students fell into this category.

Recent Trends in Fall Enrollment at Public Institutions in Washington

Overall, undergraduate fall enrollment at public institutions in Washington fell more than 20% between fall 2010 and fall 2022, but a majority of the decline occurred during the pandemic. Prior to the pandemic years, changes in fall enrollment ranged from -1% to +2% per year, falling about 5% overall between fall 2010 and fall 2019. Between fall 2019 and fall 2022, enrollment fell 18%.

Enrollment declines during the pandemic have been much more severe at CTCs than at public 4-year institutions. At 4-year institutions, overall undergraduate enrollment has dropped by about 3% each year between fall 2019 and fall 2022, resulting in an overall 10% drop between fall 2019 and fall 2022.² CTC enrollment, on the other hand, dropped 25% between fall 2019 and fall 2022 (Figure 1).

Figure 1. Enrollment at public institutions in Washington has continued to drop since the COVID-19 pandemic began.



Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated undergraduate fall headcount and State Board for Community and Technical Colleges (SBCTC), Washington public CTC unduplicated fall headcount

Note: Some students might be concurrently enrolled in a CTC and a 4-year institution during the fall term of the same year. These students will be included in both the CTC and 4-year fall enrollment counts.

² Enrollment fell at most 4-year institutions around the time of the pandemic, with the exception of the University of Washington where the number of students enrolled remained relatively constant since fall 2018. Note, however, even this lack of growth represents a shift in University of Washington’s enrollment pattern as enrollments had been increasing by 2-3% annually between fall 2010 and fall 2019. The Evergreen State College experienced year-over-year declines in enrollment in most years between 2010 and 2022 with sharp declines in enrollment immediately prior to and during the pandemic, though enrollment increased slightly between fall 2021 and fall 2022. Eastern Washington University also experienced a slight decline in annual enrollment immediately prior to the pandemic with larger declines during the pandemic. Central and Western Washington Universities and Washington State University had increasing enrollment preceding the pandemic with enrollments declining during the pandemic.

Enrollment Trends by Student Subgroup

Student needs, expectations, and barriers related to postsecondary education can differ considerably resulting in variation in enrollment trends across student groups. Further examination of enrollment trends by student characteristics demonstrates differences across income level, racial group, gender, and age group. Understanding these differences can help identify opportunities to address barriers for student subgroups that could help bolster equitable enrollment efforts in the future.

Have students who require financial assistance been disproportionately impacted?

The COVID-19 pandemic had substantial consequences for the economic, social, and technological environment of students attending postsecondary institutions. Early pandemic years brought increased unemployment and financial strain. Colleges also shifted toward remote operations that could have exacerbated barriers to postsecondary attainment faced by prospective students with low incomes. These changes, along with the rising costs of college, have led many to question the value of a postsecondary education, with younger people and those without postsecondary degrees expressing the most skepticism about the value of a college degree (Schleifer et al., 2022). At the same time, in the 2020-21 academic year, Washington expanded access to financial assistance for students with low incomes by implementing the Washington College Grant (WCG, formerly the State Need Grant). These circumstances can drive different enrollment patterns for students with low incomes.³

Enrollment trends of Washington resident students receiving financial assistance differed considerably between CTCs and 4-year institutions during the pandemic.⁴ The number of students at 4-year institutions who received financial assistance increased by 13% between fall 2019 and fall 2020 (see Box 4). The number of students enrolled who did not receive financial assistance fell by 11% in the same time period (Figure 2). These diverging trends suggest that the WCG expansion might have helped to offset the negative impacts of the COVID-19 pandemic by increasing the number of students who have access to aid. Enrollment for those receiving financial aid fell 3% between fall 2020 and fall 2021 but is 10% higher than in fall 2019. Fall 2022 financial aid data for 4-year institutions was not available at the time of analysis.

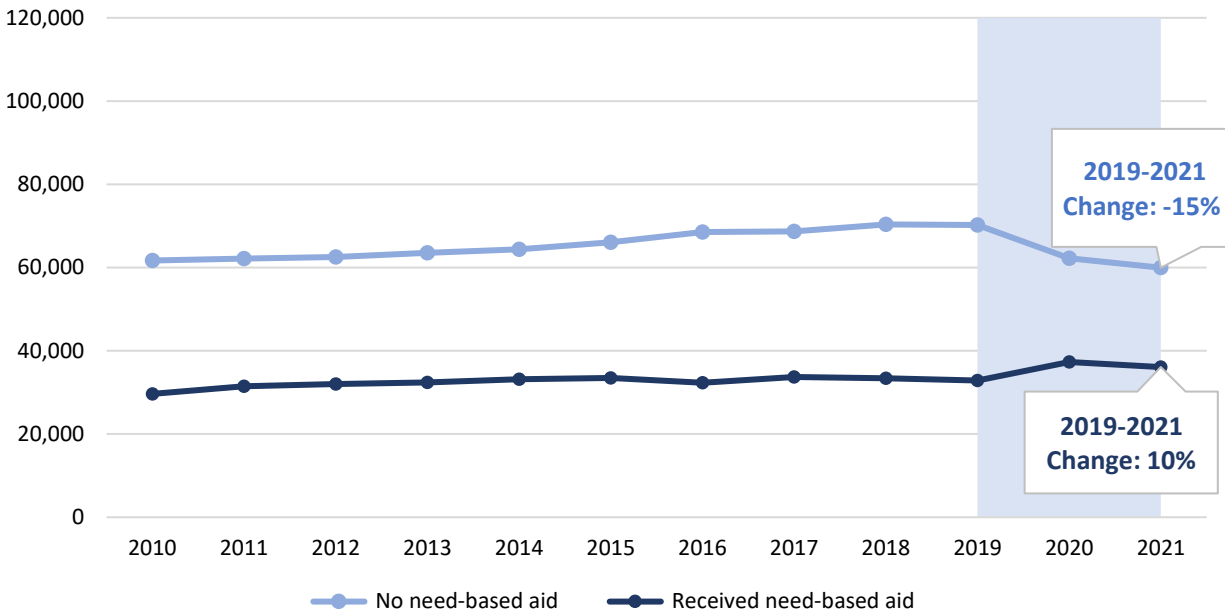
Box 4. WCG recipients at 4-year institutions

The increase in enrollment for financial aid recipients at 4-year institutions is driven entirely by an increase in the number of enrollees who receive the WCG. Enrollment for WCG increased by about 25% between fall 2019 and fall 2021. At the same time, the number of enrolled students who received the federal Pell Grant fell by 14%.

³ Because the WCG is the largest aid program in the state and is only available to Washington resident students, this section provides enrollment trends for Washington resident students only.

⁴ Data on financial aid receipt comes directly from the 4-year institutions and CTCs and data availability differs slightly across the two data sources. Due to data availability, this report defines financial assistance or financial aid at 4-year institutions as receiving the WCG or the Pell Grant only. This definition excludes all other need-based aid such as institutional grants or Washington's College Bound Scholarship. At CTCs, financial assistance refers to students identified as economically disadvantaged in the CTC data system, which includes students receiving any need-based financial aid or waivers or who are enrolled in Workfirst, Basic Food Employment Training, or Displaced Homemaker programs (see <https://www.sbctc.edu/resources/documents/colleges-staff/data-services/data-warehouse/student.pdf>).

Figure 2. During the pandemic, there was an increase in students who received need-based aid and a decrease in students who did not receive need-based aid at 4-year institutions.

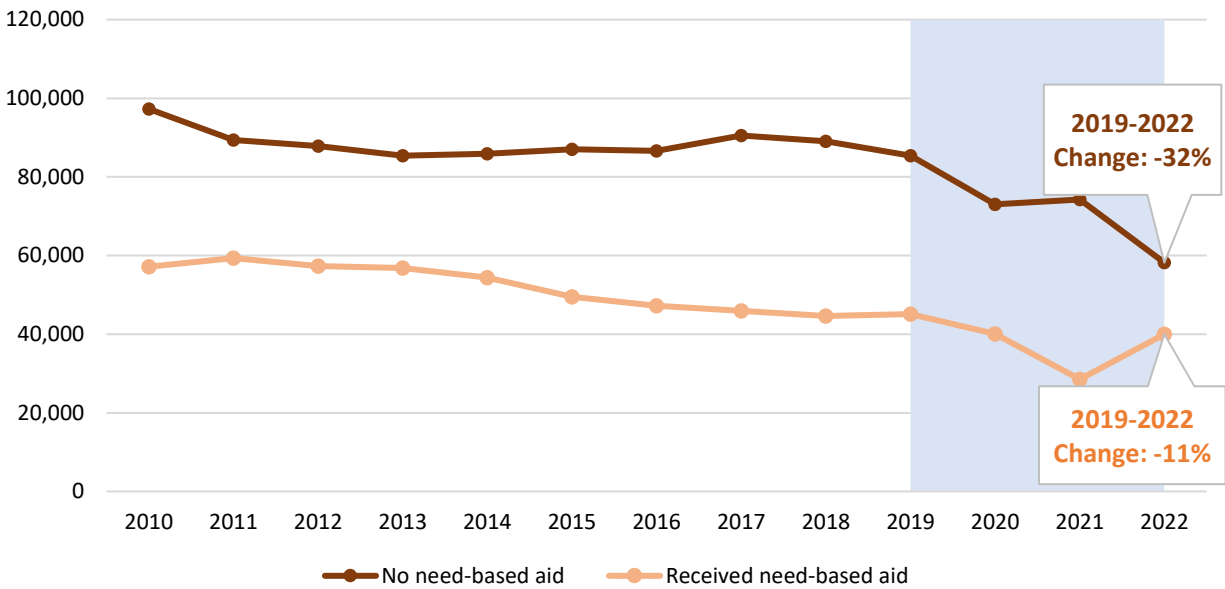


Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, undergraduate fall headcount by need-based aid receipt

In contrast to trends for financial aid recipients at 4-years, enrollment at CTCs for students receiving financial assistance fell 11% between fall 2019 and fall 2020 and an additional 29% between fall 2020 and fall 2021. Enrollments for this group have appeared to rebound substantially, increasing by 40% between fall 2021 and fall 2022. Between fall 2019 and fall 2022, enrollment fell more for those students who did not receive financial assistance (32% decline) compared to those who did receive financial assistance (11% decline) (Figure 3). Thus, the WCG expansion might have averted the larger declines in enrollment experienced by students did not receive financial assistance.⁵

⁵ Data from SBCTC do not allow for disaggregating the types of aid received. Additional data is needed to determine if enrollment of WCG recipients increased at CTCs.

