CASE Insights℠
on Enrollment Trends

in partnership with

CAMPBELL & COMPANY

2025 KEY FINDINGS

COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION

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ABOUT CASE

CASE—the Council for Advancement and Support of Education—is a global, not-for-profit membership association with a vision to advance education to transform lives and society.

CASE is the home for advancement professionals, inspiring, challenging, and equipping them to act effectively and with integrity to champion the success of their institutions. CASE defines the competencies and standards for the profession of advancement, leading and championing their dissemination and application for more than 90,000 advancement professionals at 3,000 member institutions in 80 countries. Broad and growing communities of professionals gather under the global CASE umbrella. Currently, these professionals include those working in alumni relations, development and advancement services, communications, fundraising, government relations, and marketing. These professionals are at all stages of their careers and may be working at universities, schools, colleges, cultural institutions, or other not-for-profit organizations.

Headquartered in Washington, D.C., CASE works across all continents from its regional offices in London, Singapore, and Mexico City to achieve a seamless experience for all its stakeholders, particularly its members, volunteers, and staff.

CASE COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION

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ACKNOWLEDGEMENTS
This project would not have been possible without the support of Campbell and Company. CASE is grateful to Campbell and Company for sponsoring and helping to conduct this important research and for actively participating in the production of this report.

This report is based on the information and insights that U.S. and U.K. advancement and enrollment professionals shared through their participation in our survey. We are grateful to them for generously giving their time and for candidly sharing their experience and expertise. This report reflects the excellent work that they have been doing on behalf of their institutions, students, alumni, and broader communities during challenging times. Thank you all.

NOTE FROM CASE PRESIDENT AND CEO

For years, those of us fortunate enough to work in the field of education have been wary of an impending or existing cliff. Shifting demographics, declining public trust, government policies and evolving economic constraints are among the contributing factors to sector-wide enrolment pressures. In response to great interest from our members, CASE partnered with Campbell & Company to better understand how institutions are navigating these challenges.

The first edition of CASE Insights on Enrolment Pressures affirms what many have sensed: these pressures are real and widespread. Seven in ten respondents have experienced or expect to experience enrolment challenges within the next five years. Fewer than half feel fully prepared to address them, and a majority expect revenue shortfalls for their institutions as a result. This report is intended as both a benchmark and a source of inspiration for participants.

Let me begin with a note of encouragement. Abundantly demonstrated in these findings is the resilience of the higher education sector. What shines through most clearly in this research is the fortitude, adaptability, and determination of our institutions. Leaders are making thoughtful, sometimes difficult decisions to reexamine existing resources, exploring new financing strategies, and in some cases, making strategic choices to refine or focus their academic offerings. As one respondent shared on p. 15, “We adopted an ‘invest our way through’ mentality.” Others are doubling down on mission, choosing clarity and authenticity as guiding principles in uncertain times.

For some, preparing to be smaller is an option, but is not a sign of retreat; it reflects a sector that is evolving with purpose. Creativity, openness to change, and a willingness to make bold decisions all point to a future of continued vitality for higher education.

If you take but one insight from these findings, let it be the opportunity for collaboration across your institution and between institutions. Enrolment challenges cannot solely rest on the shoulders of enrolment teams. Professionals across advancement disciplines are critical partners and bring essential skills in relationship-building, storytelling, and engagement that can amplify student recruitment and retention efforts. As one respondent noted on p. 10, “We believe that it is everyone’s job on our campus to be a fundraiser and a recruiter.”

This shared sense of responsibility can strengthen institutional culture and align efforts across teams. Marketing and communications teams position the institution for prospective students and their parents. Alumni relations teams work their magic through prospective student engagement opportunities. Development officers secure support and steward donors committed to student access and success. Engaging prospective and current students and their families meaningfully today lays the foundation for lifelong relationships, creating a community that champions and supports our institutions in the years to come.

Thank you to all who contributed to this research. Your frankness and insight provide an invaluable foundation for continued learning and collective progress. By sharing knowledge and supporting one another, we can ensure that higher education meets this moment and emerges stronger because of it.

Sue Cunningham
President and CEO
CASE

KEY INSIGHTS

PRESSURES LEADING TO ENROLLMENT CHALLENGES

- Seven in 10 respondents either have experienced enrollment challenges or anticipate them within the next five years.
- While demographic trends were a significant factor contributing to enrollment challenges, respondents cited a broader set of drivers, including academic offerings that do not align with market demand, decreasing trust in the value of higher education, and insufficient or inflexible scholarship support.
- Institutions anticipating enrollment challenges in the near future also point to policy changes, particularly those affecting international students, as a contributing factor.
- Respondents who do not expect to experience enrollment crises primarily attribute this positive outlook to institutional characteristics as well as sustained investment in marketing and recruitment.

READINESS AND RESPONSES TO ENROLLMENT CHALLENGES

- Institutional readiness is uneven: more than one-third of respondents whose institutions had experienced enrollment challenges reported they were unprepared.
- Institutions that have already navigated enrollment challenges tend to report they have weathered the crises well, compared to those currently experiencing or anticipating them.
- By far the most popular tactic employed by institutions in response to enrollment challenges was to implement a review of existing funds to identify possible avenues for savings. The next most widely adopted tactics were to move programs online and to close programs. Half of respondents have had to take the difficult step of closing programs.

COLLABORATIVE MARKETING & COMMUNICATION AND ADVANCEMENT STRATEGIES

- Respondents working in marketing & communication are taking a comprehensive approach in addressing enrollment challenges, employing a range of tactics, and advocating for their institutions to invest in the creation or expansion of programs to meet market demands.
- Advancement teams are emerging as critical partners in institutional responses. Many are emphasizing solicitations for programs that meet market demands, working more closely with campus partners, and expanding the scope of their work.

PLANNING FOR THE FUTURE

- Financial risk is significant: 56% of all respondents expect a revenue shortfall, particularly those already actively experiencing or anticipating enrollment challenges in the next five years.
- While most respondents expect these shortfalls to be relatively modest, the external pressures—including the rising cost of education, inflation, and decreased government funding—underscore the need for a proactive, coordinated strategy.
- Respondents employed a wide variety of tactics to respond to and manage the challenges confronting education, providing reason for optimism about the resilience of educational institutions.

DEFINING ADVANCEMENT

Advancement, as CASE defines it, is a strategic, integrated method of managing relationships to increase understanding and support among an educational institution's key constituents, including alumni and friends, government policy makers, the media, members of the community, and philanthropic entities of all types.

INTRODUCTION

Higher education institutions are increasingly focused on what is often described as the "demographic cliff" or "enrollment cliff," a projected decline in the number of traditional-age college students driven by lower birth rates following the Great Recession.[1] In the United States, these trends are now at an inflection point, as the number of high school graduates reached its projected peak around 2025 and begins a period of gradual decline in the years that follow.[2]

At the same time, these demographic trends reflect a more complex and uneven global landscape. Some countries, including Japan, have already experienced sustained declines in youth populations, while others, including the United States, are now entering this period of contraction.[4] In the United Kingdom, demographic pressures are expected to emerge more gradually over the coming decade.[5,6] By contrast, in parts of Africa and South Asia, youth populations continue to grow, increasing demand for access to higher education rather than reducing it.[4] Even within countries, the timing and magnitude of demographic change vary significantly by region.[3] As a result, what is often described as a single "cliff" is better understood as a set of regionally distinct trends unfolding at different times and, in some cases, not occurring at all.[4]

In addition to demographic factors, enrollment patterns are shaped by policy and market dynamics. In both the United States and United Kingdom, recent enrollment pressures reflect not only changes in domestic student populations but also shifts in international student mobility and regulatory environments.[5,6] Together, these factors contribute to a broader set of enrollment challenges that differ by geography, institutional type, and student segment.

