

Postsecondary Enrollment Recovery Falling Short of Workforce Needs

Washington's economy is poised for significant growth, with more than 1.5 million job openings projected by 2032 in fields like education, healthcare, advanced computing, skilled trades, and clean tech—industries critical to long-term prosperity. However, this growth is far from guaranteed. Achieving it will require Washington to remain a hub for innovation and job creation while addressing a chronic talent gap. Seventy-five percent of projected job openings over the next decade will require postsecondary credentials, yet only 40% of Washington high school students are expected to earn one.

If current trends persist, the state will come up short by nearly 600,000 of the credentialed workers it needs by 2032, including 301,000 workers with bachelor's degrees. At the same time, more than a quarter million uncredentialed adults will face limited opportunities, competing for a shrinking pool of low-wage jobs while demand for skilled workers surges.

Recent postsecondary enrollment trends reveal the challenge of meeting projected demand for workers with degrees, apprenticeships, and high-value industry certifications. After years of stagnation, enrollment at Washington's colleges and universities plummeted during the pandemic. Community and technical colleges (CTCs) lost over 53,000 students—a 24% decline—from fall 2019 and fall 2022, while public baccalaureate institutions lost 10,000 resident undergraduates (an 11% drop).

Encouragingly, enrollment began to rebound in 2023, led by CTCs, which have increased enrollment by more than 25,000 students over the last two years. Public baccalaureate institutions, however, have struggled to recover, with 2024 enrollment essentially flat compared to 2022. While the University of Washington (UW) has surpassed pre-pandemic enrollment levels, other public baccalaureate institutions remain under-enrolled.

Total postsecondary enrollment remains 12.5% below pre-pandemic levels, with 38,801 fewer students enrolled in fall 2024 compared to fall 2019. This includes a 12.8% decline (-28,271 students) at CTCs and a 12% decline (-10,530 students) at public baccalaureate institutions.

There are bright spots. First-year enrollment at public baccalaureate institutions is recovering faster than overall enrollment. Enrollment of students of color across all community, technical, and baccalaureate institutions is up 1.3% (+1,580 students) compared to fall 2019, with enrollment of Black students up 18.8% (+2,895 students). While these trends offer hope, the recovery remains too slow to meet projected workforce needs.



1.

Open Capacity Across Colleges and Universities

Washington's public colleges and universities have significant capacity to enroll more students. While the University of Washington (UW) has surpassed pre-pandemic enrollment levels, enrollment at other public baccalaureate institutions is down 8.7% to 33.5% compared to 2019. Similarly, CTCs, though recovering, remain 12.8% below pre-pandemic enrollment. Filling this capacity will be critical to meeting workforce needs and supporting students in completing the credentials needed for economic mobility.

2.

First-Year Enrollment Holds Promise

First-year enrollment at public baccalaureate institutions is recovering faster than overall enrollment, with increases in each of the last two years. Year-over-year gains in fall 2024 are evident across multiple institutions, including the University of Washington (UW), Washington State University (WSU), Eastern Washington University (EWU), and Central Washington University (CWU). First-year enrollment among Pell-eligible students is up 10.1% compared to 2019. First-year enrollment of students of color has grown 4.8% since 2019.

3.

Steps Forward in Equity

The number of Pell-eligible students enrolled at public baccalaureate institutions and the percentage of CTC students receiving financial aid still trails pre-pandemic levels, however both are trending in an upward direction. Total year-over-year enrollment of Pell-eligible students at public baccalaureate institutions grew 21.4% (+4,843 students) in fall 2024, and the percentage of students receiving aid at CTCs rose 19.9% (+7,695 students).

Overall, enrollment of students of color across all institutions is up 11.5% (+13,090 students) year-over-year and 1.3% (+1,580 students) compared to pre-pandemic. Gains are led by increases in enrollment among Black students (up 18.8% or +2,895 students since 2019) and Hispanic and Latino students (up 2.5% or +876 students since fall 2019). However, there has been a notable falloff in enrollment of white students, down 18.6% (-27,100 students) since fall 2019.

PUBLIC BACCALAUREATE RESIDENT UNDERGRADUATE ENROLLMENT

YEAR-OVER-YEAR:

Fall 2024 enrollment of resident undergraduates is up 0.4% (+270 students) compared to fall 2023.

