

# Navigating the Enrollment Cliff: Strategic Responses for Nevada's Higher Education System

## Abstract

This study analyzes Nevada's higher education system amid the national enrollment cliff crisis. While Nevada's universities currently experience growth and the state benefits from continued population expansion, declining high school graduation rates and structural economic factors reveal emerging vulnerabilities. The findings indicate Nevada must implement proactive strategic reforms during this period of relative strength to ensure long-term institutional sustainability.

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# I. Executive Summary

## 1.1 Overview

The 2025 enrollment cliff—a projected decline in traditional college-age students due to reduced birth rates during the 2007-2009 Great Recession—poses significant challenges to American higher education. While national projections indicate a 15% enrollment decrease through 2029, Nevada's unique demographic and economic landscape presents both opportunities and emerging vulnerabilities requiring immediate strategic attention.

## 1.2 Nevada's Current Position: Strength with Warning Signs

Nevada's higher education system demonstrates stark institutional divergence. Four-year universities have achieved remarkable growth: UNLV (+10.3%), UNR (+23.2%), and Nevada State University (+143.7%) from 2010-2023, with both UNLV and UNR reporting record enrollments in recent years. However, all community colleges experienced severe declines (19.6-32.0%), mirroring national rural education challenges.

The state benefits from continued population growth projected through 2043, strong immigration patterns (one in five Clark County residents are foreign-born), and economic diversification beyond tourism into healthcare, education, and technology sectors. Nevada's unemployment rate of 5.5% exceeds the national average, but high labor force participation (63.0% vs. 62.4% nationally) indicates economic dynamism.

## 1.3 Critical Vulnerabilities

Despite current advantages, several indicators suggest Nevada's immunity to enrollment pressures may be temporary:

- **Declining high school graduation rates:** After reaching 84.1% in 2019, graduation rates fell to 81.6% in 2024, with volatile year-to-year changes signaling pipeline instability
- **Rural demographic decline:** Community college enrollment drops reflect broader national patterns of rural population stagnation
- **Labor market structure:** Nevada features the nation's highest concentration of jobs not requiring postsecondary credentials, weakening financial incentives for higher education
- **Revenue pressures:** Out-of-state enrollment has declined steadily since 2020, reducing high-tuition revenue streams

## 1.4 Strategic Imperatives

### 1.4.1 Short-Term Priorities (0-5 years)

- **Expand strategic online programs** in business, healthcare, education, and renewable energy to reach rural, working, and out-of-state populations
- **Restructure recruitment operations** with dedicated international and out-of-state divisions while intensifying efforts in high-growth Nevada counties

- **Enhance student success initiatives** particularly for online, first-generation, and non-traditional students to ensure enrollment gains translate to completion

#### 1.4.2 Long-Term Strategies (5-10 years)

- **Realign academic portfolios** with Nevada's evolving economy, emphasizing advanced manufacturing, logistics, hospitality technology, and construction management
- **Institutionalize industry partnerships** through formal collaboration ensuring curricula reflect emerging skill requirements with integrated experiential learning
- **Develop flexible credentialing systems** including stackable credentials and interdisciplinary pathways for rapidly changing labor markets
- **Implement comprehensive data analytics** for enrollment modeling, revenue forecasting, and evidence-based decision-making

### 1.5 Workforce Alignment and Economic Impact

Nevada demonstrates strong alignment in critical sectors, with 85% of education graduates and 81% of health profession graduates remaining in-state. However, business and engineering retention rates (70-73%) represent lost human capital in high-demand fields. Teaching program completions increased 66.2% and nursing completions grew 63.9% over the past decade, directly supporting state workforce priorities.

### 1.6 Implementation Urgency

While Nevada currently benefits from favorable demographic conditions, this advantage creates a critical but narrowing window for proactive reform. Without strategic action during this period of relative strength, the state risks accelerated population stagnation and workforce decline as converging demographic trends intensify. The current stability in urban university enrollment may create a deceptive sense of security that could delay necessary reforms until adaptation becomes more difficult and costly.

### 1.7 Recommendation

Nevada should implement comprehensive strategic reforms immediately while maintaining demographic momentum and fiscal capacity. The state's present advantages provide optimal conditions for diversifying student populations, strengthening industry alignment, and enhancing institutional capacity to ensure long-term competitive positioning in an increasingly challenging higher education landscape.

## II. Introduction: The 2025 Enrollment Cliff and Its Impact on Higher Education in Nevada<sup>1</sup>

The projected 2025 enrollment cliff has materialized as a critical challenge confronting American higher education. This demographic phenomenon, characterized by a substantial decline in traditional college-age (18-22 years) student enrollment, stems directly from the precipitous decline in birth rates during the Great Recession of 2007-2009. As this demographic shift becomes increasingly evident, its ramifications extend beyond enrollment statistics to encompass fundamental threats to institutional viability, educational quality, and workforce capacity.

The consequences of sustained enrollment decline manifest across multiple dimensions of higher education. Financially, institutions dependent on tuition revenue face unprecedented budgetary pressures, necessitating reductions in academic programs, course offerings, and educational quality. Personnel impacts include faculty and staff layoffs, while the broader economic implications encompass reduced productivity in degree-requiring industries due to workforce shortages. For smaller institutions, the stakes are existential, with complete closure representing a probable outcome absent effective intervention strategies.

This analysis examines the enrollment cliff's implications within Nevada's distinctive demographic and economic context. The state's higher education landscape comprises three four-year universities, four community colleges, and one environmental research institution, each facing unique challenges and opportunities in addressing enrollment pressures. Nevada's appeal to out-of-state and international students, combined with its evolving economic structure, provides potential pathways for mitigating significant demographic decline while maintaining higher education's centrality to economic development and workforce preparation.

### 2.1 Nevada's Higher Education Institutions

Nevada's higher education system reflects a strategic distribution of institutional missions aligned with state demographic and economic needs. The **College of Southern Nevada (CSN)** serves as the state's largest community college, distinguished by its comprehensive scheduling flexibility—offering courses during the daytime, in the evening, over the weekend, and in online formats. This accessibility, combined with the lowest tuition rates in Southern Nevada, positions the institution as a critical access point for diverse student populations across all fifty states.

The **Great Basin College** emphasizes rural higher education through its delivery of baccalaureate and associate degrees in academic, career, and technical fields. The institution's commitment to industry-specific skill development and local economic contribution reflects Nevada's geographic diversity and the distinct workforce needs of rural communities. Similarly, **Truckee Meadows Community College** integrates credit and non-credit programming designed

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<sup>1</sup> Unless otherwise noted, all study data are sourced from the Nevada P-20 to Workforce Research (NPWR) project and its partner institutions: Nevada Department of Employment, Training and Rehabilitation (DETR), Nevada System of Higher Education (NSHE), and Nevada Department of Education (NVDOE).

to prepare students for Nevada-based employment while maintaining community engagement as a central institutional priority.

**Western Nevada College** provides affordable educational pathways through both formal degree programs and informal certification support, serving students pursuing specialized professional credentials. This dual approach recognizes the diverse educational needs within Nevada's workforce development ecosystem.

Among the state's universities, **Nevada State University** prioritizes inclusive, quality education that addresses Nevada's demographic heterogeneity across several dimensions, including race, age and income. The institution's interdisciplinary approach emphasizes not just career preparation but comprehensive development of critical thinking and real-world problem-solving capabilities essential for navigating post-graduation challenges.

The **University of Nevada, Reno (UNR)** maintains its status as a premier research institution through its Carnegie R1 designation, signifying the highest level of research activity. Strategic collaborations with external partners facilitate funding diversification and academic program expansion, while partnerships with the UNR School of Medicine and Renown Health establish Nevada's first integrated health system. These relationships enable comprehensive clinical training, research programs, and healthcare access throughout the state. Additionally, UNR's collaboration with Clark County and Washoe County school districts provides college-level courses to high school students, creating essential pipelines between secondary and higher education.

The **University of Nevada, Las Vegas (UNLV)** is a top research institution, and has achieved the prestigious Carnegie R1 designation, signifying its status as a top-tier research institution recognized for the highest level of research activity. It maintains this designation by operating through six core values: 1) advancing student achievement; 2) enhancing research and scholarship; 3) developing UNLV Health; 4) stimulating socioeconomic development; 5) fostering community partnerships; 6) and promoting social justice, equity, and inclusion. These values advance the institution's strategic vision by fostering systematic resource utilization, strengthening alumni engagement, promoting community integration, and enhancing student empowerment.