To better understand how these dynamics are experienced at the institutional level, and how they are influencing advancement strategy, CASE and Campbell & Company fielded an online survey in 2025. While the survey was distributed across CASE's global membership and included a range of institution types, including independent and international schools, responses were concentrated in the United States and United Kingdom. As a result, the findings presented in this report should be interpreted primarily in the context of those countries.

It is also important to recognize that enrollment challenges, particularly those associated with demographic change, are often viewed as sensitive and evolving issues for institutions. This report reflects a range of perspectives and experiences, from emerging concerns to more immediate and sustained enrollment pressures, and uses language intended to capture that range with care. The findings suggest that enrollment pressure is no longer only an admissions concern. It is an institution-wide strategic issue with direct implications for revenue planning, academic portfolio decisions, scholarship strategy, brand positioning, fundraising, alumni engagement, and donor communications.

SURVEY RESPONDENTS

With 76 U.S. and U.K. respondents, this study provides valuable insight into how colleges and universities—and advancement teams in particular—are experiencing and responding to enrollment pressures. These findings offer an important directional view of institutional strategy and can inform future research with broader participation. CASE also appreciates the participation of member institutions in Brazil, Canada, India, Nigeria, and Switzerland. Given the smaller number of respondents, however, findings are not reported separately for these countries or regions.

The respondent institutions included a diverse array of institution types. Both public and private institutions were well represented among the responding institutions. Most respondents (61%)

worked at universities with undergraduate and graduate offerings, but respondents also included staff at primarily undergraduate colleges, community and technical colleges, independent or international schools, academic healthcare and other professional institutions. The respondent institutions were evenly distributed in terms of total institution budget and funds received through philanthropic contributions.[7] Most of the individuals who completed the survey (79%) work in advancement. The remaining respondents work primarily in marketing & communications. Respondents were most likely to work on teams with fewer than 25 full-time staff.

Figure 1: Summary of Respondent Characteristics

Institution Control*	
Public	56%
Private, not-for-profit	44%
Institution Type	
Universities with undergraduate and graduate programs	61%
Undergraduate colleges	14%
Community or technical colleges	13%
Independent or international schools	9%
Healthcare or professional institutions	2%
Institution Budget	
Less than $100M U.S.	39%
$100M to $499M	24%
$500M or more	37%
Funds Received Annually from Philanthropic Giving	
Less than $10M U.S.	36%
$10M to $99M	42%
$100M or more	22%
Respondent Teams	
Advancement: Fundraising or development	51%
Advancement: Operations	16%
Advancement: Alumni/ae relations	5%
Advancement: Other	6%
Marketing & communications	18%
Other	2%
Respondent Team Size	
Fewer than 25 full-time staff	60%
25-99 full-time staff	26%
100+ full-time staff	14%

n = 76
*Survey participants self-reported their Public/Private status.

A Note on Language: In this research project, the terms "enrollment crises" and "enrollment challenges" are used to describe significant problems that emerge due to actual or expected decreases in overall enrollment or declines among specific student populations. These issues may arise from a range of factors, including demographic shifts (sometimes called the enrollment cliff), caps on international admissions, decreasing numbers of applicants, or other factors. For clarity and consistency, the terms are used interchangeably throughout the report to refer to this broader set of enrollment-related pressures.

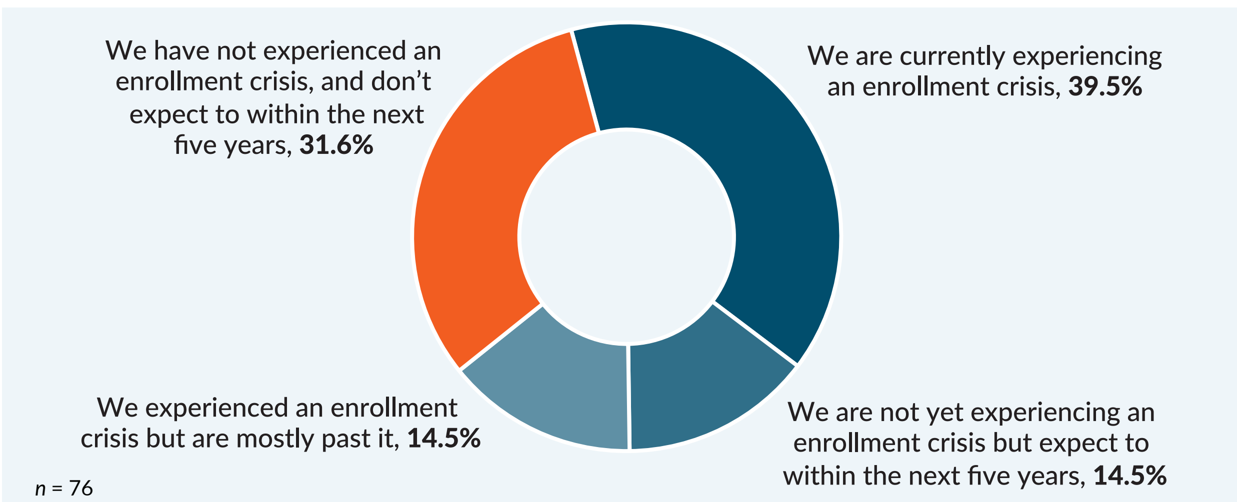
Due to rounding, totals in tables and figures may not produce exact sums, and percentages may not equal 100.

INSTITUTIONS ARE EXPERIENCING ENROLLMENT CHALLENGES ACROSS A SPECTRUM OF URGENCY

A keystone question of the survey divided the respondents into four groups according to their experience with enrollment challenges or crises. The largest group of respondents (39.5%) reported currently experiencing an enrollment crisis. Another 29.0 percent are evenly split between those who recently experienced an enrollment crisis that has largely subsided and those who anticipate a crisis within the next five years. Finally, almost one-third of respondents (31.6%) are not in the midst of a crisis and do not expect one within the next five years.

68.5% of US and UK respondents have experienced, are experiencing, or expect to experience an **enrollment challenge**

Figure 2: Enrollment Experience, All U.S. and U.K. Respondents



Institution type and budget size did not have a significant impact on how respondents answered this question. However, institutions with larger philanthropic contributions were somewhat less likely to have experienced an enrollment crisis or to anticipate one in the near future. The U.S. had a significant proportion of institutions that have not had—and do not anticipate—enrollment challenges (35%), while this was not the case for the United Kingdom. All U.K. respondents are currently experiencing challenges, have had challenges, or anticipate them in the next several years.

These institutional experiences influence respondents' perspectives on all the other survey questions, so respondents are disaggregated by these categories throughout the report.

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ENROLLMENT CHALLENGES ARE DRIVEN BY MULTIPLE, INTERCONNECTED FACTORS

Institutions that have either experienced enrollment challenges recently, are experiencing them now, or anticipate them in the near future were asked to evaluate a series of potential contributing factors. Across all groups, demographic shifts emerged as the most consistently influential factor: 91% of respondents indicated at least a moderate impact, and nearly 4 in 10 cited a significant impact.