- Resident undergraduate enrollment is up 2.8% (+848 students) at UW and 8.7% (+158 students) at The Evergreen State College (TESC). Year-over-year enrollment is down 0.5% to 4.4% at the other institutions.
- Enrollment of first-year resident undergraduates is up 1.4% (+224 students) year-over-year across all institutions. This includes increases at UW, WSU, EWU, and CWU.
- All six institutions increased enrollment of Pell-eligible resident undergraduate students year-over-year, with enrollment up 21.4% (+4,843 students) across the sector.
- Enrollment of resident undergraduate students of color is up 3.2% (+1,097 students), driven by enrollment gains at UW, WSU, and TESC.

COMPARED TO PRE-PANDEMIC:

Fall 2024 enrollment of resident undergraduates is down 12% (-10,530 students) since fall 2019.

- UW has surpassed its pre-pandemic enrollment for resident undergraduates. Fall 2024 enrollment at the other five institutions is down 8.7% to 33.5% compared to pre-pandemic.
- Enrollment of first-year resident undergraduate students is down 3.4% (-562 students) compared to fall 2019, despite gains by UW (+9.1% or 541 students) and TESC (+36.5% or 66 students).
- Enrollment of Pell-eligible resident undergraduate students is down 3.8% (-1,085 students), despite gains by UW (+9.1% or 894 students).
- Enrollment of resident undergraduate students of color is up 0.5% (+161 students) compared to pre-pandemic, led by gains at UW (+11% or 1,896 students), WSU (+2% or 136 students) and TESC (+9.9% or 67 students).

COMMUNITY AND TECHNICAL COLLEGE ENROLLMENT

Fall 2024 enrollment across Washington's 34 community and technical colleges is down 12.8% (-28,271 students) compared to fall 2019, but year-over-year enrollment was up 7.6% (+12,830 students) in fall 2023 and another 6.9% (+12,454) in fall 2024.

- The percentage of students receiving financial aid is down 2.3% (or -1,069 students) from fall 2019 to fall 2024. However, it is up 19.9% (+7,695 students) from fall 2023 to fall 2024.
- Enrollment of students of color is up 1.6% (+1,419) since pre-pandemic, including a 15.2% increase (+11,993) from fall 2023 to fall 2024.



OPPORTUNITIES FOR ENROLLMENT RECOVERY & GROWTH

Filling Open Capacity at Public Baccalaureate Institutions. Washington's public universities are critical to addressing the state's workforce needs. Programs like the Washington Guaranteed Admissions Program (WA-GAP), which guarantees admission for public high school students based on GPA thresholds and completing a 'college-ready' course of study, have shown promise in reaching students who may not have seen themselves pursuing college. Expanding WA-GAP statewide, simplifying admissions processes, and enhancing student supports can help these institutions attract more students.

Strengthening Community and Technical Colleges as Enrollment Engines. CTCs will continue to be central to Washington's postsecondary recovery. Over the last two years, they have added 25,000 students, demonstrating their potential to drive further growth. By prioritizing workforce-aligned credentials—such as applied bachelor's degrees, direct transfer associate degrees, apprenticeships, and stackable certificates in high-demand fields—CTCs can better meet economic needs. Strengthening transfer pathways to baccalaureate institutions will also solidify their role as pipelines to advanced degrees and credentials.

Advancing Equity in Postsecondary Education and Training. Gains in enrollment among communities of color signal progress and highlight the need for continued focus on equity. Expanding dual credit access can help reach more students. Enhanced advising and career exploration resources will ensure students understand their pathways to postsecondary education and the financial resources available to them.

Focusing State Investments. The types of credentials students earn matter for their economic mobility and meeting the demands of our state's economy. Institutions are pursuing completion strategies, including targeted wraparound supports, the use of predictive analytics, and improved advising, but more can be done. The state should look to provide incentives for postsecondary institutions to: increase credential production in high-demand fields, focus on student populations that have been historically underserved, ensure state and student 'return on investment,' and provide funding that considers the true costs of program offerings including equipment, competitive faculty salaries, student outreach and support, etc.

METHODOLOGY: This report is based on enrollment data provided by Washington's public baccalaureate institutions and the State Board for Community and Technical Colleges and analyzed by Kinetic West. Data was shared with Washington Roundtable in late 2024 and reflects fall 2024 enrollment. Analyses focus on changes compared to pre-pandemic enrollment levels in 2019, the post-pandemic low in 2022, and year-over-year changes through 2023 and 2024.