The Desert Research Institute (DRI) functions as Nevada's premier non-profit environmental research organization, providing students with research positions and teaching opportunities that foster hands-on learning and professional development. Through partnerships with Nevada's colleges and universities, DRI helps students think critically about environmental challenges, by developing community-oriented and globally impactful solutions.

## 2.2 Conclusion

To address the challenges posed by declining populations, shifting demographics, and the looming enrollment cliff, Nevada's institutions must adopt innovative and comprehensive strategies. These include early engagement and recruitment efforts that reach students while they are still in secondary school, providing them with clear pathways and support as they transition to higher education. Expanding high-quality online programs can broaden access for out-of-state, international, and non-traditional students, as well as those balancing employment and

academics. Institutions must also align degree offerings and alternative education programs with the diverse interests and needs of Nevada’s changing population. Finally, initiatives such as dual enrollment programs can give students a first-hand experience of higher education and demonstrate the real-world value of academic and career preparation. By combining these efforts, institutions can create stronger incentives for prospective students to pursue higher education and ensure long-term enrollment stability.

## **III. Background**

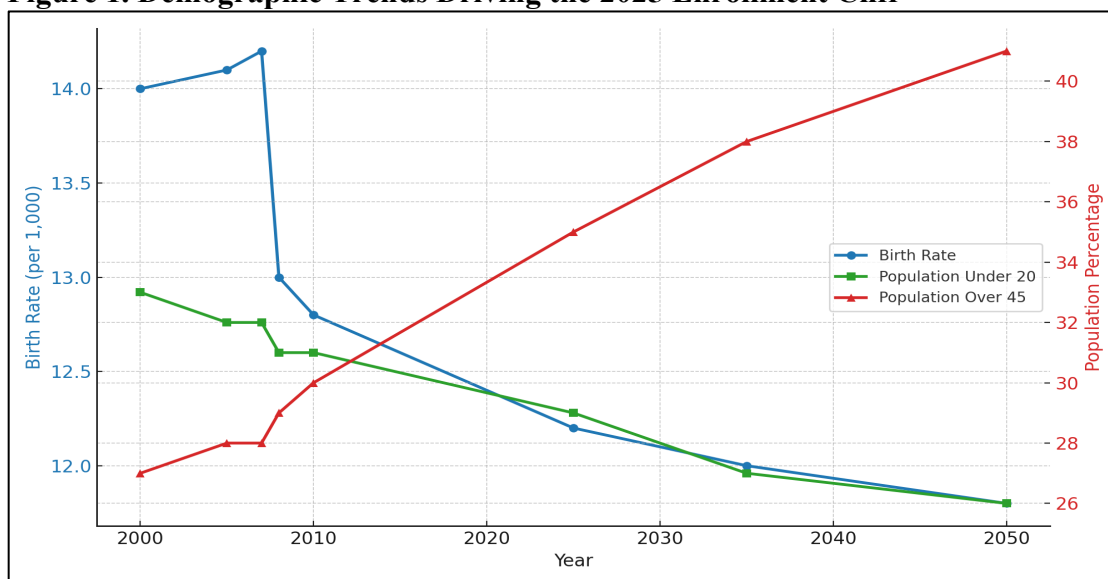
### **3.1 Enrollment Cliff and Demographic Factors**

The ‘enrollment cliff’ represents a projected decline in traditional college-aged students beginning approximately in 2025, driven primarily by reduced birth rates following the 2008 recession. Lopez (2006) identified this demographic trajectory nearly two decades prior, warning that declining fertility rates would inevitably contract the pool of college-eligible students. Campion (2020) reinforces these findings, demonstrating that demographic shifts significantly influence high school graduate transitions to higher education, with consequences extending to 2030 when fewer young adults with higher education credentials will enter the workforce.

Schuette (2023) quantifies these projections, estimating a 15 percent enrollment decrease across U.S. colleges and universities between 2025 and 2029, with disproportionate impacts on regional public institutions and community colleges due to limited capacity for rapid strategic pivoting (Campion 2020). These national enrollment trends have prompted extensive strategic planning efforts to develop effective response mechanisms.

The enrollment decline reflects broader age demographic patterns within an aging U.S. population where birth rates have not recovered since the 2008 recession (Figure 1). The 2007 birth rate peak, followed by the sharp 2008 decline creates a particularly pronounced enrollment cliff, directly reflecting the inter-year birth rate differential (Taylor 2010). Demographic projections indicate that by 2050, adults over age forty-five will comprise more than 40 percent of the population while the youth population under the age of twenty will continue to contract (Lopez 2006).

**Figure 1. Demographic Trends Driving the 2025 Enrollment Cliff**



However, demographic transformation extends beyond aging populations and declining birth rates to encompass immigration patterns that significantly influence educational pipeline stability. Immigration has historically helped offset population decline by contributing to both workforce and higher education growth, functioning as a demographic counterbalance that can moderate enrollment cliff severity. As the U.S. population ages and the younger workforce contracts, immigration remains a key factor that can slow the most severe impacts of the enrollment cliff, though its effectiveness depends on future immigration trends and policies (Burchett, 2024). The demographic equation thus involves three interconnected variables—aging, birth rates, and immigration flows—each operating at different temporal scales and regional intensities. Immigration's mitigating potential becomes particularly relevant for states with substantial foreign-born populations, where established immigrant communities create sustained educational demand through intergenerational mobility aspirations.

Critical to understanding the enrollment cliff's implications is recognizing that demographic changes produce disparate regional impacts, creating a complex mosaic of challenges and opportunities across different geographic areas. Regional variation in enrollment cliff impacts creates uneven effects across the United States, with Northeastern and Midwestern states anticipating the steepest enrollment declines while Western and Southern regions expect modest declines or growth (Schuette, 2023). Growth and stability patterns correlate strongly with immigration trends, both domestic and international. Nevada projects growth across all seventeen counties (Nevada Department of Taxation, 2024), positioning the state at an advantage, relative to national trends. However, this projected growth does not immunize Nevada against enrollment cliff effects, as states experiencing overall population growth may still encounter uneven enrollment trends across institution types and student demographics (Nevada Legislative Counsel Bureau, 2021). Nevada's current demographic advantages may prove temporary, as delayed impacts from national birth rate declines will eventually manifest even in high-growth states, necessitating proactive demographic response strategies tailored to local institutional contexts and recognition that today's growth trajectories do not guarantee tomorrow's enrollment stability.



## 3.2 Counteracting the Cliff

### 3.2.1 Online Education

In response to projected enrollment declines and demographic shifts, online education has emerged as a primary strategy for expanding access and sustaining student engagement. Contemporary traditional-aged college students increasingly value course delivery flexibility—an expectation shaped by pandemic experiences, work-school balance necessities, and technological convenience. Consequently, institutions face pressure to adopt online and blended learning models addressing both demographic and economic challenges (Betts et al., 2019).

Current online education demand is substantial, with two-fifths of students enrolled in online classes and 95% of those students indicating future online course enrollment intentions (Peck, 2025). These trends underscore the expansion of online programs as a critical strategy for student recruitment and retention from 2025 onward.

Online education strategies broaden access and enrollment opportunities while maintaining institutional competitiveness within a rapidly evolving higher education landscape. Success depends on ensuring quality and effectiveness in newly developed online programs. While online courses provide flexibility and accessibility, their effectiveness requires thoughtful integration of diverse learning tools. Incorporating live video sessions, recorded lectures, and interactive discussion forums enhance student engagement while maintaining academic rigor (Neuwirth, 2020). Additionally, robust faculty-student communication through consistent guidance and support is essential for preserving course quality and fostering meaningful connections (Stiller, 2018). Prioritizing these elements improves retention rates while motivating new enrollment through high-quality educational experiences.

Nevada actively advances online education commitments through the Nevada System of Higher Education (NSHE), which has established measurable goals for tracking enrollment growth and promoting online learning equity (NSHE, 2021). These priorities received reinforcement when NSHE identified online and hybrid course expansion as a central objective in its 2023-2027 strategic plan. NSHE positions digital delivery as essential for student success and workforce preparation, recognizing quality online education's critical role in meeting state higher education needs. By emphasizing flexibility, affordability, and accessibility, these initiatives enhance student engagement and retention while positioning Nevada to serve evolving college-age learner demands effectively.