Figure 3. During the pandemic, enrollment at CTCs declined more starkly for students who did not receive need-based aid.



Source: State Board for Community and Technical Colleges, Washington public CTC unduplicated, undergraduate fall headcount by need-based aid receipt

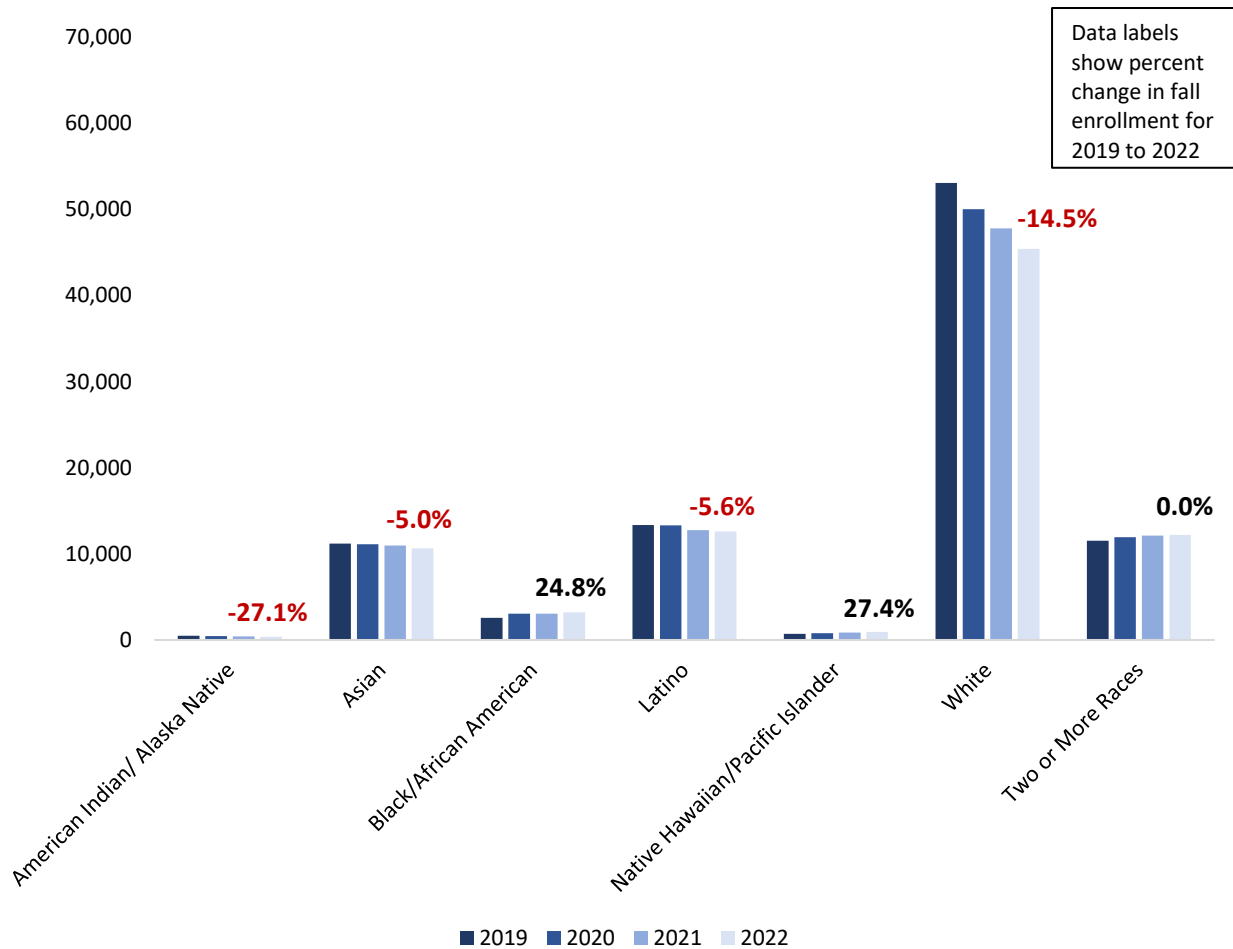
Overall, enrollment for students receiving financial aid increased at 4-year institutions and fell at CTCs between fall 2019 and fall 2022, though the decline was much smaller than for those students who did not receive financial assistance. Importantly, there are at least two ways the enrollment of students receiving financial assistance could increase (or decline more slowly) relative to those who do not receive aid. First, students who were eligible to receive aid might be more likely to enroll in college during this time period. Second, the economic downturn and the WCG expansion increased the number of students who were eligible for aid. These newly eligible students might have enrolled regardless of their aid eligibility, or they might enroll in college because of the change in aid eligibility. Further research is needed to determine the reasons behind the observed enrollment patterns for students receiving financial aid.

How have trends in student enrollment changed across racial groups?

Changes in undergraduate enrollment have varied across racial groups. At public 4-year institutions, the COVID-19 pandemic tended to reverse enrollment growth trends for some groups and exacerbate declines for others. The number of students who identify as Asian, Hispanic/Latino, Native Hawaiian and Pacific Islander (NH/PI), and multiracial increased between 2010 and 2019, but growth fell or slowed for these groups during the pandemic years.⁶ Enrollments declined for American Indian and Alaska Native (AI/AN), Black, and white students between fall 2010 and fall 2019. These declines persisted for white and AI/AN students between fall 2019 and fall 2022 and reversed for Black students for whom enrollment increased by 25% (Figure 4).

⁶ It is important to note that shifts in enrollment numbers across racial groups can reflect changes in the enrollment rate as well as demographic shifts in the population and changes in how students identify.

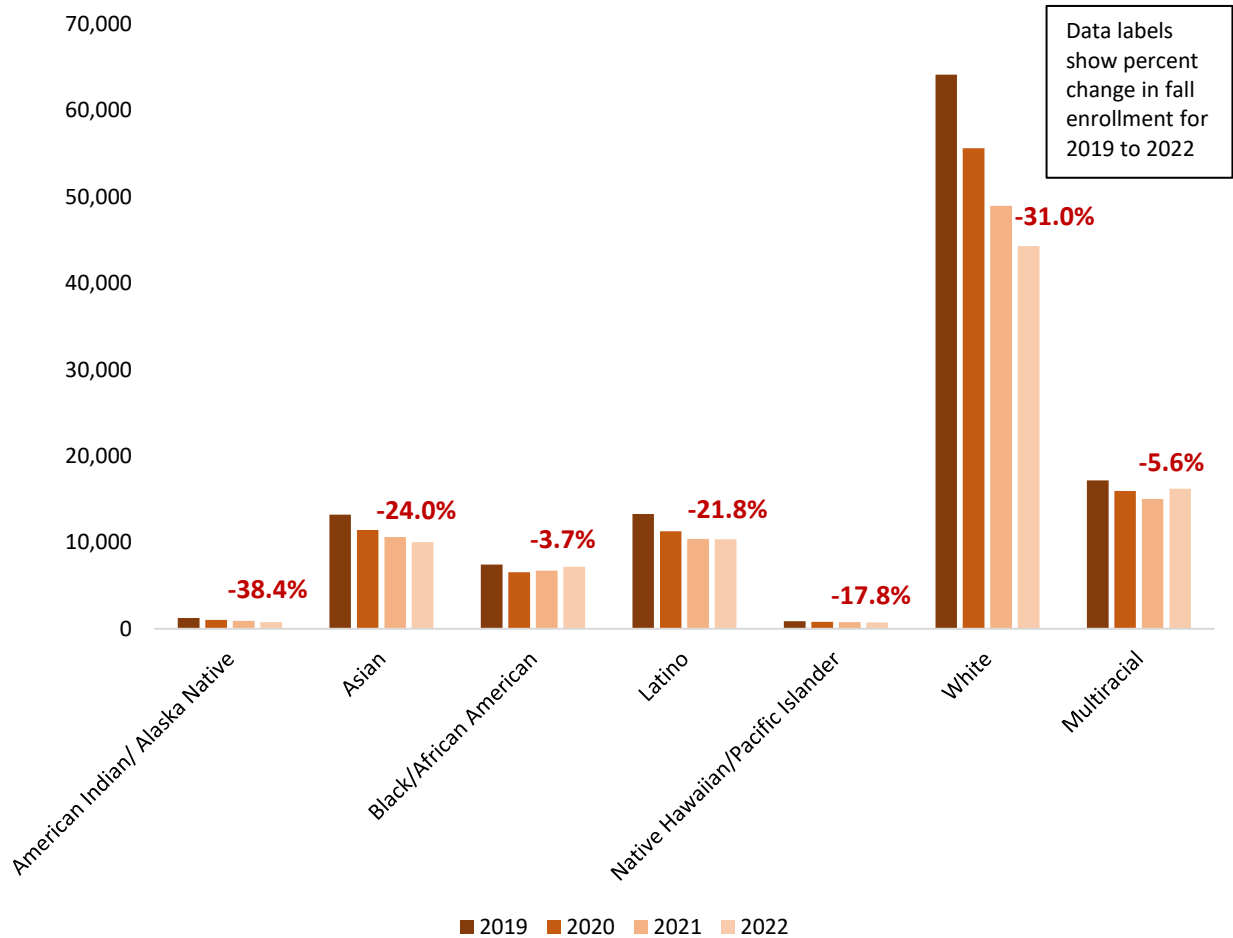
Figure 4. At public 4-year institutions, enrollment declined most for American Indian/Alaska Native students and white students during the pandemic, while enrollment increased most for Native Hawaiian/Pacific Islander and Black/African American students.



Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, undergraduate fall headcount by race

At CTCs, enrollments fell for most racial groups between fall 2010 and fall 2019, and the decline continued to accelerate during the pandemic years. For some groups, enrollment declines that began at the beginning of the pandemic appear to have slowed or rebounded slightly in the last year. For instance, enrollment increased 7-8% for Black and multiracial students between fall 2021 and fall 2022 after falling 10% and 13%, respectively, between fall 2019 and fall 2021. Hispanic/Latino student enrollment remained stable over the last year after falling 22% between fall 2019 and fall 2021 (Figure 5).

Figure 5. At CTCs, enrollment declined for all racial groups during the pandemic, with the largest drops among American Indian/Alaska Native students, white students, and Asian students.



Source: State Board for Community and Technical Colleges, Washington public CTC unduplicated, undergraduate fall headcount by race

These trends have led to a substantial shift in the racial distribution of students between 2010 and 2022. The share of CTC enrollees who are Latino and Black increased by 2 percentage points while the proportion who identify as multiracial increased by 10 percentage points. At 4-year institutions, the proportion of students who are multiracial and Hispanic/Latino more than doubled between 2010 and 2022, increasing by 9 and 7 percentage points, respectively. At the same time, at both 4-year institutions and CTCs, white students comprise less than 50% of enrollees in fall 2022 compared to more than 60% in fall 2010. Notably, this change in the racial distribution likely reflects changes in the racial distribution of college-aged individuals as well as changes in who enrolls.⁷

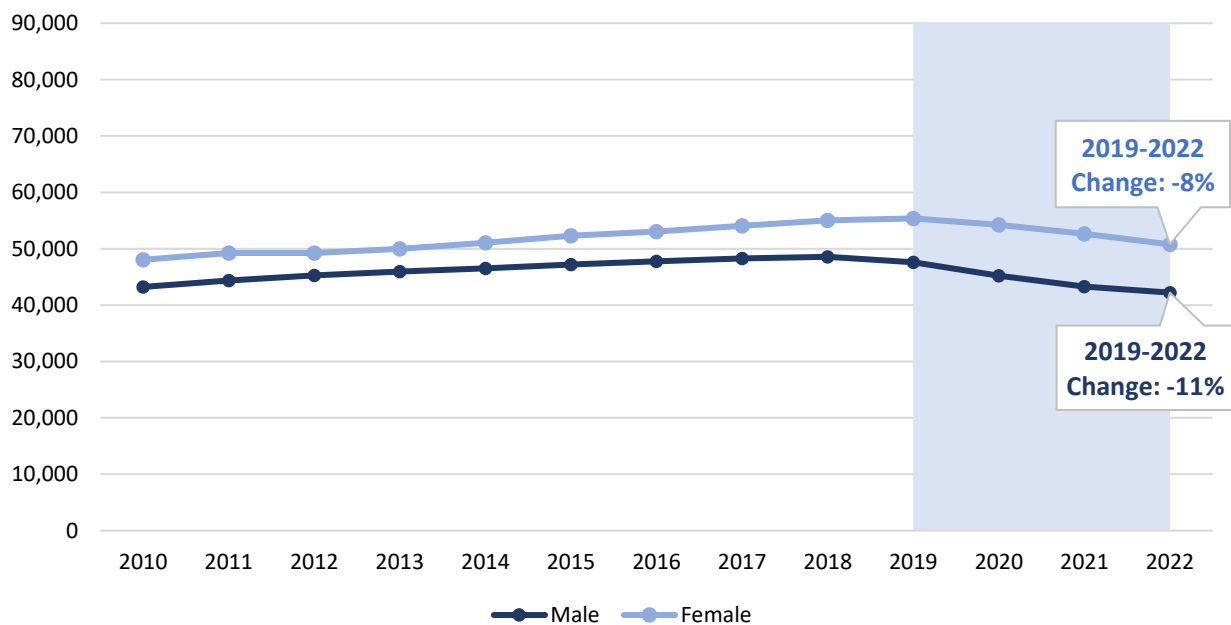
⁷ For example, Kwakye and Lacalli (2022) show that students of color made up about 40% of Washington’s public K-12 student population in 2010 and now make up more than 50% of students.

Trends by racial group vary further when considering intersections with other student characteristics. For example, while the number of enrolled resident students who received need-based aid increased 12% at 4-year institutions between fall 2019 and fall 2021, Black resident students receiving need-based aid had the largest increase of 41% while white students receiving need-based aid had a much smaller increase of 8%. Similarly, at CTCs the overall number of economically disadvantaged resident students declined between fall 2019 and fall 2022; however, enrollments increased for economically disadvantaged Asian, Black, NH/PI, and multiracial students and declined for white, Hispanic/Latino, and AI/AN students. Greater exploration of the intersection across student characteristics can provide important information about where to direct resources. See Appendix C for more detail.

Are there differences in fall enrollment trends by gender?

At both 4-year and CTCs, female students comprise more than 50% of enrolled students.⁸ Female students have outnumbered male students in higher education for several years, and the pandemic may have exacerbated the gender disparity in the state. Enrollment declines during the pandemic were larger for male students at both public 4-year institutions and CTCs in Washington. At public 4-year institutions, male enrollment fell by 11% between fall 2019 and fall 2022 compared to 8% for female students (Figure 6). Like the pattern at 4-year institutions, male enrollment at CTCs declined at a slightly higher rate (down by 28%) than female students (down by 25%) (Figure 7).

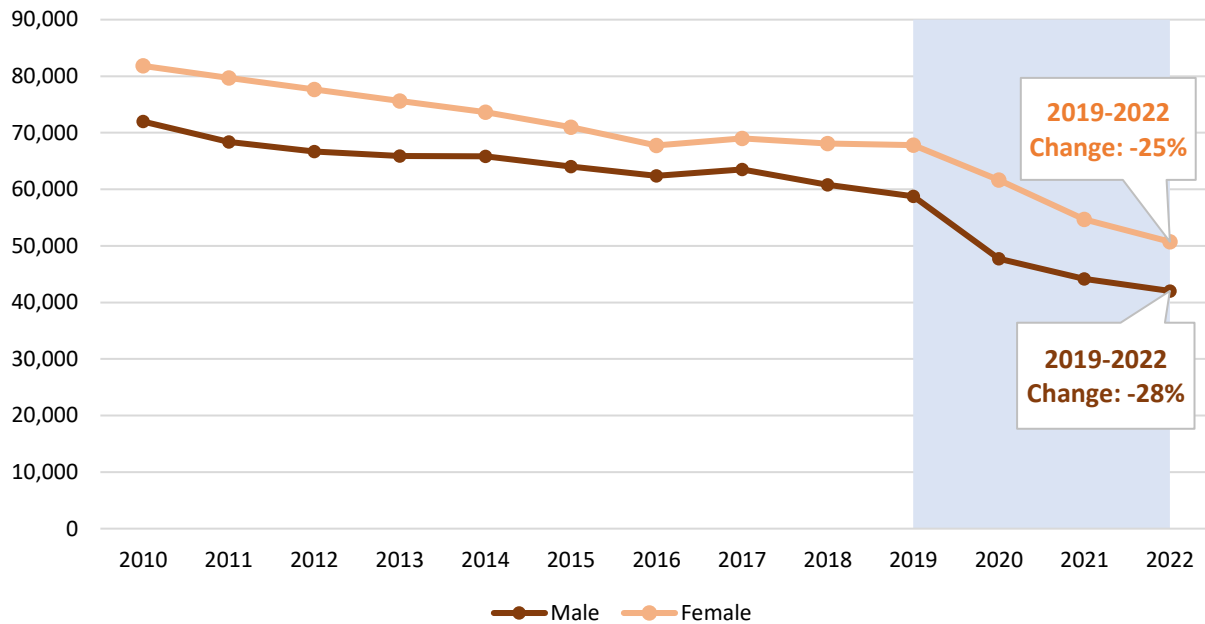
Figure 6. Enrollment decline for male students at public 4-year institutions was greater than enrollment decline for female students during the pandemic.



Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, undergraduate fall headcount by gender
 Note: Gender values for Sex X and Unknown are not shown in this figure.

⁸ Colleges and universities have also started collecting nonbinary and/or unknown gender data. These samples are not included in Figure 6 and Figure 7 because the data are currently too small to report.

Figure 7. Enrollment decline for male students at CTCs was greater than enrollment decline for female students during the pandemic.