However, enrollment challenges—and the resulting lost revenues—are not driven by demographics alone. A majority of respondents also identified declining trust in the value of higher education and academic offerings that do not meet market demand as having at least a moderate impact. In addition, nearly one-third of respondents rated inadequate or inflexible scholarship support as a significant factor.

Other influences vary across institutions. For example, caps on international enrollment are more likely to be viewed as a significant factor by institutions anticipating future challenges than by those currently experiencing or emerging from them. Taken together, these findings suggest that enrollment pressures are shaped by a combination of structural, financial, and perception-based factors, with relative importance differing by institutional context.

SCHOLARSHIPS AND FUND MANAGEMENT

One institution described its most successful strategies: "Aggressive fundraising push for need based aid and general scholarship dollars. Modernized systems to automate scholarship awarding and more frequent coordination with campus partners to maximize the amount of scholarship dollars deployed in student recruitment and retention."

Figure 3: Causes of Enrollment Challenges

	Challenge Largely Subsided	Currently Experiencing Challenge	Anticipate Challenge in Next 5 Years	All Respondents
Demographic Shifts				
No impact	0%	8%	20%	9%
Moderate impact	60%	58%	30%	52%
Significant impact	40%	35%	50%	39%
Caps on International Enrollment				
No impact	70%	57%	25%	54%
Moderate impact	20%	30%	38%	29%
Significant impact	10%	13%	38%	17%
Decreasing Trust in Value of Higher Education				
No impact	30%	17%	20%	20%
Moderate impact	60%	66%	60%	63%
Significant impact	10%	17%	20%	16%
Academic Offerings that Do Not Meet Market Demand				
No impact	30%	27%	33%	29%
Moderate impact	70%	63%	44%	61%
Significant impact	0%	10%	22%	10%
Inadequate or Inflexible Scholarship Support				
No impact	30%	20%	22%	22%
Moderate impact	50%	50%	33%	47%
Significant impact	20%	30%	44%	31%

n = 49

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Respondents also had the opportunity to identify factors through free response questions. They reported on a wide array of influences, including the COVID-19 pandemic, increased competition among institutions, government rhetoric on immigration and international students, public concern regarding tuition prices, and declining government support.

TIMING AND DURATION OF ENROLLMENT CHALLENGES

Among institutions whose enrollment challenges have largely subsided, the length of the crisis is quite variable, with onset ranging from less than two years to over two decades ago. For half of these institutions, the crisis began at least five years ago.

For those currently experiencing a crisis, half report that it began between two and five years ago, with 30% stating the crisis has been in effect for less than two years. The remaining 20% report longer-running challenges.

Expectations for the duration of current challenges also vary, with 52% estimating two to five years. About 20% of this group are more optimistic, with an expectation that their challenges will subside in less than 2 years, while 30% are much more pessimistic, expecting the crisis to stretch for five years to 20 years or even indefinitely.

YOUR BEST ADVOCATES

"Redoubled our efforts to mobilise alumni relations in support of international recruitment." Another institution noted, "It is job one. In fact, this afternoon our development team is meeting with the new regional recruiting officers to discuss collaboration... We believe that it is everyone's job on our campus (all faculty and staff) to be a fundraiser and a recruiter."

Among those who are not yet experiencing challenges but expect them, most think problems will begin within one to three years. They are varied in their expectations about how long a crisis may last, with estimates ranging from two to five years to indefinitely.

ACT AND INVEST NOW

The data indicate that, for many institutions, enrollment challenges take longer to resolve than they had expected. Thus, planning ahead may help to reduce the duration of your current enrollment crisis to the 1– to 5–year range that many expect. "We are being as proactive as possible in looking at alternative solutions and exploring initiatives that we would have never considered." Another institution advises, "Invest in advancement and other earned revenue opportunities sooner."

Figure 4: Timing and Duration of Enrollment Crises

	Challenge Largely Subsided	Currently Experiencing Challenge
When did the enrollment crisis start?		
Less than 2 years ago	20%	30%
Between 2 and 5 years ago	30%	50%
Between 5 and 10 years ago	30%	20%
Between 10 and 20 years ago	20%	0%
How long do you expect it to last?		
Less than 2 years	20%	19%
Between 2 and 5 years	30%	52%
Between 5 and 10 years	40%	11%
Between 10 and 20 years	10%	4%
Indefinitely	0%	15%

n = 40

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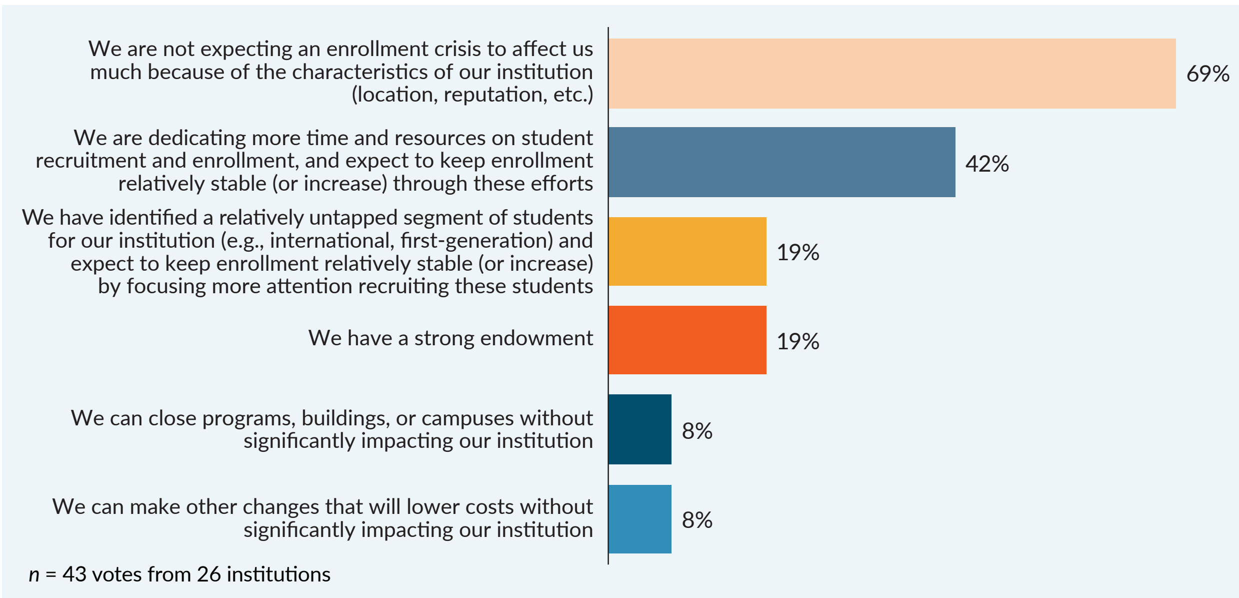
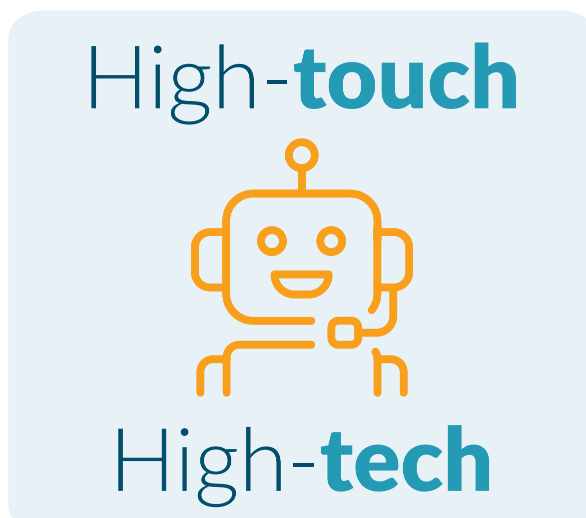
INSTITUTIONS THAT DO NOT EXPECT ENROLLMENT CHALLENGES

The institutions not experiencing or anticipating enrollment crises were asked to evaluate several factors that may allow their institutions to avoid this problem. They were most likely to cite that their institutional characteristics were helping them avoid enrollment crises (selected by 69% of institutions) and/or that they had dedicated time and resources to recruitment and enrollment (selected by 42% of institutions) that they believe will prevent enrollment challenges.