### 3.2.2 Student Recruitment and University-Industry Alignment

The enrollment cliff's impact on U.S. higher education requires institutions to expand beyond online education to comprehensive recruitment strategy enhancement. Recruitment incentives vary by target population—international students, out-of-state students, and non-traditional students.

**International student** recruitment examples from Japan and Spain demonstrate effective approaches during demographic decline through strong support services and reliable infrastructure. International students remain underutilized in U.S. public universities, comprising only 5.6% of undergraduates (Esaki-Smith, 2024). The U.S. for Success Coalition advocates

increasing these numbers based on anticipated positive economic outcomes (Welch, 2025). International student barriers to U.S. study include "high costs, visa-processing difficulties, increased study options, and perceptions of an unwelcoming presidential administration" (Esaki-Smith 2024, n.p.). For Nevada, this indicates pathways forward through visa support emphasis, English-language programming, international partnerships, and sustainable global recruitment pipeline development.

**Non-traditional student** targeting includes individuals taking gap years or requiring full-time work during study. Unique recruitment strategies for gap year students, beyond financial incentives, emphasize belongingness and campus community strength. "By sharing student organization and association activities, universities create welcoming environments allowing potential students to envision themselves at the university" (Stanhope 2021). Working students lacking time for campus activities due to income obligations benefit from financial aid incentives and assistance with managing external work responsibilities (Han et al. 2025). However, this extends beyond working students, as any student experiencing financial difficulties demonstrates increased persistence when institutional grants, waivers, or scholarships are available (Han et al. 2025).

Recruitment alone proves insufficient for student engagement and retention without retention-focused strategies reflecting student future aspirations. Short-term outreach incentives require integration into blended models with long-term degree program and industry demand alignment (Pavuluri et al. 2019). This provides students with clear post-graduation plans, increasing enrollment and retention likelihood through visible degree-to-employment pathways. While beneficial for all student types, this approach particularly supports **out-of-state student** recruitment, as students relocating to new states must evaluate long-term degree benefits.

Consequently, Nevada's institutions must demonstrate that Nevada enrollment provides both short-term financial advantages and strong post-graduation job prospects. Framing Nevada as a location where education directly connects to opportunity can increase out-of-state student confidence in choosing Nevada over alternative states. Nevada's higher education system has begun incorporating university-industry alignment strategies, with the Nevada System of Higher Education planning report (2022) outlining growing emphasis on program realignment and workforce engagement, suggesting recruitment shifts toward labor market relevance.

Institutions implementing flexible, inclusive, and intentional pipelines beyond traditional recruitment methods demonstrate superior preparation for enrollment cliff challenges. For Nevada, where the demographic landscape is shifting rapidly, these strategies could create long-term stability.

## IV. Nevada's Unique Demographic and Economic Landscape

Nevada's demographic composition differs from that of other states severely impacted by the enrollment cliff due to its continued population growth. Projections indicate sustained growth in most counties through 2043, with Clark County expected to experience the largest gains (Nevada Department of Taxation, 2024). While statewide growth is influenced by birth rates, Nevada's low birth rates are offset by domestic and international migration patterns. In-migration leads researchers to project that Clark County's population will reach 3.334 million by 2060 (UNLV

Center for Business and Economic Research, 2024), with college-aged individuals expected to peak in 2029 before gradual decline. Consequently, it is anticipated that Nevada will face similar age-based enrollment pressures, but with delayed and potentially more gradual impacts.

International migration significantly influences Nevada's demographic profile, as the state maintains a foreign-born population share exceeding the national average (American Immigration Council 2023). In Clark County, immigrants constitute one in five residents, contributing substantially to construction and hospitality industries that anchor Nevada's economic growth and stability. Burchett (2024) argues that immigration may serve as a demographic counterbalance, thereby moderating college enrollment shifts. As immigrant families establish residency for employment and send children to K-12 schools and institutions of higher education, long-term enrollment stability opportunities emerge through stronger K-12 pipelines and increased recruiting efforts targeting young adults from immigrant families who may not initially perceive college as a viable pathway.

This demographic dynamic reflects Nevada's broader transformation into one of the nation's most racially and ethnically diverse states, where diversity intersects with first-generation student status, K-12 educational pathways, and economic opportunity structures. Hispanic/Latino residents comprise nearly 29% of the state's population (U.S. Census Bureau 2020), a demographic composition reflected in higher education enrollment patterns where approximately 33% of UNLV undergraduates qualify for Pell Grants, indicating substantial representation from economically disadvantaged and underrepresented backgrounds (Thymianos et al. 2025; Nevada Legislative Counsel Bureau 2021). However, Talbert (2012) identifies first-generation and minority students—populations that could potentially offset enrollment declines—face persistent barriers to higher education access and completion. These obstacles necessitate targeted financial support through grants and scholarships to realize their enrollment potential. Additionally, Nevada confronts significant college readiness gaps that foreshadow continued enrollment disparities. While these demographic and educational challenges pose immediate concerns, they simultaneously present strategic opportunities for enrollment stabilization through targeted interventions addressing the specific needs of Nevada's diverse population base.

Nevada's economy, shaped by tourism, logistics, and hospitality sectors, often overshadows expanding areas like healthcare, technology and manufacturing. Increasing demand in these areas presents opportunities for institutions to align programs with Nevada's evolving industrial landscape. Workforce Connections (2024) highlights state efforts creating training plans matching employer needs—pointing to ten thousand job openings in southern Nevada alone (in 2024). Growing demand for technology, business, and public health degrees in urban areas (UNLV CBER 2024) suggests that aligning degree offerings with this evolving economic landscape could stabilize enrollment by providing students clearer employment pathways.

The enrollment cliff poses serious challenges for higher education nationally, but Nevada possesses unique opportunities to overcome potential obstacles. Population growth may delay enrollment cliff effects without providing immunity; therefore, understanding aging trends, low birth rates, and persistent college readiness gaps can facilitate solution development. Nevada's growing diversity, strong in-migration patterns, and evolving economy offer effective response pathways. Addressing Nevada's demographic characteristics provides intuitive enrollment cliff responses, while nationally proven strategies offer additional support. Surviving the enrollment cliff requires combined strategies encompassing not merely recruitment, but recruitment paired

with retention, workforce alignment, and expanded access through flexible online education. Institutions are already implementing these strategies, with the University of Nevada, Reno achieving record enrollment growth in 2023 after expanding dual enrollment, financial aid, and targeted outreach to underrepresented groups (Trent, 2023). Likewise, the University of Nevada, Las Vegas reported its highest enrollment in the university's 67-year history in fall 2024 (UNLV, 2024). Continuing these proactive steps throughout Nevada's higher education system will enhance institutional adaptability, accessibility, and sustainability amid long-term demographic shifts.