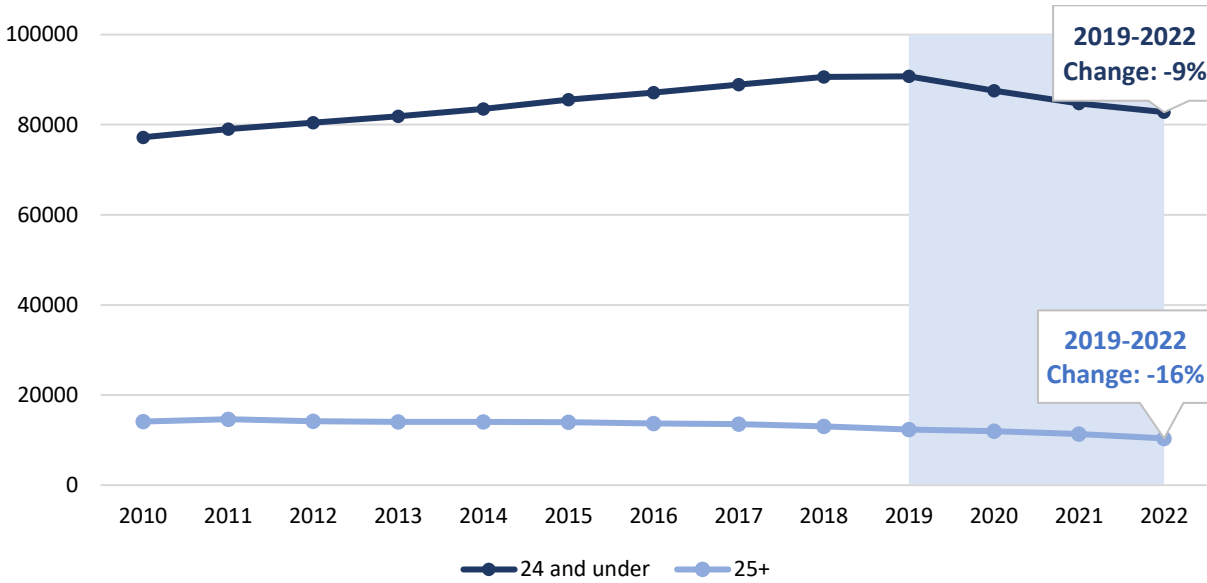
Source: State Board for Community and Technical Colleges, Washington public CTC unduplicated, undergraduate fall headcount by gender

Enrollment patterns by gender persist across student characteristics. For example, female students of color or those receiving need-based aid have experienced increased enrollment or smaller declines compared to their male counterparts. The trends in enrollment by gender mirror those seen at the national level. During the pandemic between 2019 and 2021, the decrease in undergraduate enrollment was considerably larger for male students than female students—a decline of about 10% compared to about 7%, respectively. Public CTCs saw an even more significant enrollment decline for male students (about 19%) than female students (13%) (*Current Term Enrollment Estimates - Fall 2022 Enrollment Overview*, 2023). One potential reason for the larger decline among male students at CTCs could be the difficulty in transitioning from hands-on training programs, which are often dominated by male students, to virtual settings during in-person school closures (Mangan, 2022). Additional research is needed to determine the reasons for ongoing drop in male enrollment that has intensified during the pandemic years.

Are there differences in fall enrollment trends by age?

Students of different ages have different motivations for pursuing postsecondary education, and historically, economic conditions have a particularly strong influence on fluctuations in adult student enrollment. However, enrollment patterns during and following the COVID-19 pandemic have not led to increases in adult enrollment. At 4-year institutions, enrollment of older students (those 25 and over) has been declining since 2011. On the other hand, between 2011 and 2019, enrollment was increasing for younger students (those under 25). Between fall 2019 and fall 2021 during the pandemic, both age groups experienced similar declines. In fall 2022, however, enrollment declined more sharply for older students than younger students (8% compared to 2%) (Figure 8).

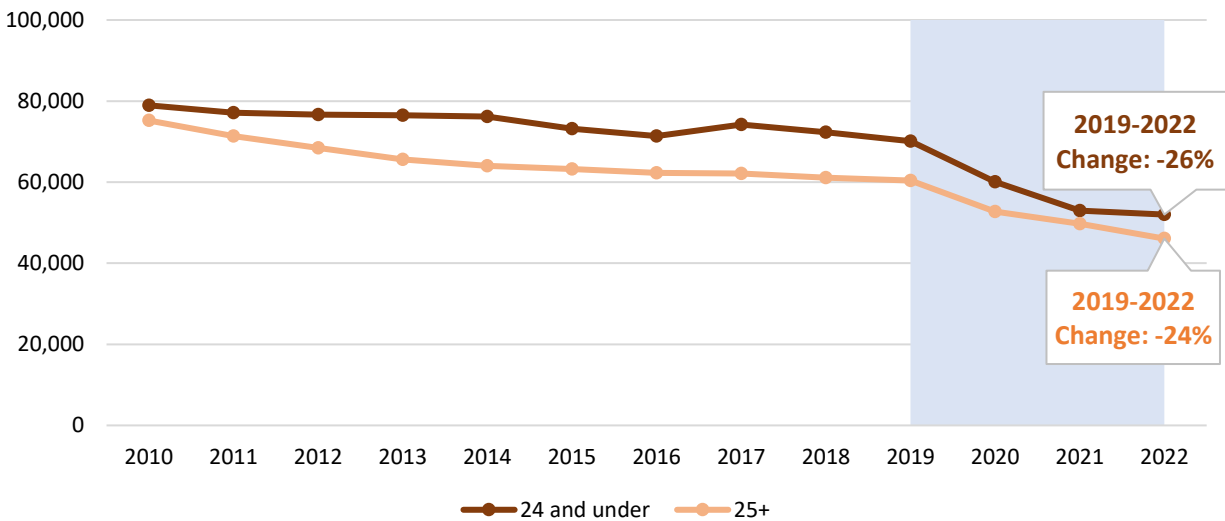
Figure 8. During the pandemic, enrollment declined more for students over age 25 at public 4-year institutions.



Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, undergraduate fall headcount by age

In contrast to public 4-years, CTCs have seen similar declines by age group during the pandemic years; younger and older student enrollment declined by about 24% and 26%, respectively. This trend differs from enrollment trends prior to the pandemic where enrollment of younger students dropped by 11% between fall 2010 and fall 2019 compared to 20% for older students during the same time period (Figure 9).

Figure 9. At CTCs, enrollment declined at similar rates during the pandemic for older and younger students, with a slightly larger decline among younger students.



Source: State Board for Community and Technical Colleges, Washington public CTC unduplicated, undergraduate fall headcount by age

Historically, economic downturns and times of higher unemployment rates have spurred adults to look towards higher education to upskill and reskill to strengthen their position in the workforce. However, the nature of the COVID-19 crisis and recession has been different from previous economic downturns, and enrollment trends have diverged from historical patterns such as during the Great Recession. Continuing to unpack enrollment trends among different age groups of students is crucial to helping policymakers respond to the continued impact of the COVID-19 pandemic on postsecondary enrollment and to provide postsecondary opportunities to students to prepare them for the workforce.

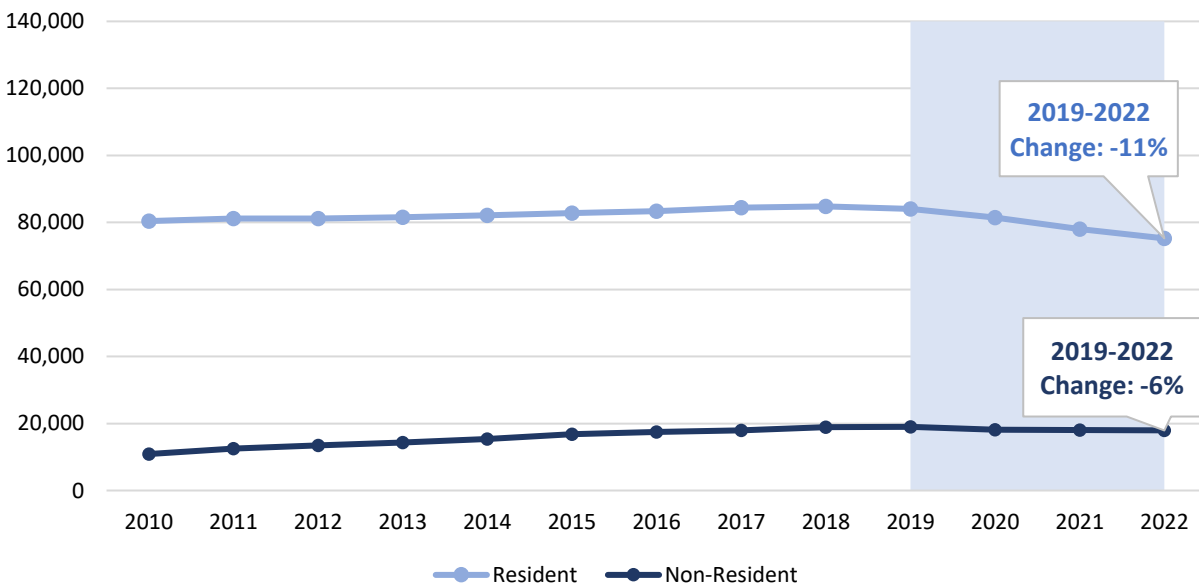
Enrollment Trends by Other Characteristics

In addition to examining enrollment trends by students’ demographic characteristics, it is also valuable to look at how enrollment trends differ by other characteristics to understand variations across student type. This section presents enrollment trends by residency status and enrollment intensity, as well as trends among first-year students and transfer students.