Figure 5: Factors Preventing Enrollment Crises



Respondents volunteered additional reasons why they do not anticipate enrollment challenges. Several respondents cited focused recruitment and retention activities that include both high-touch (phone campaigns) and high-tech (AI-driven) approaches. Some respondents cited the selectivity of their institution; others mentioned their institution's open enrollment policies. It is interesting that being situated at either end of the admission selectivity continuum may help to provide some immunity to enrollment challenges. Respondents also described factors they expect to insulate their institution from enrollment challenges, including 1) expanded access pathways through partnership with community colleges, 2) career-oriented academic programs, and 3) adherence to a focused strategic plan when making tough decisions.



CAPITALIZING ON ACCESS

"As a public institution, we are partnering with community colleges, creating pathways to college, and overall making the institution more accessible."

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INSTITUTIONAL RESPONSES TO ENROLLMENT CHALLENGES

OVERALL ASSESSMENT

Respondents that have experienced an enrollment crisis, that are currently experiencing enrollment challenges, or that anticipate future enrollment pressures answered several questions that sought to establish an overall assessment of institutions' reactions to enrollment challenges.

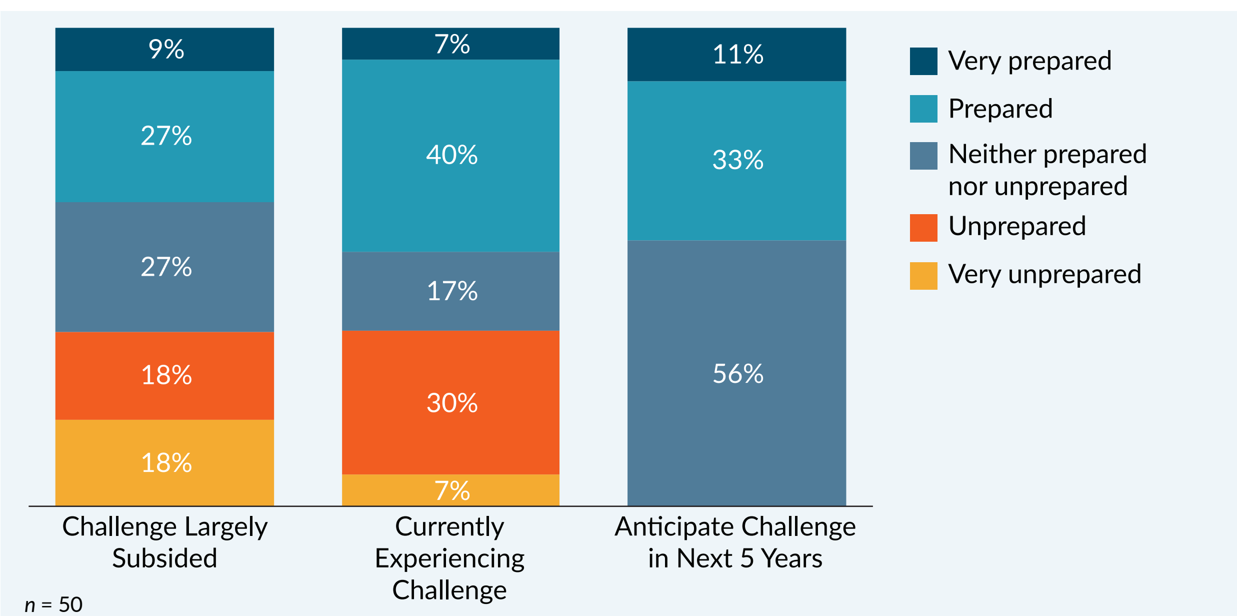
Respondents were asked to assess their institutions' level of preparedness for enrollment challenges, and their responses varied depending on institutional experience.

Among institutions where enrollment challenges have largely subsided, views on preparedness are mixed: respondents were roughly as likely to rate their institution as unprepared or very unprepared as they were to describe them as prepared or very prepared.

Those currently experiencing enrollment challenges evaluated their institutions somewhat more favorably, with almost half (47%) describing their institution as prepared or very prepared. Nonetheless, 37% of these institutions still characterized their institutions as unprepared, highlighting a continued sense of uncertainty, even while actively navigating these pressures.

Respondents anticipating future challenges express a different kind of uncertainty. While 44% considered their institutions prepared or very prepared, and none expressed concern that their institution was unprepared, more than half chose "neither prepared nor unprepared," suggesting a level of uncertainty about their institutions' level of preparation overall.

Figure 6: Level of Preparation for Enrollment Challenges



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93%

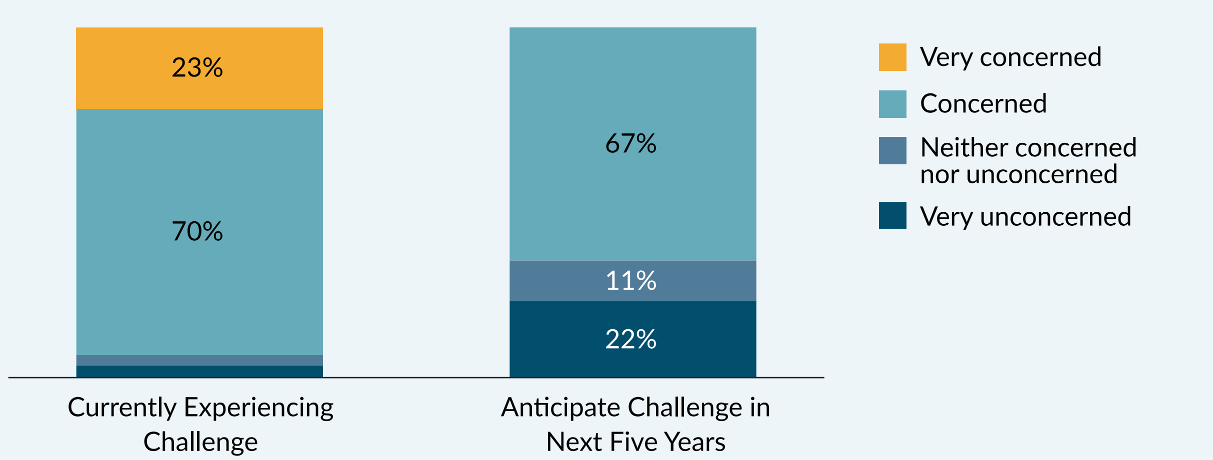
of institutions currently experiencing an enrollment crisis **report high levels of concern**

Respondents' assessment of how well their institutions have navigated or expect to navigate enrollment challenges varied by institution. Among institutions where enrollment challenges have largely subsided, respondents generally reported positive outcomes: 55% indicated their institutions weathered the crisis "well" or "very well," with the remainder selecting "fairly well." None said that their institution had weathered the crisis poorly. In contrast, institutions currently experiencing an enrollment crisis reported high levels of concern. More than 90% described themselves as "concerned" or "very concerned" about their institution's ability to respond.