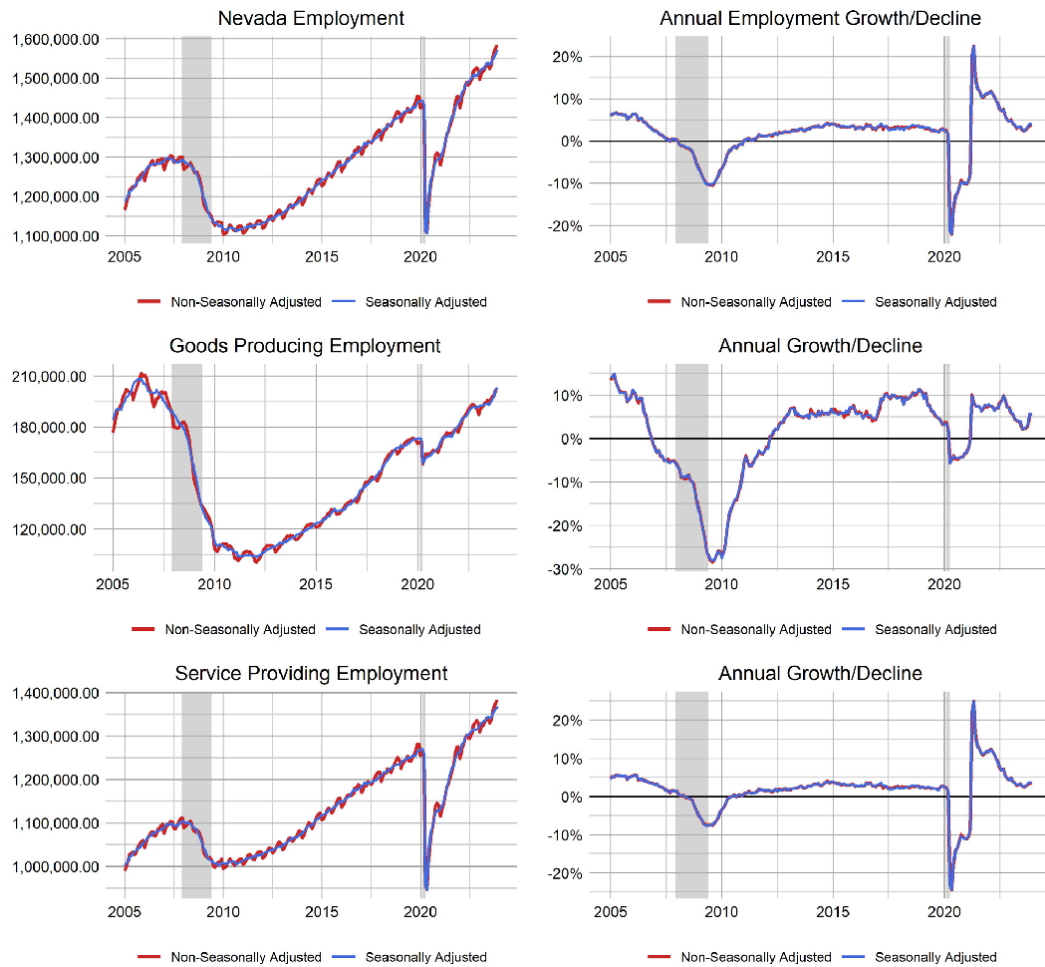
## **V. Nevada's Workforce: Trends, Challenges, and Opportunities**

Nevada's higher education system operates within a landscape defined by unique economic forces and demographic shifts. While the state benefits from growing population and post-pandemic economic recovery, it confronts complex challenges threatening future enrollment. Unlike the national enrollment cliff driven primarily by declining birth rates, Nevada's challenges require understanding within the specific context of its labor market structure, performance divergence between four-year universities and community colleges, and demographic headwinds demanding micro-level, data-driven analysis.

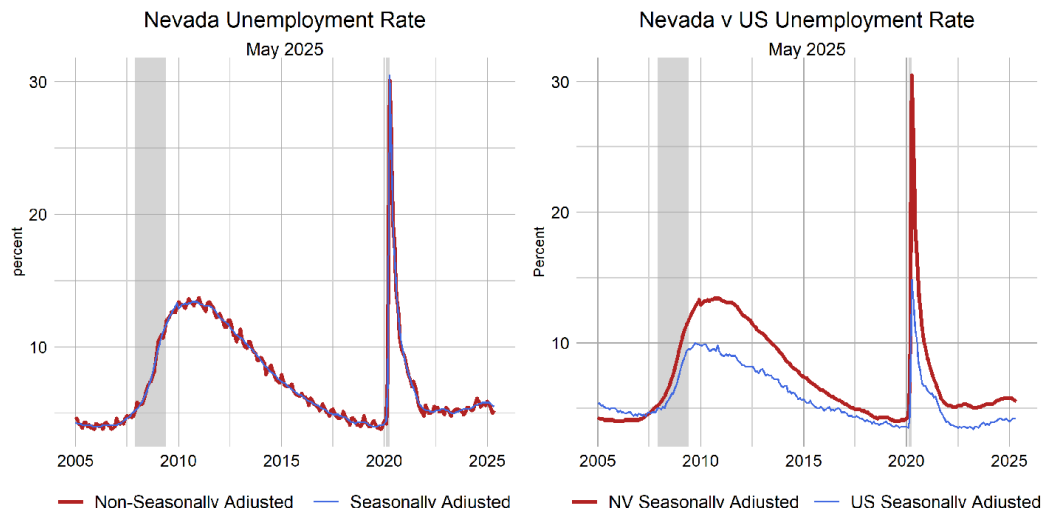
Understanding Nevada's labor market dynamics—particularly the demand-side of the employment equation—provides essential context for assessing higher education's role in workforce development and enrollment sustainability. Nevada's labor market has experienced encouraging post-pandemic recovery (Figure 2) while retaining unique structural characteristics that directly influence the value proposition of higher education. As of May 2025, the state's unemployment rate stood at 5.5%, representing modest improvement but remaining among the nation's highest, suggesting persistent labor market inefficiencies (Figure 3). Conversely, the labor force participation rate of 63.0% surpasses the national average of 62.4%, indicating strong worker engagement despite elevated unemployment levels (Figure 3). These seemingly contradictory indicators—high unemployment coupled with high participation—suggest a labor market characterized by job-skill mismatches and structural transitions that higher education institutions must navigate when designing programs and setting enrollment expectations.

Nevada's unemployment complexity extends beyond job loss to include voluntary departures and new labor force entrants, indicating worker confidence in employment prospects. However, unemployment distribution reveals significant demographic disparities (See Appendix-Figure 1). Workers aged 25-34 represent the largest unemployed group, while ethnic and racial minorities experience disproportionate impacts (Table 1). Black/African American residents account for over 24% of unemployed individuals, while Hispanic or Latino residents comprise above 32% (Table 1). These statistics demonstrate needs for targeted workforce initiatives and educational support.

**Figure 2. Nevada: Pre-Pandemic Labor Market Overview, 2005-2020**



**Figure 3. Unemployment Rate: Nevada in Comparison to the U.S. (May 2025)**



**Table 1. Unemployment Rate by Race, Nevada (2023)**

Race	Unemployment Rate (Jan 2023)	% of Unemployed
White	55,043	62.15%
Black/African American	21,355	24.11%
Hispanic/Latino (Ethnicity)	28,584	32.27%
Asian	6,797	7.67%
American Indian or Alaskan Native	2,623	2.96%

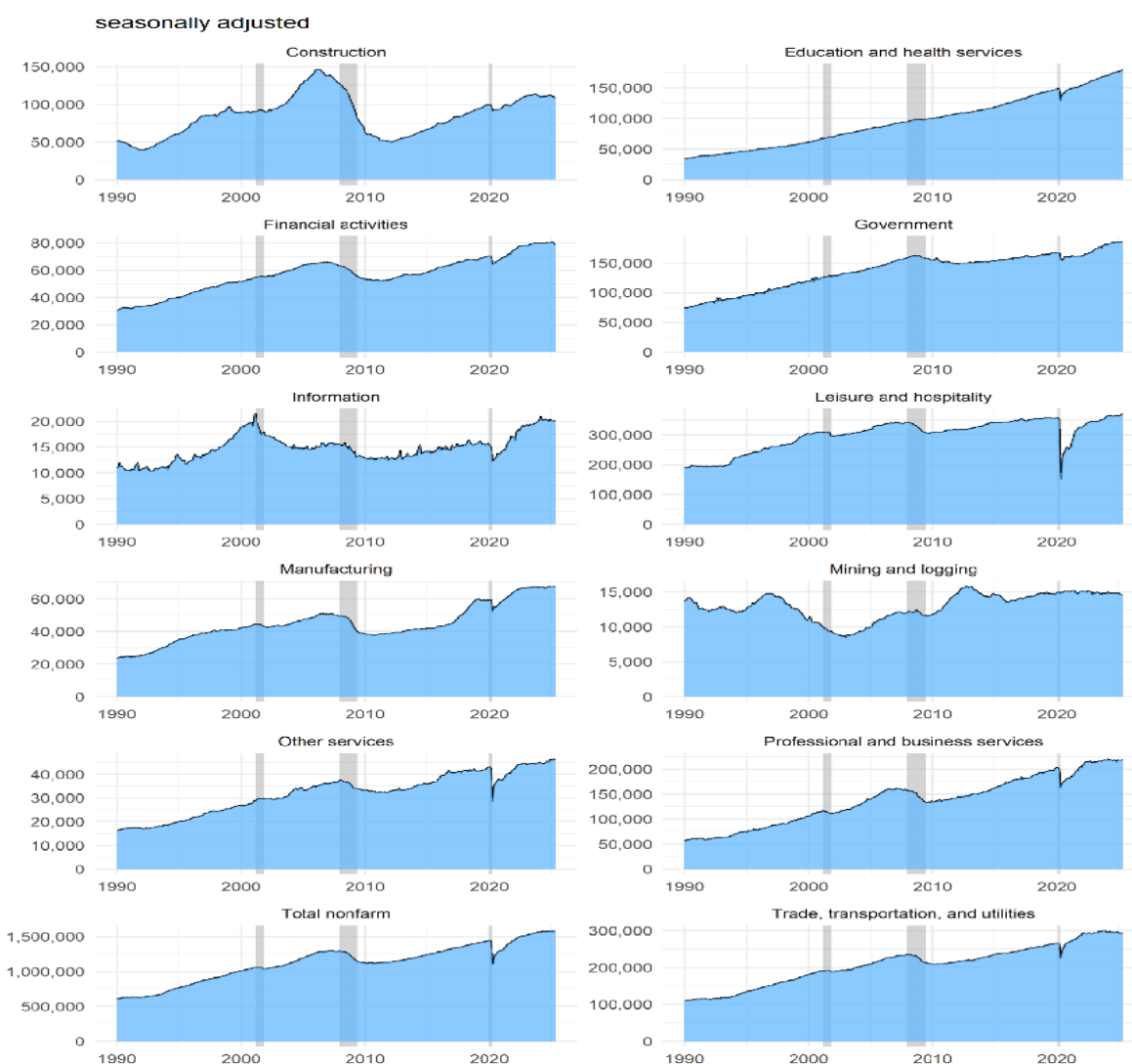
Source: Lightcast, Economy Overview, Q2 2023, pp. 6, 9