Are there differences in fall enrollment trends by state residency?

The majority of students at public institutions in the state are Washington residents, despite differences between sectors and some fluctuations over time. At 4-year institutions, the proportion of students who are residents has decreased over time, from about 88% of enrollees in fall 2010 to 81% in fall 2022. Resident enrollment dropped by 3% between fall 2019 and fall 2020 and continued to drop by 4% annually in each subsequent year. Non-resident enrollment, on the other hand, saw a pronounced drop at the beginning of the pandemic but has since stabilized. Between 2019 and 2022, enrollment declined at nearly double the rate among residents than non-residents at 4-year institutions (11% compared to 6%, respectively) (Figure 10).

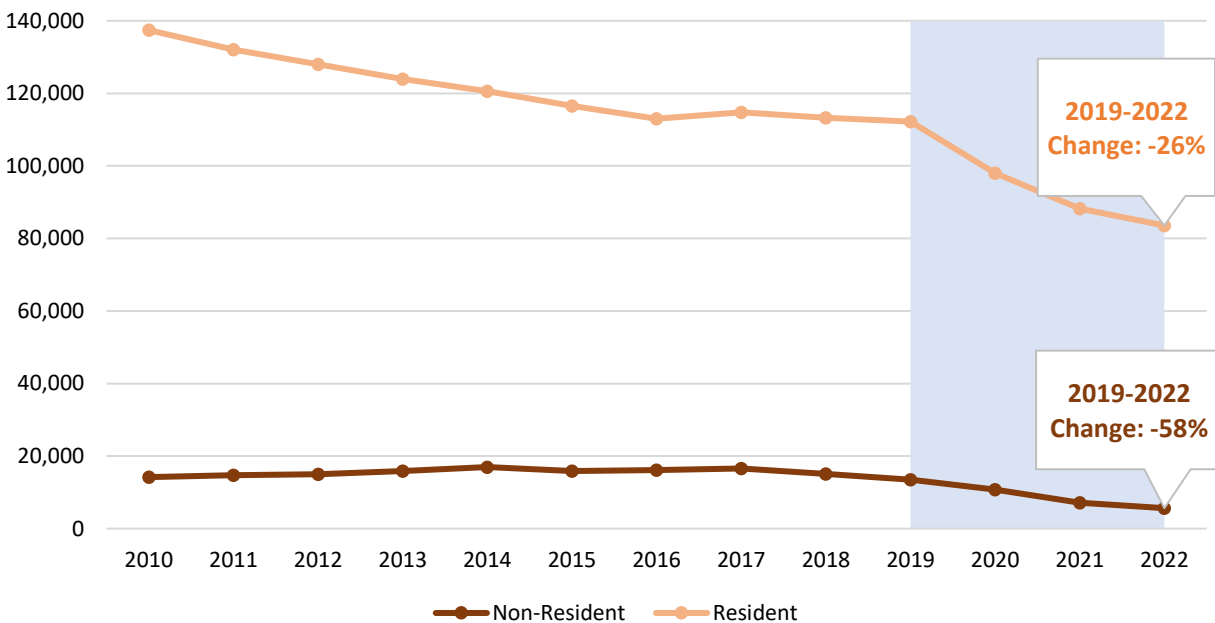
Figure 10. At public 4-year institutions, resident students saw larger enrollment declines during the pandemic.



Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, undergraduate fall headcount by Washington State residency status

Conversely, at CTCs, the share of students who are Washington residents increased slightly over time from 91% in fall 2010 to 94% in fall 2022. Enrollment for nonresident students at CTCs declined more significantly than enrollment for residents between fall 2019 and fall 2022 (58% compared to 26%, respectively) (Figure 11). It is worth noting that nonresident students make up only a small minority of students at CTCs (approximately 6% of degree or certificate seeking students), and about 20% of students at public 4-years.

Figure 11. At CTCs, enrollment decline was larger for non-residents during the pandemic, although they make up a small portion of the student population.



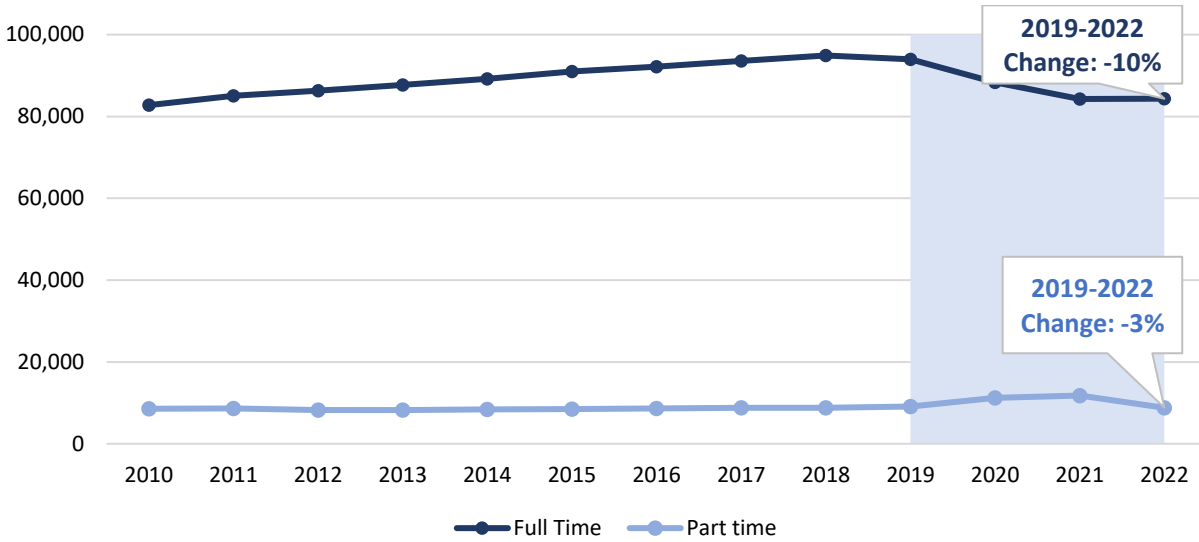
Source: State Board for Community and Technical Colleges, Washington public CTC unduplicated, undergraduate fall headcount by Washington State residency status

Students’ residency status determines their tuition price at public institutions, with residents paying less for tuition than non-residents. While enrollment declines may have encouraged institutions to recruit and admit more out-of-state students to increase their revenue stream, data indicates that enrollment declined for both residents and non-residents alike during the pandemic.

Are there differences in fall enrollment trends by students’ enrollment intensity?

The number of students enrolling full-time in the fall quarter at 4-year institutions increased in most years between 2010 and 2019 but started declining between fall 2018 and fall 2019 prior to the pandemic. During the pandemic years, the number of students enrolling full time dropped 10% between fall 2019 and fall 2022. Part-time enrollment increased substantially early in the pandemic, jumping 30% between fall 2019 and fall 2021 before dropping 25% between fall 2021 and fall 2022. Overall, part-time enrollment fell 3% between fall 2019 and fall 2022, while full-time enrollment declined by 10% during the same period (Figure 12).

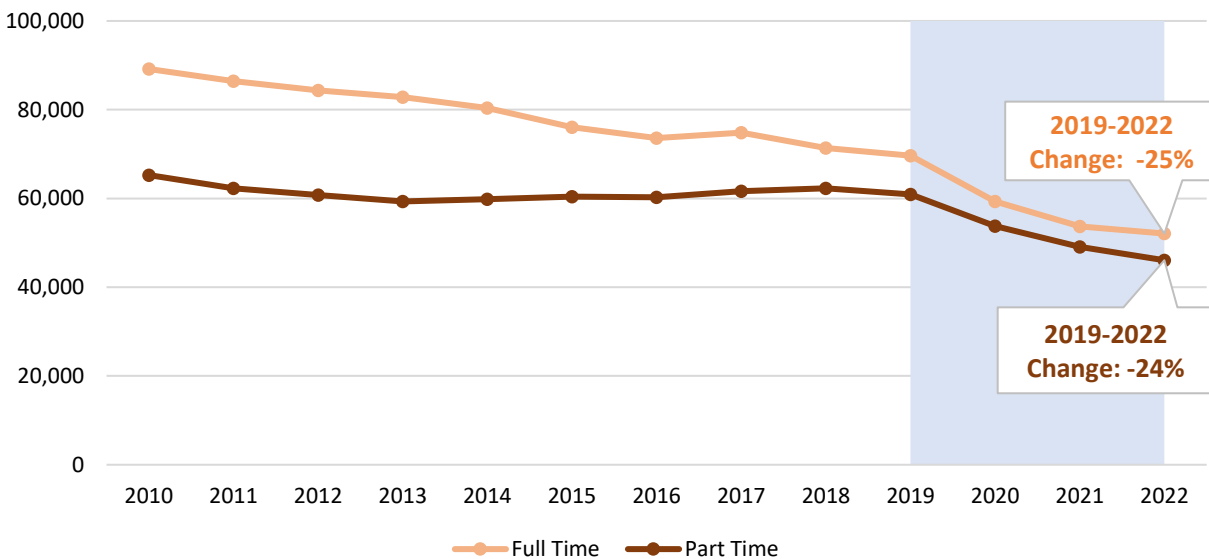
Figure 12. Enrollment declined more for full-time students than part-time students at public 4-years during the pandemic.



Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, undergraduate fall headcount by enrollment intensity

At CTCs, full-time enrollment was declining while part-time enrollment was more stable in the decade before the pandemic. However, since the onset of the pandemic, full- and part-time enrollment trends have not differed noticeably, resulting in overall declines in enrollment of 25% and 24%, respectively, between fall 2019 and fall 2022 (Figure 13).