Respondents anticipating enrollment challenges in the next five years also expressed concern, though responses were more varied. While a majority (67%) reported being concerned, a notable share indicated either uncertainty (11%) or low concern (22% very unconcerned), suggesting less consensus about how future challenges may unfold.

It is impossible to know whether survey respondents whose institutions successfully weathered an enrollment challenge were more (or less) likely to participate in the survey, but the results seem to suggest that there is more room for optimism than those in the midst of a crisis or anticipating challenges may currently feel.

Figure 7: Concern Regarding Enrollment Challenges*



n = 39

* No participants chose the category "Unconcerned" regarding enrollment challenges in our survey.

RESPONSE TACTICS REFLECT A BALANCE OF COST CONTAINMENT AND STRATEGIC INVESTMENT

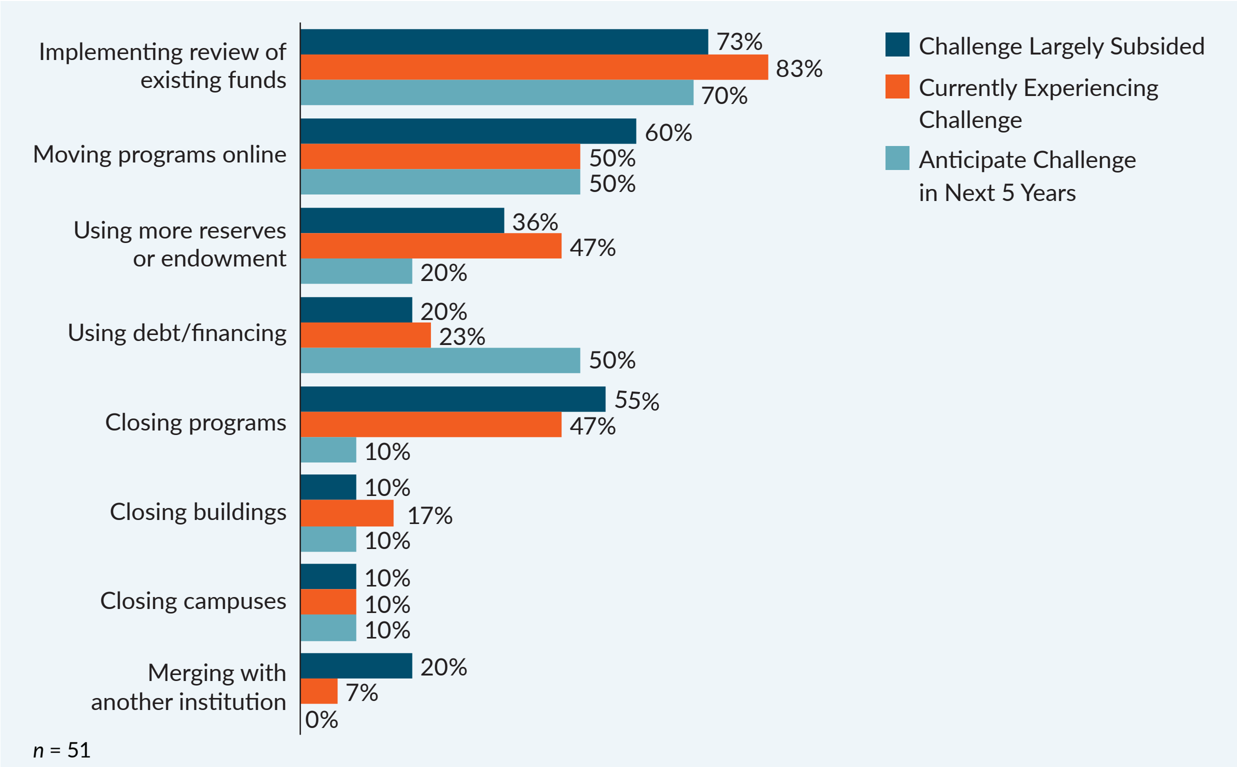
All respondents that either have experienced, are experiencing, or are anticipating enrollment challenges were asked to react to a set of tactics that institutions may use when confronting an enrollment shortfall. By far the most popular tactic was to implement a review of existing funds to identify possible avenues for savings. The next most widely adopted tactics were to move programs online and, in the case of institutions that have experienced or are currently experiencing enrollment challenges, to close programs. Half of respondents in those two categories have had to take that difficult step.

A final tactic commonly employed by institutions that have already experienced enrollment challenges is accessing more funds from reserves or endowment. Interestingly, institutions that anticipate enrollment challenges but have not experienced them yet were more likely to select using debt/financing than tapping into reserves or endowment. This may reflect current views on the pressures already being placed on institutional endowments. The most drastic tactics, including closing buildings or campuses and merging with another institution, may ultimately be viable strategies for some institutions, even though they were not necessarily anticipated beforehand.

SMALLER AND MORE FOCUSED

"Planning on being a smaller institution (10% reduction in student numbers over a 3-year period) and... looking at our size and shape as a result... shrinking our estate [which]... is underutilised... We have a solid plan in place and are executing on that plan."

Figure 8: Tactics to Address Enrollment Challenges



Respondents at institutions that had already implemented some measures to help combat enrollment pressures identified a number of additional actions that their institutions took in an open-ended question. Notably, the tactics that respondents identified were almost uniformly expansionist in nature. Institutions invested in new program areas, expanded outreach to new student markets such as non-traditional students, invested in additional financial aid, and upgraded and expanded their marketing and recruitment efforts. One respondent referred to their institution's strategy as an "*invest our way through mentality*."

A RECIPE FOR SUCCESS

"We adopted an invest our way through mentality… We methodically and strategically invested in key programs that would draw students. We utilized tuition discounting and adopted a net tuition revenue model. No one thing helped us shift our falling enrollment; it was a series of intentional decisions over 5 years."