Nevada’s industrial structure is highly concentrated, with **Accommodation** and **Food Services** remaining the state’s largest employer. Historically, Nevada’s economy has been defined by its reliance on **Construction** and **Leisure and Hospitality**—two sectors known for their volatility (Figure 4). Construction experienced a dramatic boom peaking in 2006, followed by a sharp collapse during the Great Recession, from which full recovery has yet to occur. Similarly, Leisure and Hospitality—the state’s signature industry—follows cyclical patterns, though less extreme. The sector experienced the state’s steepest job losses during the 2020 pandemic, followed by a rapid rebound, illustrating both its enduring economic importance and its vulnerability to external shocks. Together, these sectors have long served as engines of Nevada’s growth while simultaneously driving economic instability (Figure 4).

In contrast, **Education and Health Services** and **Professional and Business Services** represent the more stable side of Nevada’s economy. These sectors have demonstrated consistent, long-term growth, providing balance to the state’s historically volatile industries. Education and Health Services have expanded steadily for three decades, barely slowing during the 2008 recession and experiencing only a minor dip in 2020 (Figure 4). This sustained upward trend

reflects a structural shift in the state’s economic foundations toward essential, skills-based industries. Similarly, while Professional and Business Services exhibit some cyclical behavior, they have grown well beyond pre-2008 levels and continue a strong upward trajectory.

**Figure 4. Nevada: Industry Employment Trends, 1990-2020**



Post-pandemic recovery has been uneven across sectors. While most industries have surpassed pre-pandemic employment levels, Leisure and Hospitality has lagged behind despite its central role in Nevada’s economy. Construction and Professional and Business Services have posted robust job gains since February 2020, yet Leisure and Hospitality remains thousands of jobs below its pre-pandemic peak (Figure 5). By contrast, Education and Health Services has emerged as the state’s leading job creator, adding approximately 7,500 jobs over the past year—far outpacing Leisure and Hospitality, which added about 2,200 jobs (Figure 5). This growth signals not just recovery, but a structural transformation toward a more resilient, diversified economy. Expansion in this non-discretionary sector helps buffer Nevada from tourism-related volatility while driving sustained demand for highly skilled workers, including nurses, medical technicians, and educators. For Nevada’s higher education institutions, this creates a compelling

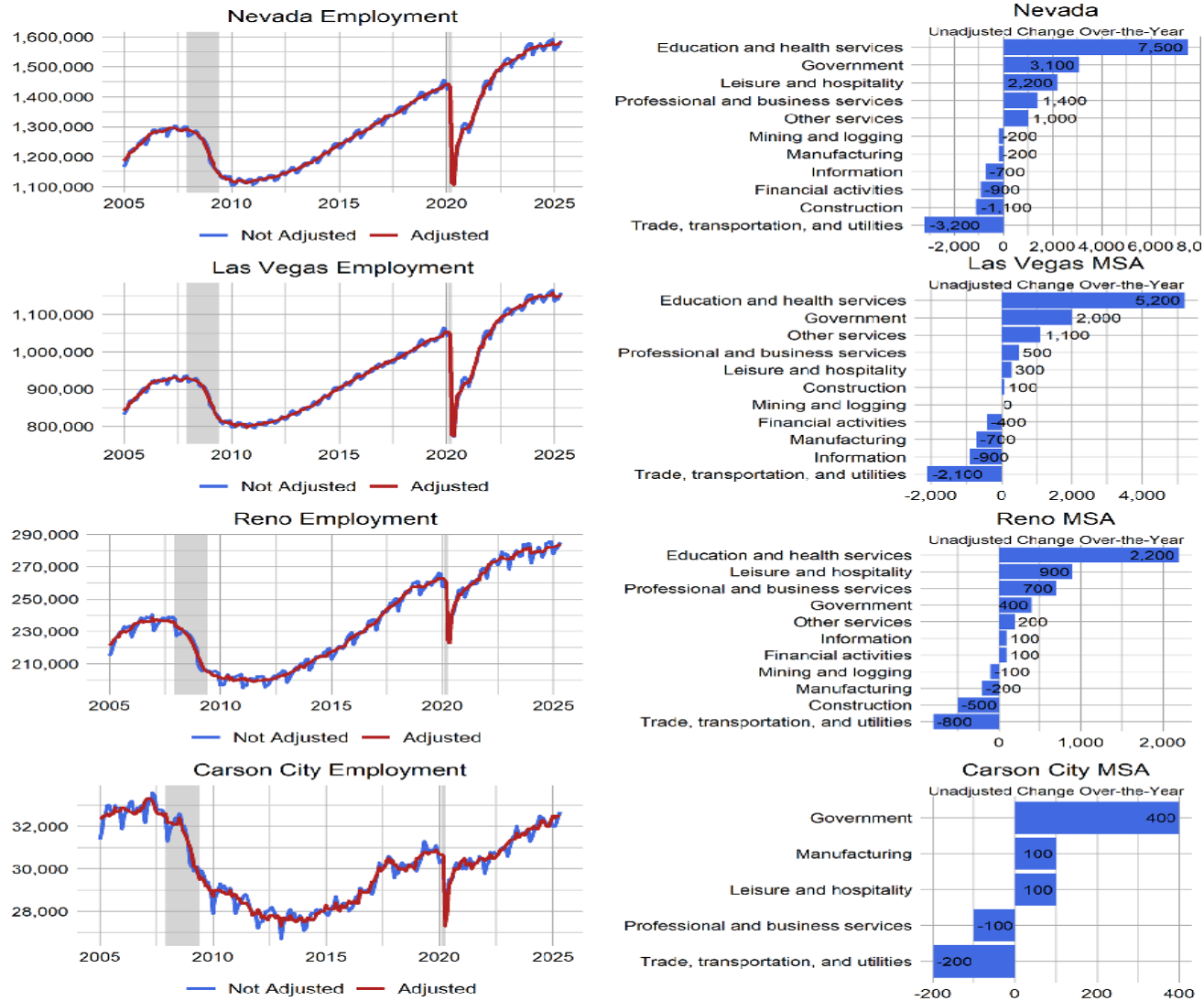
opportunity: by aligning degrees and credentials with these workforce needs, institutions can strengthen their value proposition and counteract enrollment cliff concerns.

Meanwhile, the **Trade, Transportation, and Utilities (TTU)** sector has cooled sharply following the pandemic-era logistics boom. With approximately 3,200 job losses—concentrated in the Las Vegas and Reno metropolitan areas—this decline reflects the normalization of consumer demand and stabilization of supply chains (Figure 5). The resulting workforce disruptions present a strategic opening for Nevada’s community colleges and universities to design targeted retraining and upskilling programs, turning displaced workers into prospective students and translating labor market challenges into enrollment growth potential.