Figure 13. At CTCs, enrollment declined at similar rates for full-time and part-time students during the pandemic.



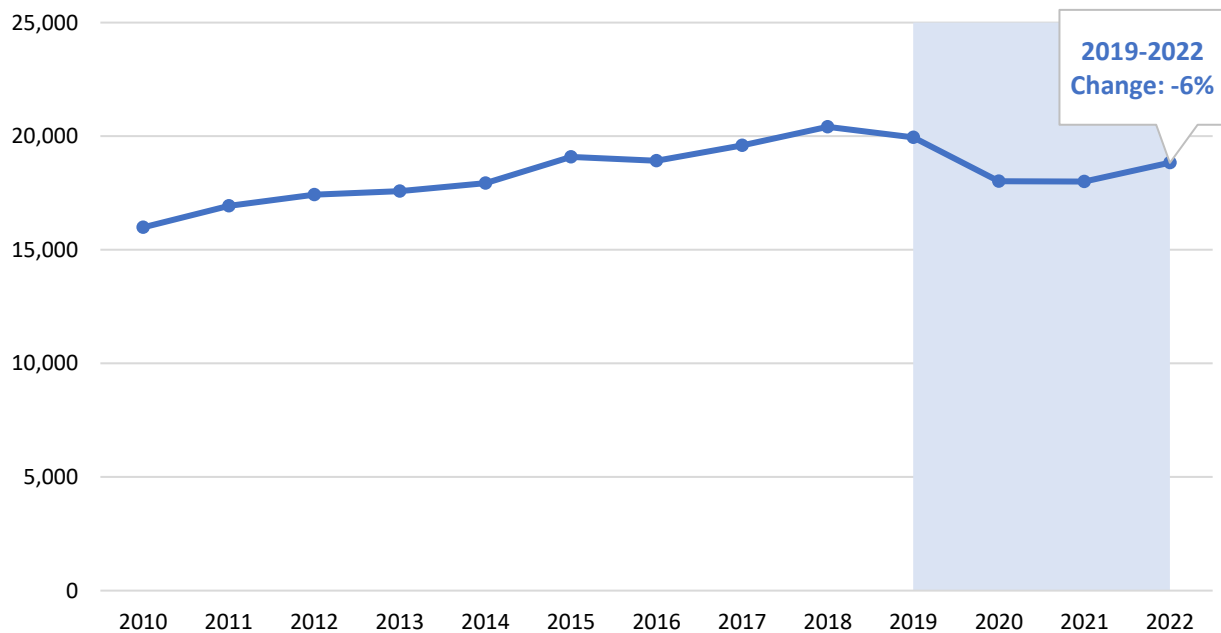
Source: State Board for Community and Technical Colleges, Washington public CTC unduplicated, undergraduate fall headcount by enrollment intensity

The trend at public 4-year institutions suggests that some full-time students may have switched to part-time during the pandemic, while others left college entirely or chose not to enroll full-time in the first place. Because part-time enrollment then returned to pre-pandemic levels and full-time enrollment continued to decline, it may be that students who enrolled part-time during the pandemic either completed their education or left instead of returning to full-time status. At CTCs, however, there were more part-time students to begin with, and their enrollment decline was similar to students who were enrolled full time.

How has enrollment changed for students enrolling for the first time?

First-year students are those who are enrolling in postsecondary education for the first time. This analysis excludes students who are currently enrolled in the Running Start program or other concurrent enrollment programs. Examining first-year enrollment provides a sense of how many new students are enrolling in postsecondary education in the state. Even before 2020, undergraduate enrollment for first-year students at public 4-year institutions in Washington was declining, but the drop was even greater at the onset of the pandemic. However, the decline was minimal in 2021 and enrollment increased for first-year students in 2022. Overall, though, first-year student enrollment declined by 6% between fall 2019 and 2022 at public 4-year institutions (Figure 14).

Figure 14. Overall, first-year enrollment has declined at public 4-year institutions during the pandemic.

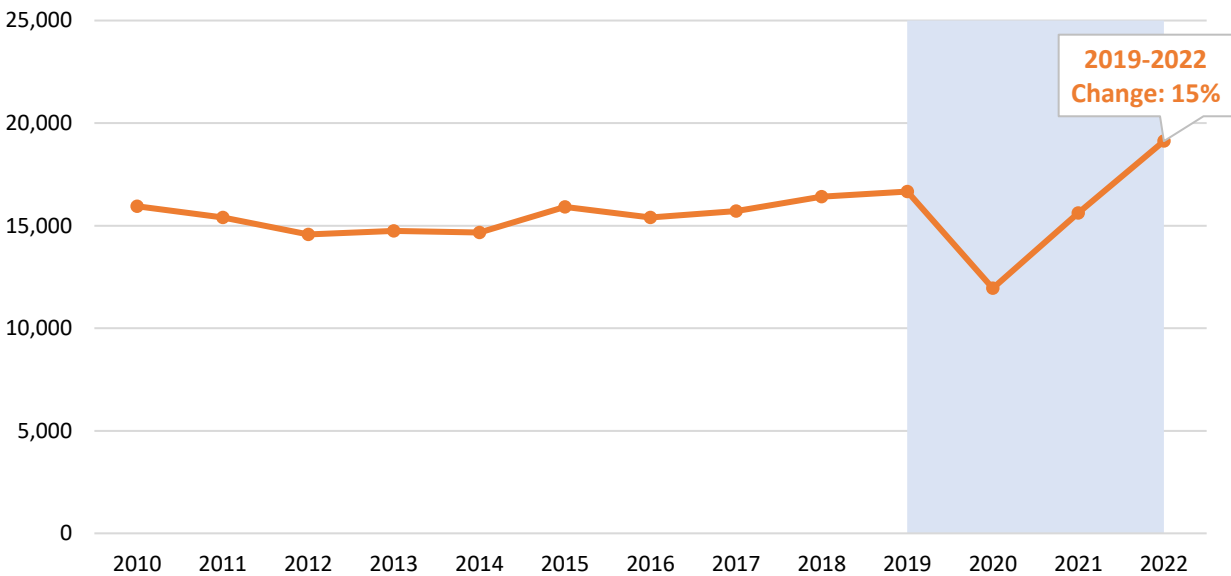


Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, undergraduate fall headcount for first year students

Note: Running Start students are excluded from the counts of first-year students.

Prior to the pandemic, first-year enrollment at CTCs was steadily rising. However, the onset of the pandemic led to a sharp decline, and first-year enrollment dropped by 28% in 2020 compared to 2019. Enrollment for first-year students has since rebounded, though, with substantial gains in 2021 and 2022, leading to an overall 15% increase in first-year enrollment compared to before the pandemic (Figure 15).

Figure 15. Overall, first-year enrollment has increased at CTCs during the pandemic.



Source: State Board for Community and Technical Colleges, Washington public CTC unduplicated, undergraduate fall headcount for first year students

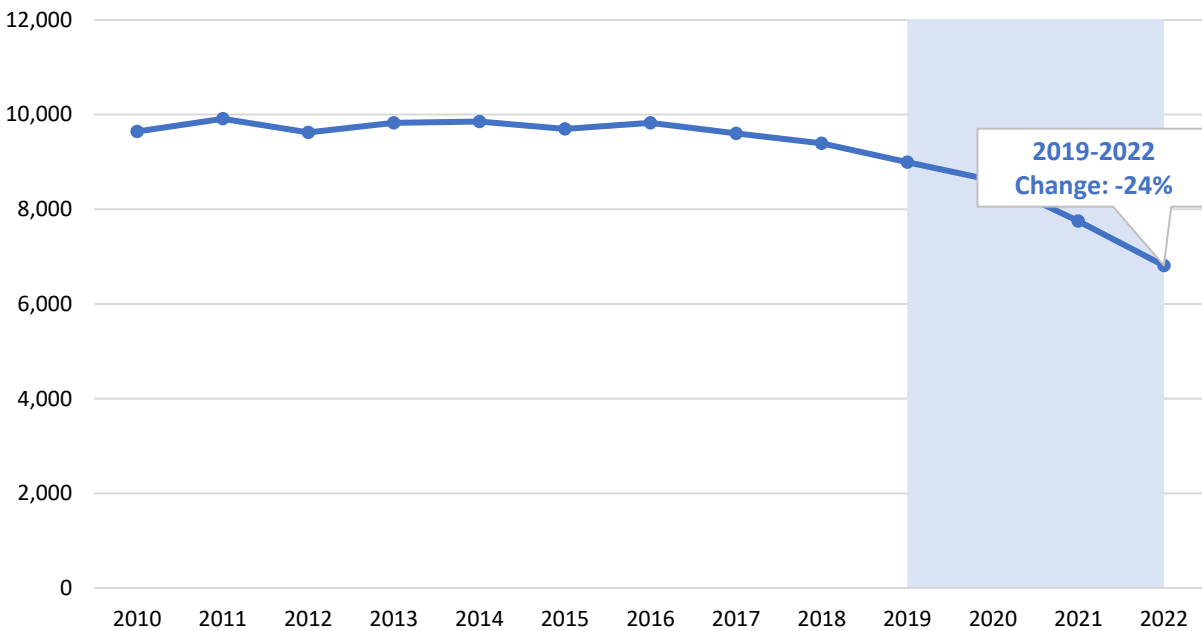
Note: Running Start students are excluded from the counts of first-time students.