MARKETING & COMMUNICATION AND ADVANCEMENT RESPONSES

MARKETING & COMMUNICATIONS TEAMS ARE EXPANDING SCOPE AND INFLUENCE

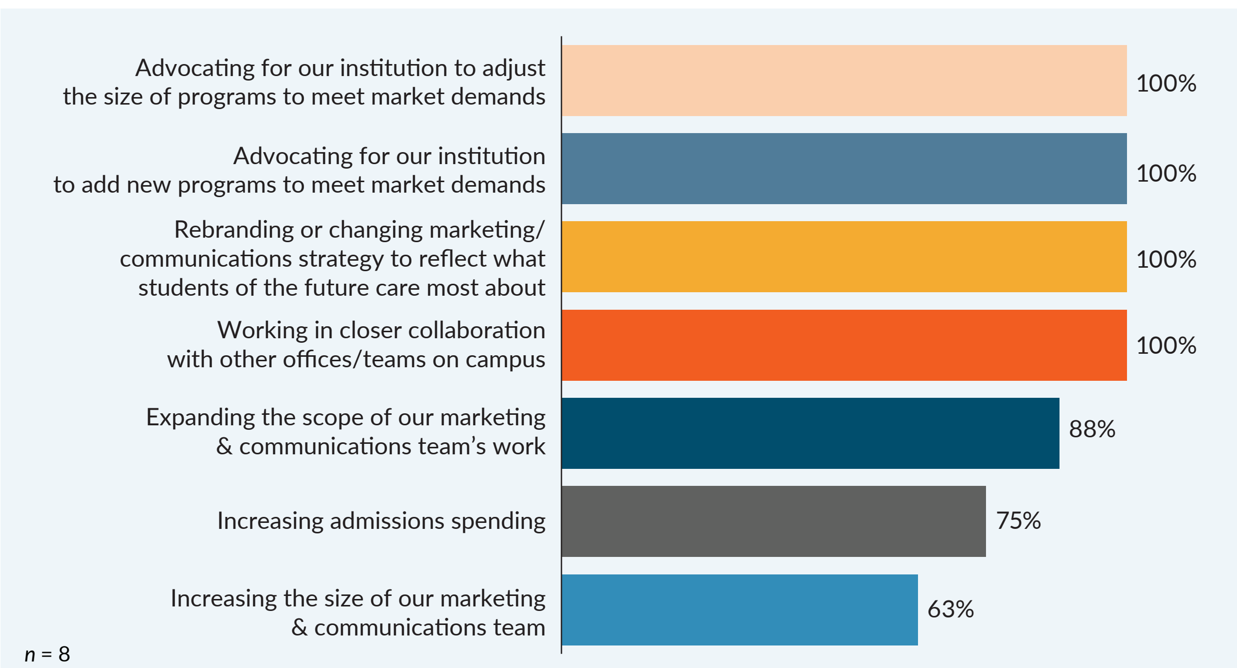
Respondents that have experienced an enrollment crisis, that are currently experiencing enrollment challenges, or that anticipate future enrollment pressures answered several questions that sought to establish an overall assessment of institutions' reactions to enrollment challenges.

Respondents appear to have taken—or are expecting to take—an "all of the above" approach to addressing enrollment challenges and their associated revenue shortfalls, reflecting a broadly comprehensive strategy that includes both program development and efforts to expand offerings aligned with market demand. One tactic that they did not all employ was increasing the size of their marketing & communications team, but this response was still selected by two out of three respondents, suggesting that institutions recognized the importance of increased marketing even when their budgets were constrained.

TECHNOLOGY FOR PERSONALIZATION

"Use of AI to be more responsive to prospective students, looking to move applicants through the pipeline efficiently and tailor the enrollment experience to each student."

Figure 9: Marketing & Communication Tactics

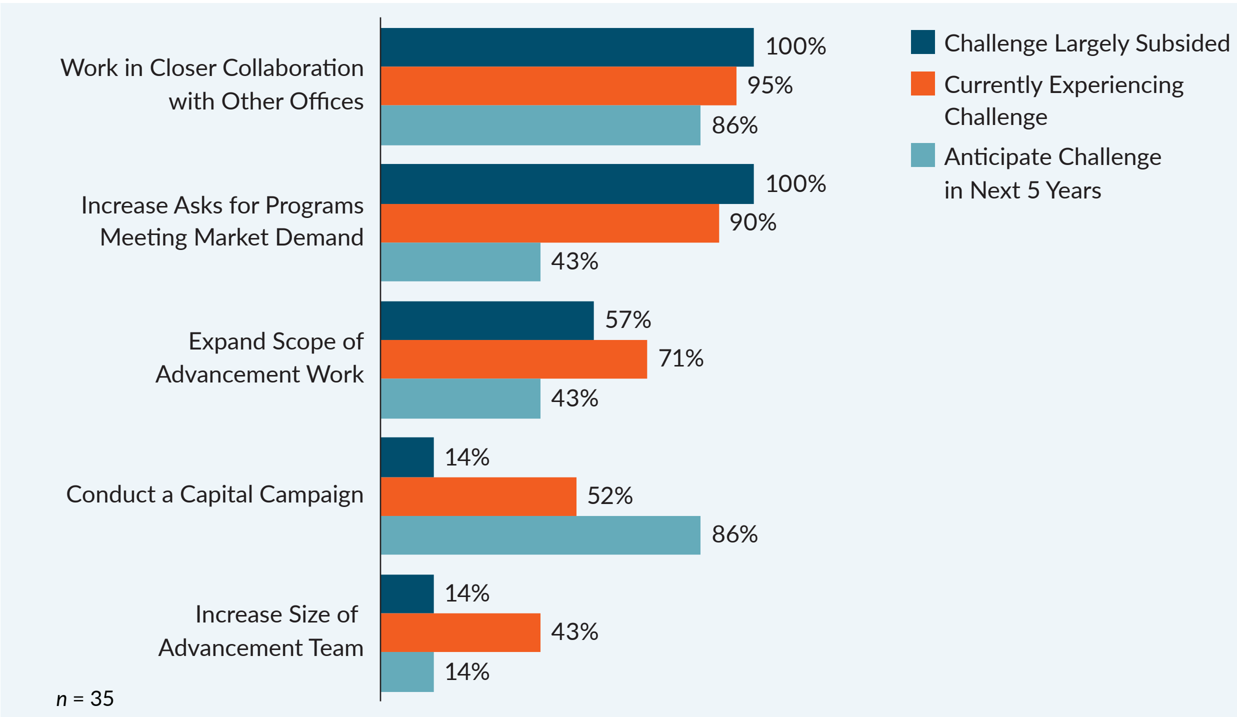


ADVANCEMENT IS EMERGING AS A STRATEGIC PARTNER IN INSTITUTIONAL RESPONSES

Respondents working in advancement were also asked to identify which strategies their teams or institutions have implemented, or are likely to implement, in response to enrollment challenges.

Because the number of respondents in this group allows for more detailed analysis, results are presented by institutional experience with enrollment challenges.

Figure 10: Strategies for Advancement Collaboration



The most popular tactics were closer collaboration with other offices and increasing solicitations for programs that meet market demand. Expanding the scope of advancement work was also a commonly used tactic, most notably among those currently in and those anticipating an enrollment crisis. Interestingly, those anticipating an enrollment crisis were most likely to plan a capital campaign, while that tactic was rarely chosen by those who had already experienced enrollment challenges that have largely subsided. Finally, it is notable that, in most cases, advancement respondents did not or do not expect to add staff to their team. This is understandable given the financial pressures that an enrollment crisis creates but may make it difficult for advancement teams to deliver the results that their institutions need.

THE EXPANDING ROLE OF ADVANCEMENT

"I think we were slightly ahead of the game in terms of… rebalancing our focus away from being predominantly a fundraising operation to one that supports international recruitment, employability, rankings, and fundraising… Some other major institutions do not have those plans yet."

In open-ended questions, respondents identified an array of additional tactics that involve collaboration across multiple roles and offices

Due to rounding, totals in tables and figures may not produce exact sums, and percentages may not equal 100.

across campus. These tactics included a focus on fundraising for scholarships, increased corporate support and partnerships, and enhanced advocacy for government funding. Survey respondents also mentioned pursuing broader institutional strategies such as new graduate and professional programs and expanded marketing. Others highlighted efforts in the areas of strategic enrollment management, student success initiatives, and student recruitment that includes alumni. Taken together, these responses suggest that addressing the enrollment challenge often mobilized all parts of the institution.

Respondents' reflections also indicate that many institutions took a thoughtful and proactive approach. At the same time, when asked what they would have done differently, several respondents noted the importance of acting earlier and more strategically, particularly in determining where to reduce costs and where to make targeted investments. These findings underscore the increasingly important role of advancement as a strategic partner in addressing enrollment challenges by securing resources, strengthening institutional relationships, and supporting broader efforts to attract, retain, and engage students.