Finally, Nevada’s economy varies significantly across regions (Figure 5). Statewide trends are heavily shaped by the Las Vegas metropolitan area, where growth is driven primarily by Education and Health Services (+5,200 jobs) and Government (+2,000 jobs). In contrast, the Reno-Carson City region displays a more diversified profile. Reno has experienced strong healthcare gains (+2,200 jobs), stable Leisure and Hospitality growth (+900), and robust expansion in Professional and Business Services (+700). Carson City remains uniquely influenced by its role as the state capital, with Government employment (+400) leading local job growth. As such, regional divergence provides critical strategic planning insights. For Southern Nevada, this necessitates continued healthcare and education pipeline scaling (Figure 5). While, for Northern Nevada, opportunities exist supporting balanced program combinations in professional services, advanced manufacturing, and hospitality management (Figure 5). Consequently, these regional dynamics underscore the need for tailored higher education and workforce strategies to meet Nevada’s diverse economic realities.



Figure 5. Nevada Labor Market Overview, 2025 (May)



## VI. Nevada's Institutions of Higher Education: Enrollment Trends and Opportunities for Growth

### 6.1 Divergent Enrollment Trends Across Institutional Types

Enrollment analysis reveals stark contrasts across NSHE institutions. Overall system enrollment has not recovered to 2010 levels, when Great Recession-driven unemployment prompted increased higher education participation. However, this system-wide stagnation masks dramatic institutional divergence. Since 2010, four-year universities have experienced substantial growth while community colleges have suffered severe enrollment declines of 20–30% (Table 2).

**Table 2. NSHE Fall Enrollment by Institution, % Change 2010-2023**

Institution Name	Institution Type	% Change (2010 to 2023)
UNLV	4-Year University	+10.3%
UNR	4-Year University	+23.2%
NSU	4-Year University	+143.7%
CSN	Community College	-32.0%
GBC	Community College	-20.5%
TMCC	Community College	-20.5%
WNC	Community College	-19.6%

As Table 2 illustrates, during the 2010-2023 period, UNLV experienced 10.3% growth, UNR experienced 23.2% growth, and Nevada State University (NSU) achieved a remarkable 143.7% growth. Conversely, all of NSHE's community colleges experienced substantial declines. The College of Southern Nevada (CSN) reported a 32.0% decline in enrollment, Great Basin College experienced a 20.5% decline, Truckee Meadows Community College recorded a 20.5% decline as well, and Western Nevada College experienced a 19.6% decline.

These divergent enrollment patterns reflect underlying structural challenges within Nevada's educational and economic landscape that disproportionately affect different institutional types and student populations. Foremost, a primary challenge for Nevada's higher education system is the state's labor market, which features the nation's highest concentration of jobs that do not require postsecondary credentials. This economic reality weakens financial incentives for higher education pursuit and helps explain community college enrollment struggles, as potential students perceive viable employment paths without degrees. Labor force participation data supports this pattern, showing Nevada's participation rates are highest for individuals with high school diplomas or some college experience, but fall below the 20th percentile for bachelor's degree holders or higher. This suggests weaker relative economic advantages for degree holders in Nevada when compared to other states.

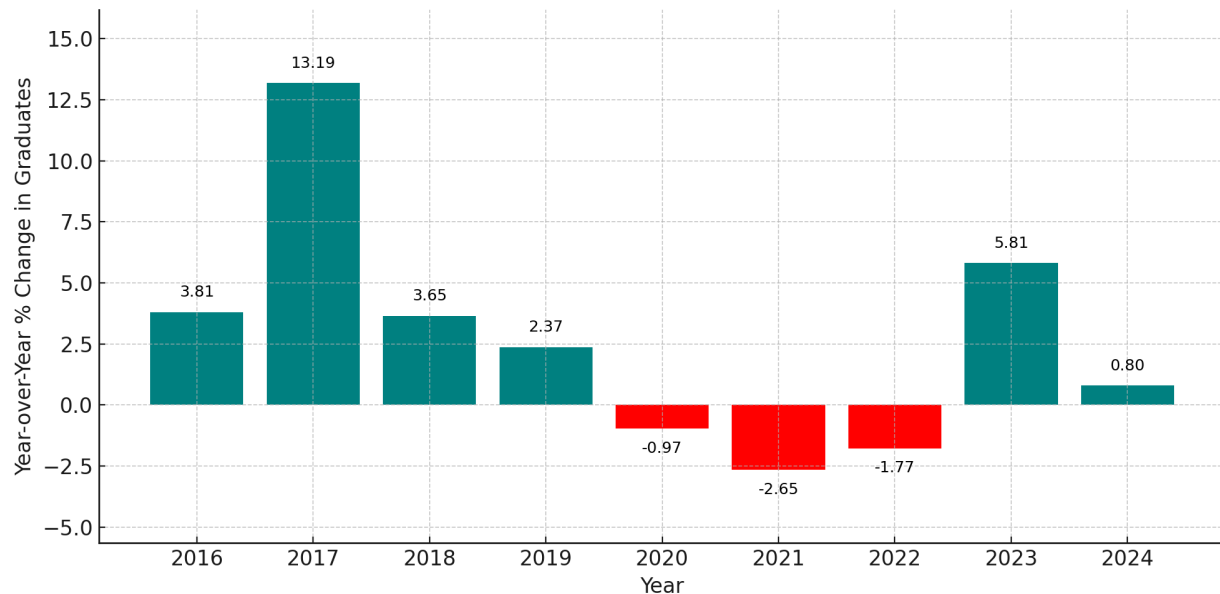
## 6.2 Demographic Trends and Educational Pipelines

Demographic patterns across Nevada are closely tied to future college enrollment. Population growth and high school graduation rates vary widely across the state's urban and rural areas, directly influencing the pipeline of students entering higher education. Urban counties such as Clark and Washoe consistently produce the highest numbers of high school graduates, while rural counties experience more volatility or decline, reflecting stagnant or shrinking youth populations (See Appendix-Figure 8).

Between 2016 and 2019, the number of Nevada high school graduates grew consistently, highlighted by a sharp 13.2 percent increase in 2017. However, this upward trend reversed during the pandemic years. Graduation numbers declined by 0.97 percent in 2020, followed by steeper drops of 2.65 percent in 2021 and 1.77 percent in 2022. A partial rebound occurred in 2023 with a 5.81 percent increase, but growth slowed again to just 0.80 percent in 2024.

These fluctuations create uncertainty for future higher education enrollment, particularly in rural regions where youth out-migration continues to shrink the population base. Strengthening the pipeline between K–12 schools and higher education will be critical to stabilizing feeder populations and offsetting the effects of the impending enrollment cliff.

**Figure 6. Nevada: Annual Percentage Change in the Number of Nevada High School Graduates, 2016-2024**



## 6.3 External Enrollment and Financial Pressures

In addition to internal enrollment challenges, external factors such as out-of-state and international student enrollment trends, the expansion of online education, and tuition revenue stability play a pivotal role in an institution's ability and capacity to recruit and retain students. These dynamics directly influence enrollment levels and, by extension, institutional solvency, and overall financial health.

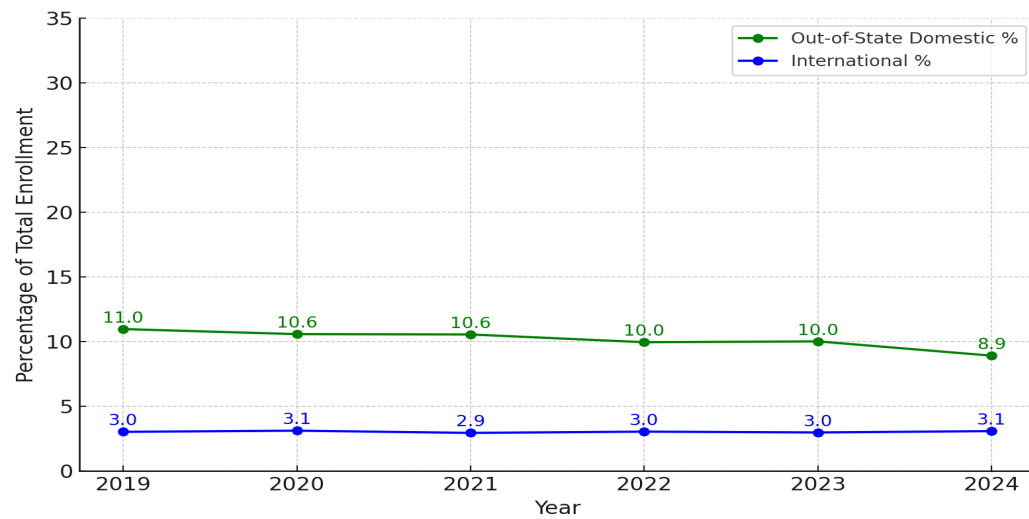
While comprehensive student enrollment figures by residency are only available for UNLV and UNR, the data indicate that these two institutions alone enroll the majority of Nevada's international and out-of-state students. This concentration reflects their status as the state's largest research universities and primary destinations for nonresident populations due to their size, program offerings, and national reach.