First-year enrollment at public 4-year institutions in Washington has declined in the years since the onset of the pandemic, but it has increased at CTCs. This could be a result of students and families prioritizing the affordability and proximity to home offered by CTCs during the pandemic. It will be important to continue to monitor this trend and whether students transfer to 4-year institutions.

How has enrollment changed for transfer students?

Transferring from a CTC to 4-year institution can be an affordable and accessible option for students to obtain a bachelor’s degree because CTCs tend to have open enrollment and lower tuition. However, there are many hurdles that students must overcome to successfully transfer, and data suggests that many students who intend to transfer to a 4-year from a CTC never do (*Washington Transfer Equity Project 2023, 2023*). In this analysis, a transfer student is defined as one who is new at a 4-year institution who was previously enrolled after high school as a student at a different postsecondary institution. This may include transfer from a CTC or a different 4-year institution. The number of students who had transferred into a public 4-year institution, either from a different 4-year institution or a CTC, declined more rapidly than enrollment overall at 4-year institutions. Between fall 2019 and fall 2022, transfer enrollment dropped by 24%, which is considerably larger than the decline in overall enrollment during the same period (Figure 16).

Figure 16. The number of transfer students at public 4-year institutions has decreased since before the pandemic.



Source: Education Research Data Center (ERDC), Washington public 4-year institutions unduplicated, fall headcount for new transfer students

The decline in transfer student enrollments may reflect a drop in the transfer rate and also a drop in the number of students at CTCs or other institutions from which students transfer. Continuing to ease transfer requirements could offer an accessible pathway to bachelor’s degrees for more Washington students and may increase enrollment. Further research is needed to determine why transfer student enrollment declined during the pandemic and how to best support students who are transferring.

Discussion

Examining enrollment over time at Washington’s public institutions reveals several important trends. First, public institutions continue to experience declines in enrollment that largely began at the onset of the pandemic. Trends have appeared to stabilize or rebound for some students, but enrollment remains down relative to pre-pandemic levels. Importantly, enrollment patterns differed across sectors, with CTCs generally experiencing greater declines than 4-year institutions. Sectors tend to serve different students and have different cost and organizational structures that likely pertain to differences in enrollment. For example, CTCs tend to enroll more part-time students who might be working or supporting families. Part-time students might be more likely to stay enrolled if provided with flexible course offerings, such as asynchronous courses or childcare to stay enrolled than full-time students. Thus, strategies to increase enrollment should reflect the differences across these sectors. Understanding the differences in enrollment trends and students’ needs is critical to providing necessary resources to supports.

Second, the composition of those enrolled in public institutions is changing. There tend to be more students of color in the college-aged population and more students of color enrolling in college.

Disparities still exist, however, and people of color tended to experience more negative effects from the pandemic. Strategies to maintain and increase enrollment will need to focus on barriers experienced by students of color. Similarly, male enrollment fell more steeply during the pandemic than female enrollment. Some research has highlighted the need for targeted strategies to support male students, specifically male students of color (Mangan, 2022).

Third, Washington increased financial aid availability substantially by making the Washington College Grant an entitlement and increasing the income eligibility threshold. Increasing need-based financial aid is an effective strategy for increasing postsecondary enrollment and degree receipt (Dynarski, 2003; Bettinger, 2015; Castleman and Long, 2016; Denning, Marx, and Turner, 2019). Further research can help determine the effect of the Washington College Grant expansion on enrollment, but early evidence suggests that strengthening Washington's financial aid program by expanding the Washington College Grant helped students from families with low incomes enroll in postsecondary education during the pandemic.

Finally, the decline in fall enrollment numbers can be due to declines in initial enrollment, increases in dropout or stop-out, or both. Indeed, trends suggest that first-year college student enrollment has declined more slowly or rebounded since the onset of the pandemic contrary to the overall enrollment trends suggesting a potential drop in persistence or retention rather than first time enrollment. Increasing the number of students enrolled in college requires boosting enrollment and ensuring that students stay enrolled. Importantly, the economic, health, and social benefits of a postsecondary education are largest for those who complete their degrees (Ma and Pender, 2023). Thus, strategies to boost enrollment should be accompanied by strategies to ensure that students persist and graduate with a credential so they might realize the full potential of a college education.

Observed trends and prior research suggest some strategies that could help improve enrollment at public institutions. Incorporating evidence-based strategies to build on existing state efforts, like the Washington College Grant, can make postsecondary education more accessible. For instance, supporting students and families through the procedural barriers can ease the transition to college. While financial aid can help offset the costs of postsecondary education, applying for aid can be confusing and time-consuming. Providing personalized financial aid application assistance alongside tax filing has been shown to increase enrollment among high school seniors and recent graduates (Bettinger et al., 2012). A number of ongoing statewide initiatives provide financial aid application assistance to students and families, and WSAC continues to learn how to best increase financial aid access and awareness (*Knowledge Is Power*, 2023).

Removing barriers to admissions could also help boost enrollment. For example, Idaho's direct admissions program provides guaranteed admission for Idaho students who meet certain academic criteria. Preliminary evidence suggests that the program can increase direct enrollment among high school graduates (Odle & Delaney, 2022). A similar program has been adopted for select students in Washington. In Fall 2022, five of the state's public 4-year institutions launched a Guaranteed Admissions Program for students who meet academic requirements in participating school districts. The program is meant to increase access and credential completion in the state, particularly for students who may not have considered going to college, and further research could determine whether these programs can

help curb the enrollment decline seen in recent years (*Participating Washington Public Four-Year Universities Launch Guaranteed Admissions Program, 2022*).

Once enrolled, providing students with holistic academic and wraparound supports can help them stay enrolled and earn a credential. The CUNY ASAP program demonstrated the effectiveness of providing students with both academic and non-academic supports, like frequent advising, transportation stipends, and textbook vouchers. Students in the program were twice as likely to graduate with an associate degree than their peers (Scrivener et al., 2015). The program has been replicated successfully on other campuses and may be particularly important for helping students with lower incomes persist through to graduation.

Continuing to monitor enrollment trends and examine evidence-based practices can help explain why enrollment continues to decline in Washington and identify the most effective strategies to improve postsecondary enrollment and attainment.

Conclusion

This report details enrollment patterns at Washington public institutions. Over the past decade, postsecondary enrollment has declined steadily. But since the onset of the COVID-19 pandemic, fall enrollment for undergraduate students at public institutions in Washington declined by 18%. Notably, enrollment has fallen by 25% at CTCs during the pandemic, outpacing the 10% drop at 4-year institutions. Enrollment patterns varied for different groups of students, but overall, the pandemic exacerbated several existing inequities or undid progress towards narrowing disparities in enrollment. It is also important to ensure that strategies to boost enrollment and student success account for diverse needs for students with different backgrounds. At a time where institutions are still grappling with shifts due to the pandemic and changes in attitudes regarding a college education, it is imperative to continue examining enrollment and identifying opportunities to improve postsecondary enrollment and degree completion.

Technical Notes

Enrollment data presented in this report is for Washington public institutions. Data for 4-year institutions and CTCs was obtained from the Education Research and Data Center. The public 4-year institutions and the State Board for Community and Technical Colleges (SBCTC) provide ERDC with data for reporting and research purposes.

Data for undergraduate students includes all credential-seeking students at CTCs and students classified as undergraduates at 4-year institutions. A small number of students at 4-year institutions, which includes non-matriculated students, were excluded from the undergraduate and graduate enrollment analysis. Undergraduate enrollment at CTCs may include applied baccalaureate, transfer, professional, technical, or other programs.

Enrollment data for 4-year institutions uses final data for 4-year institutions where available. Fall 2022 enrollment data is Day 10 enrollment data because final data was not available at the time of this analysis.

Need-based aid at 4-year institutions is determined by Pell and/or Washington College Grant receipt. Need based aid at CTCs is determined by a variety of aid and waiver receipt.

Enrollment counts by gender include female, male as well as a smaller count of unknown, and sex X. Sex X was added to the PCHEES dataset beginning in 2017-2018 and to the CTC data beginning in 2019-2020. In PCHEES, sex X means "a gender that is not exclusively male or female, including, but not limited to, intersex, agender, amalgagender, androgynous, bigender, demigender, female-to-male, genderfluid, genderqueer, male-to-female, neutrois, nonbinary, pangender, third sex, transgender, transsexual, Two Spirit, and unspecified." In SBCTC, gender X refers to those who are "not exclusively male or female." The visualizations in the report only include counts of female and male to protect student privacy as the counts of unknown and sex X are too small to report.

Analysis of enrollment by age is restricted to students who are between the ages of 10 and 90 at the time of enrollment. Analysis of enrollment by race excludes those whose race was unknown or not reported. Current dual enrollment students—students concurrently enrolled in both high school and college such as Running Start or College in the High School—are excluded.

A transfer student is defined as one who is new at the reporting institution during the reporting term and enrolled in a program of study leading to a first bachelor's degree who was previously enrolled after high school as a student at a different postsecondary institution. This may include transfer from a CTC or from a different 4-year institution.