LEARNING FROM EXPERIENCE

"The institution should have been more strategic and tactical in applying budget cuts that were required because of the declining enrollment and lost revenue. Instead, they were implemented as across the board cuts to all units' budgets, regardless of them being a revenue generator or a cost center. This has set the institution back tremendously and made recovery and improvement increasingly more difficult."

PLANNING FOR THE FUTURE

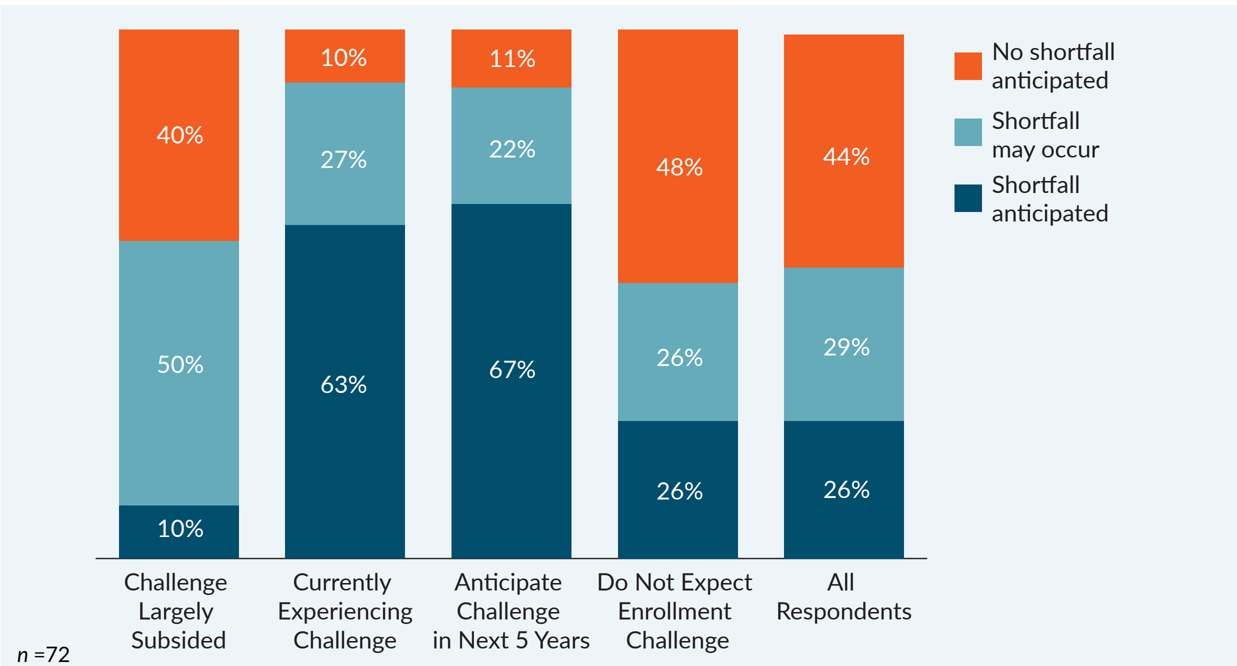
At the conclusion of the survey, all respondents—including those who do not anticipate an enrollment crisis—answered a series of questions about potential challenges facing their institutions in the years ahead.

Overall, 56% of all respondents believe that their institutions may or will experience a revenue shortfall within the next few years. However, those already experiencing or anticipating an enrollment challenge in the next five years were even more likely to expect future revenue gaps.

SHOWCASING VALUE AND IMPACTS

"Implement a university wide Student Success Initiative, which guides development and fundraising priorities to help support retention and recruitment. Help donors understand the myths behind higher education and continue to educate on the tremendous value. On the academic side, we updated the core curriculum to be relevant and meaningful to incoming students," and another institution reported that it has "increased [our] focus on outcomes (100% employment for our grads)."

Figure 11: Revenue Shortfall Anticipated



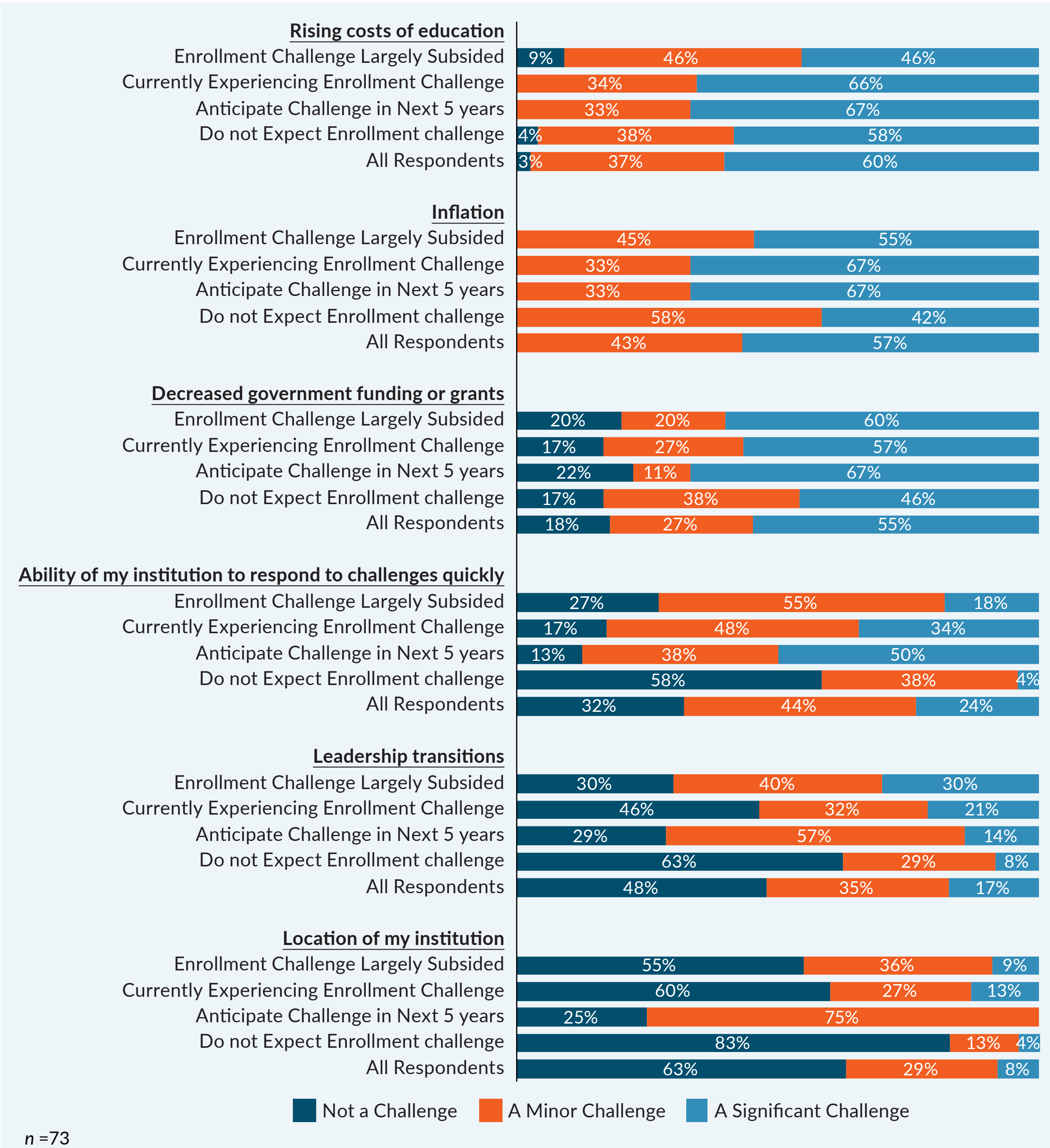
On this question, there was a difference between the U.S. and U.K. respondents: about half of the U.S. respondents expect a revenue shortfall, compared with 71% of the U.K. respondents. Fortunately, most of those expecting a shortfall believe that it will be comparatively small, with 60% of U.S. respondents and 71% of U.K. respondents anticipating less than 10%.