Figure 7 and Figure 8 illustrate student enrollment patterns from 2019 to 2024 and show a steady decline in out-of-state enrollment, with only a modest rebound beginning in 2023. By contrast, international student enrollment has remained stable to the point of stagnation, with very little growth or fluctuation, even amid pandemic-related disruptions. These shifts have important financial implications. Both out-of-state and international students are high-tuition-paying groups, but the erosion of out-of-state enrollment has weakened a key revenue stream for Nevada's higher education system. While international students have provided a more consistent source of tuition revenue, their stagnant numbers offer limited opportunity to offset the financial losses associated with declining out-of-state enrollment. However, online education offers NSHE institutions an effective way to recruit and retain a broader range of students, including those from out-of-state and based internationally.

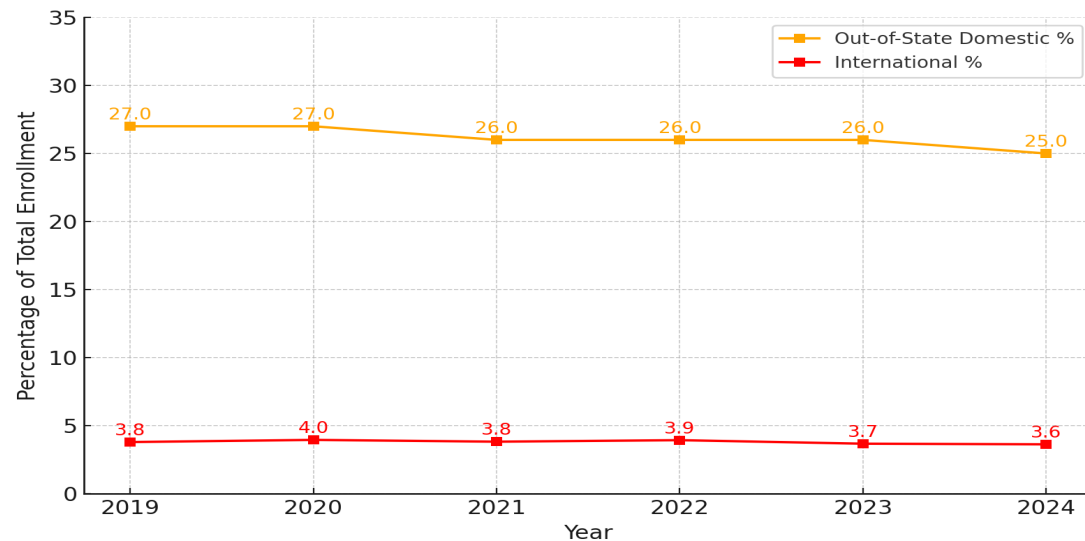
Online education has fundamentally reshaped how higher education is delivered in Nevada. Online enrollment rose steadily from 2013 to 2019, spiked dramatically during the pandemic year of 2020, and has remained well above pre-pandemic levels (Figure 9). This suggests a permanent shift in student preferences, particularly among working adults, rural students, and other non-traditional learners.

To counteract the pressures presented by declining out-of-state and stagnant international enrollments, Nevada institutions must continue to expand high-quality online degree programs to reach underserved populations and individuals who cannot access traditional, in-person formats. Online education must also be integrated into financial planning as a strategy for diversifying revenue and offsetting tuition losses from declining domestic enrollment. Recruitment strategies should include intentional efforts to attract international students, whose enrollment provides stability and resilience in the face of shifting domestic trends.

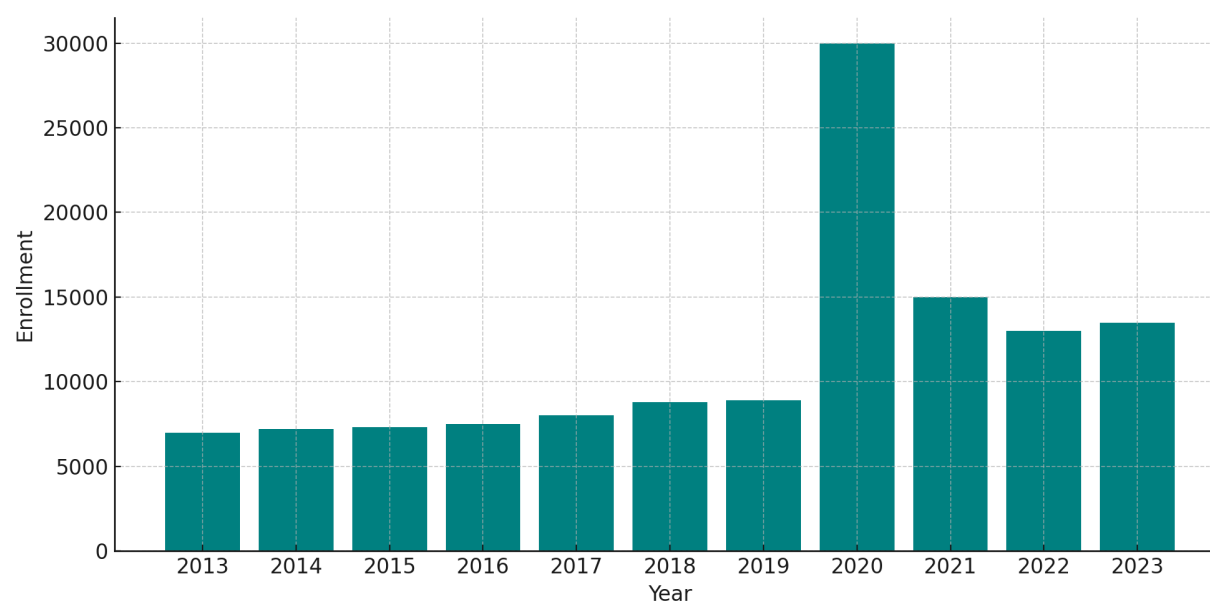
**Figure 7. Enrollment Trends for Out-of-State and International Students at UNLV, 2019-2024**



**Figure 8. Enrollment Trends for Out-of-State and International Students at UNR, 2019-2024**



**Figure 9. Nevada: Online Student Enrollment Across NSHE Institutions, 2013-2023**



## 6.4 Graduate Production and Workforce Alignment

Despite enrollment and financial challenges, NSHE has made significant progress in graduate production, especially in fields that directly support Nevada’s workforce needs. Over the past decade, completions in teaching programs increased by 66.2%, while nursing completions grew by 63.9%. Retention of these graduates within Nevada is high, with 85% of education graduates and 81% of health professions graduates employed in-state one year after graduation (Table 3). This demonstrates strong alignment between NSHE’s degree production and the state’s critical labor market demands.

However, retention rates are lower in other key areas, including business and engineering. In these fields, only 70 to 73% of graduates remain in Nevada, representing a loss of human capital in areas with strong national demand (Table 3). Labor market analysis confirms that management and healthcare practitioner roles are top workforce priorities, highlighting the importance of maintaining and expanding degree pipelines in these sectors.

**Table 3. 2020-2021 NSHE Graduates Working in Nevada**

Field	Employed in Nevada**
Education (CIP 13)	85.8%
Health and Related Health Professions (CIP 51)	81.2%
Engineering (CIP 14)	73.2%
Business, Management, Marketing (CIP 52)	70.6%

\*\*Percent employed in Nevada in at least one of the four quarters immediately following graduation.

## VII. Recommendations

### 7.1 Current Enrollment Pressures and Demographic Challenges

Nevada's institutions of higher education have experienced uneven enrollment trends shaped by the state's geographic and demographic landscape. Four-year universities, predominantly located in Nevada's metropolitan areas and benefiting from the economic advantages of urban centers like that of Clark County and Washoe County, have demonstrated sustained enrollment growth (Table 2). Conversely, the community college sector, which serves as the primary postsecondary access point for Nevada's rural and geographically dispersed populations, has experienced severe and persistent enrollment declines that mirror broader patterns of rural demographic decline observed across the United States (Table 2).