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Appendix A. Enrollment Trends for Non-Degree Seeking Students at CTCs

Table A1. Fall enrollment headcount for non-degree/award-seeking students at CTCs in Washington

Academic Year	Non-Degree/Award Seeking Headcount
2010-2011	85,382
2011-2012	74,157
2012-2013	68,149
2013-2014	65,207
2014-2015	61,645
2015-2016	62,916
2016-2017	52,398
2017-2018	48,707
2018-2019	50,200
2019-2020	48,571
2020-2021	27,906
2021-2022	30,293
2022-2023	36,082

Source: State Board of Community and Technical Colleges (SBCTC)

Appendix B. Enrollment Trends for Graduate Students

Table B1. Fall enrollment headcount for degree-seeking graduate students at public 4-year institutions in Washington

Academic Year	Graduate Fall Headcount
2010-2011	21,925
2011-2012	21,668
2012-2013	21,787
2013-2014	22,105
2014-2015	22,586
2015-2016	23,304
2016-2017	23,644
2017-2018	23,464
2018-2019	24,488
2019-2020	25,222
2020-2021	26,411
2021-2022	27,090
2022-2023	26,769

Source: Education Research Data Center (ERDC)

Appendix C. Enrollment Trends by Race, Need-Based Financial Aid Status, and Gender

Table C1. Need-based aid for degree-seeking undergraduate resident students by race at public 4-year institutions in Washington

Academic Year	American Indian or Alaska Native		Asian		Black or African American		Hispanic or Latino		Native Hawaiian or Other Pacific Islander		White		Two or More Races	
	N	Y	N	Y	N	Y	N	Y	N	Y	N	Y	N	Y
2010-2011	574	523	6,374	3,973	954	1,711	3,129	3,229	211	180	41,510	16,799	2,728	1,399
2011-2012	467	448	6,009	3,974	900	1,832	3,307	3,733	188	178	41,007	17,796	3,620	1,946
2012-2013	429	373	6,013	3,926	923	1,899	3,575	4,234	205	205	40,154	17,600	4,357	2,433
2013-2014	352	330	6,088	3,943	920	1,845	3,796	4,796	194	188	39,827	17,175	5,176	2,980
2014-2015	298	329	6,300	4,020	1,047	2,043	4,069	5,236	230	230	39,610	17,161	5,499	3,086
2015-2016	281	288	6,583	4,025	1,075	2,145	4,550	5,837	241	237	39,836	16,554	5,893	3,369
2016-2017	312	256	7,192	3,926	1,151	2,001	5,153	6,148	266	231	40,294	15,361	6,357	3,286
2017-2018	287	250	7,247	3,908	1,083	2,000	5,049	6,893	286	282	39,964	15,460	6,777	3,651
2018-2019	292	270	7,496	3,967	1,040	1,773	5,511	7,252	317	320	40,027	14,553	7,156	3,813
2019-2020	286	220	7,286	3,923	974	1,604	5,775	7,583	372	355	39,292	13,800	7,674	3,857
2020-2021	231	240	6,503	4,633	837	2,230	5,119	8,185	391	391	34,196	15,859	7,234	4,706
2021-2022	168	233	6,604	4,350	808	2,264	4,699	8,058	422	447	32,898	14,906	7,290	4,831

Source: Education Research Data Center (ERDC)

Note: Race/Ethnicity categories for 'Other' and 'Race Not Reported' are not included in the table. Fall 2022 financial aid data for 4-year institutions was not available at time of analysis.

Table C2. Need-based aid for degree-seeking undergraduate resident students by race at CTCs in Washington

Academic Year	American Indian or Alaska Native		Asian		Black or African American		Hispanic or Latino		Native Hawaiian or Other Pacific Islander		White		Multiracial	
	N	Y	N	Y	N	Y	N	Y	N	Y	N	Y	N	Y
2010-2011	1,100	928	10,235	3,100	4,338	4,512	7,557	6,013	603	379	59,853	35,464	5,438	3,889
2011-2012	1,041	909	10,447	3,162	4,056	4,582	7,222	7,074	552	416	53,298	36,110	5,382	4,248
2012-2013	983	848	10,735	3,230	4,170	4,329	7,805	7,346	532	426	50,275	34,231	5,646	4,345
2013-2014	793	805	10,877	3,359	3,858	4,264	8,123	7,943	487	401	47,866	32,815	5,728	4,620
2014-2015	845	735	10,901	3,306	3,837	3,986	8,342	8,525	511	400	46,855	30,148	5,977	4,752
2015-2016	858	668	10,997	3,233	3,949	3,772	5,877	5,866	500	387	47,681	27,379	7,875	5,684
2016-2017	905	705	10,531	3,162	3,876	3,608	6,375	5,975	566	394	45,691	25,152	7,965	5,535
2017-2018	847	600	11,766	3,275	4,015	3,328	6,658	6,084	561	354	45,901	23,508	9,403	5,932
2018-2019	797	517	10,950	3,002	4,000	3,317	6,717	6,265	536	357	44,490	22,056	9,925	6,300
2019-2020	745	517	10,257	2,966	4,075	3,373	6,732	6,543	548	326	42,402	21,768	10,326	6,870
2020-2021	587	426	8,591	2,834	3,554	2,991	5,644	5,658	484	311	36,329	19,318	9,509	6,440
2021-2022	591	308	8,391	2,215	4,045	2,684	6,592	3,816	509	264	35,949	13,031	10,059	4,955
2022-2023	404	374	6,741	3,307	3,206	3,967	4,834	5,547	375	343	27,071	17,231	8,432	7,799

Source: State Board of Community and Technical Colleges (SBCTC)

Note: Race/Ethnicity category for 'Race Not Reported' are not included in the table.

Table C3. Fall enrollment by race/ethnicity and gender for degree-seeking undergraduate students at public 4-year institutions in Washington

Academic Year	American Indian or Alaska Native		Asian		Black or African American		Hispanic or Latino		Native Hawaiian or Other Pacific Islander		White		Two or More Races	
	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male
2010-2011	620	477	5,307	5,035	1,328	1,337	3,607	2,749	199	192	30,542	27,739	2,297	1,829
2011-2012	511	404	5,168	4,807	1,377	1,354	3,976	3,061	181	185	30,727	28,049	3,052	2,512
2012-2013	438	364	5,048	4,883	1,386	1,435	4,404	3,401	202	208	29,911	27,819	3,705	3,083
2013-2014	396	286	5,019	5,009	1,416	1,349	4,852	3,736	194	188	29,564	27,413	4,402	3,751
2014-2015	374	253	5,246	5,072	1,589	1,501	5,309	3,994	237	223	29,493	27,275	4,730	3,855
2015-2016	329	240	5,440	5,165	1,662	1,558	5,928	4,459	256	222	29,476	26,909	5,106	4,153
2016-2017	331	237	5,716	5,400	1,641	1,511	6,529	4,771	267	230	29,112	26,535	5,301	4,339
2017-2018	313	224	5,696	5,453	1,599	1,483	6,844	5,093	307	261	29,225	26,159	5,647	4,773
2018-2019	333	229	5,867	5,590	1,495	1,317	7,403	5,351	344	292	28,930	25,595	5,900	5,060
2019-2020	303	203	5,812	5,391	1,363	1,212	7,838	5,506	389	337	28,444	24,598	6,346	5,176
2020-2021	285	186	5,901	5,230	1,666	1,398	7,926	5,367	419	361	27,205	22,810	6,577	5,357
2021-2022	248	153	5,872	5,080	1,705	1,365	7,694	5,055	469	399	26,177	21,585	6,652	5,463
2022-2023	226	143	5,660	4,991	1,763	1,452	7,510	5,085	495	430	24,716	20,623	6,645	5,548

Source: Education Research Data Center (ERDC)

Note: Race/Ethnicity categories for 'Other' and 'Race Not Reported' are not included in the table.

Table C4. Fall enrollment by race/ethnicity and gender for degree-seeking undergraduate students at CTCs in Washington

Academic Year	American Indian or Alaska Native		Asian		Black or African American		Hispanic or Latino		Native Hawaiian or Other Pacific Islander		White		Multiracial	
	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male
2010-2011	1,098	926	6,958	6,352	4,295	4,535	7,617	5,921	533	447	51,262	43,841	5,135	4,177
2011-2012	1,098	847	7,052	6,524	4,304	4,312	8,042	6,218	509	455	48,656	40,525	5,346	4,247
2012-2013	1,038	787	7,193	6,745	4,228	4,244	8,566	6,542	547	407	45,963	38,309	5,584	4,366
2013-2014	891	700	7,267	6,927	3,974	4,114	8,996	7,013	507	377	43,617	36,774	5,736	4,555
2014-2015	853	716	7,207	6,939	3,843	3,941	9,443	7,369	477	431	41,228	35,474	5,883	4,778
2015-2016	835	679	7,156	7,006	3,849	3,824	6,564	5,119	499	387	39,851	34,793	7,548	5,908
2016-2017	905	663	6,826	6,702	3,685	3,663	6,817	5,362	526	411	36,771	32,673	7,354	5,960
2017-2018	811	592	7,585	7,287	3,675	3,529	7,069	5,462	501	391	35,886	31,793	8,298	6,704
2018-2019	761	528	7,078	6,724	3,800	3,391	7,378	5,379	488	387	34,833	30,261	8,845	7,086
2019-2020	725	511	6,754	6,316	3,896	3,432	7,611	5,459	494	365	34,132	28,784	9,546	7,366
2020-2021	611	383	6,129	5,131	3,595	2,815	6,847	4,233	473	300	30,732	23,497	9,388	6,223
2021-2022	530	339	5,644	4,732	3,674	2,882	6,082	4,041	439	304	26,310	21,057	8,802	5,812
2022-2023	444	305	5,273	4,416	3,892	2,998	5,873	4,079	400	285	22,978	19,371	9,335	6,333

Source: State Board of Community and Technical Colleges (SBCTC)

Note: Race/Ethnicity category for 'Race Not Reported' are not included in the table.