Respondents were also asked about the challenges their institutions expect to face in the coming years. The most widely cited concerns are rising costs of education, inflation, and decreased government funding or grants. Reflecting broader economic conditions, all respondents identify inflation as at least some level of challenge.

Due to rounding, totals in tables and figures may not produce exact sums, and percentages may not equal 100.

While most respondents were not concerned about their institution's ability to respond quickly to challenges, this was a significant concern for half of the institutions that anticipate an enrollment challenge in the next five years: only 13% of these respondents had no concerns in this area.

Figure 12: Future Challenges by Enrollment Crisis Experience



Due to rounding, totals in tables and figures may not produce exact sums, and percentages may not equal 100.

U.S. and U.K. respondents shared concern regarding inflation and the rising cost of education. Differences between U.K. and U.S. respondents should be viewed with caution because of the small number of respondents. Nonetheless, U.K. respondents were less likely than their U.S. counterparts to be concerned about decreased government funding and were more concerned about leadership transitions, the location of their institutions, and the ability of their institution to respond quickly to challenges.

Figure 13: Future Challenges by Country

	United Kingdom	United States
Rising costs of education		
Not a challenge	0%	3%
A minor challenge	29%	38%
A significant challenge	71%	59%
Inflation		
Not a challenge	0%	0%
A minor challenge	29%	45%
A significant challenge	71%	55%
Decreased government funding or grants		
Not a challenge	43%	15%
A minor challenge	14%	29%
A significant challenge	43%	56%
Ability of my institution to respond to challenges quickly		
Not a challenge	14%	34%
A minor challenge	29%	46%
A significant challenge	57%	20%
Accessibility of my institution		
Not a challenge	67%	52%
A minor challenge	17%	31%
A significant challenge	17%	17%
Leadership transitions		
Not a challenge	0%	39%
A minor challenge	29%	16%
A significant challenge	71%	45%
Location of my institution		
Not a challenge	57%	64%
A minor challenge	0%	32%
A significant challenge	43%	5%

n =73

When asked to identify any additional challenges anticipated to impact enrollment and revenue over the next several years, respondents frequently pointed to changes in government policy, particularly those likely to impact international student enrollment, as well as shifts in government support for institutional operations, student financial aid, and research.

Finally, respondents also described how their institutions are preparing for future challenges. Reported strategies include developing new and often non-traditional programs, increasing efforts to secure philanthropic funds, expanding advocacy, enhancing strategic and financial planning, and strengthening student recruitment, retention, and success initiatives. Many also noted the importance of partnerships with other institutions, businesses, and associations.

INCREASING EFFICIENCY

One institution is "partnering with local organizations that don't compete with us but serve a similar market," and another is "beginning to brainstorm things we can do to increase other revenues: leasing out portions of buildings, adjusting class schedules and credentials to better meet adult learner needs." Other reported strategies in this area include consolidation and centralization of functions, shared services, and more online academic offerings.

From these responses, it is clear that institutions are taking a variety of creative approaches in response to enrollment and other challenges confronting their institutions. Despite the difficulties currently facing education in both the U.K. and U.S., these responses provide reason for optimism in the resilience of educational institutions.

WHAT'S NEXT: IMPLICATIONS FOR STRATEGY AND PRACTICE

The responses to this survey reinforce the truth of the old adage "never let a good crisis go to waste." The insights shared by survey respondents reveal that lessons learned and strategies adopted during recent enrollment challenges can equip institutions to withstand whatever the future may bring. While shifting demographics are somewhat predictable, we also know from the survey that enrollment crises have numerous causes and that many of the precipitating factors may be difficult to predict. Preparation in advance—including the strategic use of available data—should help to reduce the duration of future challenges.

The survey also demonstrates that advancement professionals are central to the strategies that will enable schools, colleges, and universities to thrive in a tumultuous environment. Institutions are building resiliency through marketing & communication, fundraising, advocacy, investment in new programs, external partnerships, and recruitment and retention initiatives. In each of these realms, advancement will either lead the way or play an important role. The survey results reinforce that an integrated model of advancement is central to the long-term health of educational institutions.

THE ROLE OF LEADERS

One institution reported, "We have much to offer, and we are affordable. The [enrollment] cliff is what we are struggling with. We need more freshman scholarships to compete." A leader at another institution provided the rallying cry: "As the team leader for Development, I have encouraged my team to attack the challenges head on. There has never been a more important time to be a fundraiser."

Looking ahead, CASE intends to build on this initial research to investigate similar experiences in other parts of the world and to track the long-term outcomes of the strategies that respondents have been employing. These insights will help institutions prepare for, adapt to, and thrive during future disruptions that may arise.

NOTES

1 Marcus, J. (January 8, 2025). A looming "demographic cliff": Fewer college students and ultimately fewer graduates. *National Public Radio*.

2 Western Interstate Commission for Higher Education. (December 2024). *Knocking at the college door: Projections of high school graduates* (11th ed.).

3 Gardner-Cook, R. (October 27, 2025). The real demographic crisis isn't national—it's regional. *EAB*.

4 Global Nexus Education Team. (2025). Beyond the enrollment cliff: A global higher education divide. *Global Nexus*.

5 Higher Education Statistics Agency. (January 27, 2026). UK higher education student numbers fall for second year in a row. *HESA*.

6 Ramirez, E. (January 30, 2026). Decline in U.K. higher education enrollments: Causes, impacts, and solutions in 2026. *AcademicJobs*.

7 All respondents were asked to provide budget and funds received information in U.S. dollars.

CASE is the home for advancement professionals at not-for-profit education and education-related institutions. It inspires, challenges, and equips institutions to pursue success effectively and ethically. CASE defines the competencies and standards for the profession of advancement and champions their dissemination and application through its network of more than 90,000 advancement professionals at 3,000 member institutions in 80 countries.

Broad and growing communities of professionals gather under the global CASE umbrella. Currently, the CASE network includes professionals who work in alumni relations, development and advancement services, communications, fundraising, government relations, and marketing. These professionals are at all stages of their careers and may work at universities, schools, colleges, cultural institutions, or other not-for-profit organizations. In addition to the expertise of its staff, CASE uses the intellectual capital and professional talents of a community of international volunteers to advance its work. Its membership also includes many educational partners that work closely with the education sector, further enriching the CASE experience.

As the world leader in offering data about advancement outcomes provided through its CASE Insights℠ division, CASE helps professionals in the education sector achieve their objectives by making data-driven decisions. CASE provides detailed benchmarking data that enable colleges, universities, and independent schools to compare themselves with peer and aspirant institutions as well as with themselves over time. In addition, CASE publishes research reports about emerging issues and summary information relative to advancement.

Headquartered in Washington, D.C., CASE works across all continents from its regional offices in London, Singapore, and Mexico City to achieve a seamless experience for its stakeholders, particularly its members, volunteers, and staff.

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