Recent demographic trends highlight the complexity of these challenges. Nevada has experienced significant volatility in high school graduate production, with substantial growth peaks in 2017 (13.19%) and modest gains in 2016, 2018, and 2019 (Figure 7). However, the state experienced consecutive declines from 2020 to 2022, with negative growth rates in 2021 and 2022. This pattern demonstrates the fragility of Nevada's high school graduate pipeline and aligns with regional demographic projections indicating an approximate 4% decline in high school graduates over the next decade (Western Interstate Commission for Higher Education, 2022). These trends threaten future enrollment capacity, tuition revenue stability, and the skilled workforce pipeline necessary for sustained economic growth.

To address these demographic and enrollment challenges, Nevada's higher education institutions require comprehensive structural and strategic adaptations. The following evidence-based recommendations are organized by implementation timeline to ensure both immediate stabilization and long-term sustainability.

### 7.2 Short-Term Strategies (0-5 years)

- **Expand strategic online program offerings** in fields aligned with state economic priorities including business, healthcare, education, and renewable energy, specifically targeting rural populations, working adults, and non-traditional students within Nevada while developing capacity to attract out-of-state learners.
- **Invest systematically in online education infrastructure** through comprehensive faculty development for digital pedagogy, enhanced virtual student support services, and strengthened instructional design capacity to ensure program quality and institutional competitiveness.
- **Restructure institutional outreach and recruitment operations** to optimize dual functions: intensive recruitment efforts in high-growth Nevada counties and development of specialized out-of-state and international recruitment divisions with dedicated resources and expertise.
- **Enhance comprehensive student success initiatives** particularly for online, first-generation, and non-traditional student populations, ensuring that enrollment increases translate into sustained academic progress and degree completion through targeted advising, mentoring, and support services.

### 7.3 Long-Term Strategies (5-10 years)

- **Systematically realign academic program portfolios** with evolving workforce demands by expanding offerings in high-growth economic sectors including advanced manufacturing, logistics and supply chain management, hospitality, technology, and construction management.
- **Institutionalize industry-education partnerships** through formal collaboration with employers and regional economic development agencies to ensure program curricula reflect emerging skill requirements while integrating experiential learning components such as internships, apprenticeships, and industry-recognized certifications.
- **Develop flexible credentialing systems** emphasizing stackable credentials, micro-credentials, and interdisciplinary degree pathways that provide students with adaptive capacity for rapidly evolving labor markets and career transitions.
- **Establish coordinated system-wide recruitment infrastructure** through shared resources for international and out-of-state outreach, enabling individual institutions to achieve recruitment scale and efficiency while avoiding redundant competition.
- **Implement comprehensive data analytics and planning systems** capable of modeling enrollment patterns, revenue flows, and demographic pressures to support evidence-based decision-making across faculty hiring, program development, capital investment, and financial aid allocation.
- **Institutionalize systematic scenario planning processes** with annual assessment cycles that inform strategic decisions on resource allocation, program prioritization, and institutional positioning within Nevada's evolving higher education landscape.

### 7.4 Implementation Framework and Final Thoughts

Successful implementation of these strategies requires coordinated action across institutional, system, and state levels. While Nevada's public higher education system currently benefits from favorable demographic conditions, with major urban universities experiencing sustained enrollment growth rather than the enrollment cliff effects challenging institutions in other states, several indicators suggest this advantage may be more fragile than it appears. Rural institutions and community colleges within Nevada are already experiencing declining student enrollments reflected nationwide, and the state's falling high school graduation rates may signal an impending population decline that is closer than anticipated and will inevitably affect higher education enrollment.

Nevada's unique labor market structure, where college degrees are not consistently tied to upward economic mobility due to the state's concentration of jobs not requiring postsecondary credentials, will likely exacerbate these demographic pressures. Without strategic action during this period of apparent strength, Nevada risks accelerated population stagnation, workforce decline, and diminished economic competitiveness as these converging trends intensify. The current stability in urban university enrollment creates a deceptive sense of security that could delay necessary reforms until demographic and economic realities make adaptation more difficult and costly.

The state's present population growth and institutional capacity provide an increasingly narrow window for implementing comprehensive reforms that can counteract these emerging challenges. By working proactively now to diversify student populations through targeted recruitment,



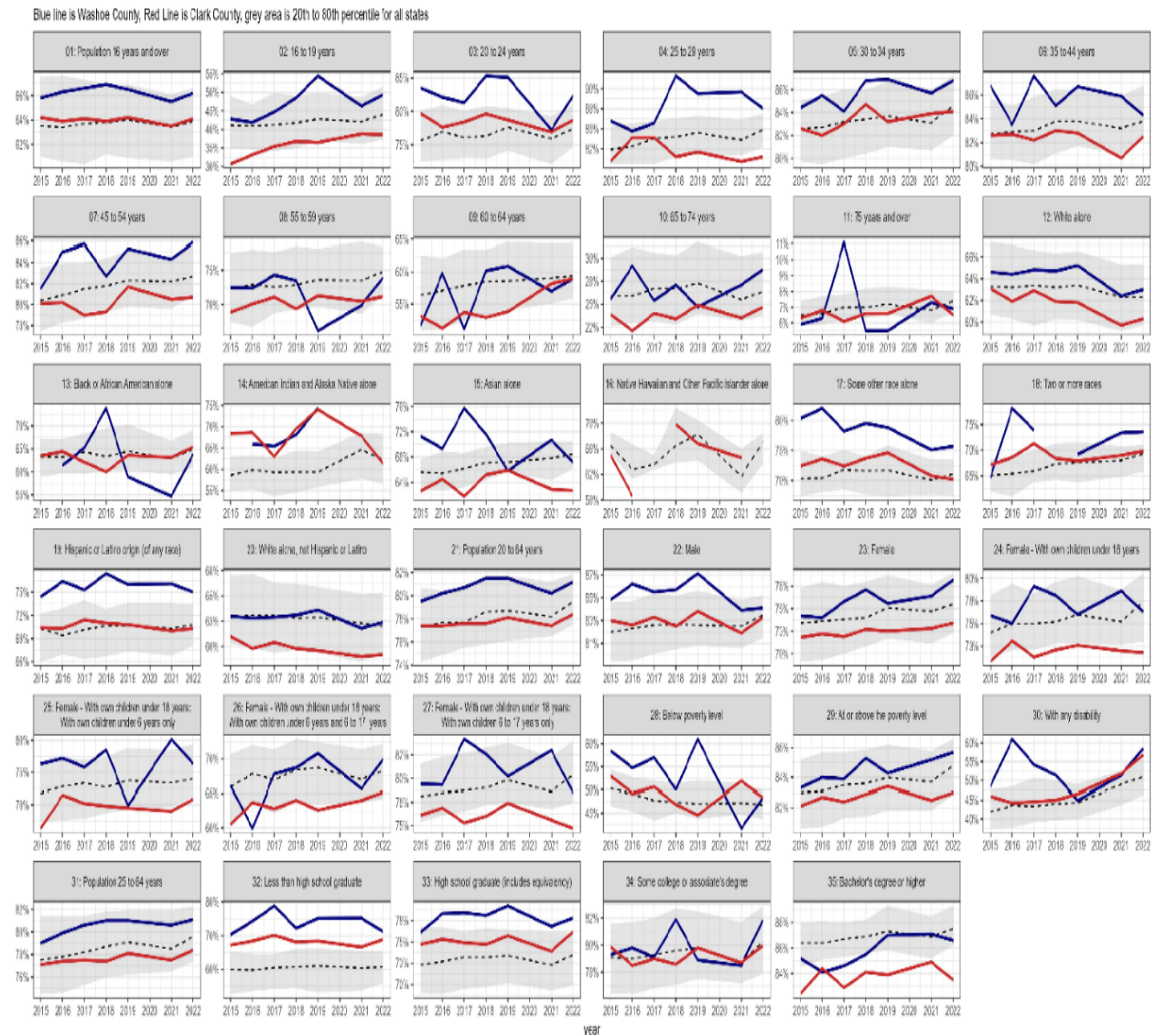
strengthen program alignment with emerging industries, and enhance institutional capacity, Nevada's public higher education system can transform apparent demographic advantages into durable competitive positioning while addressing the structural economic factors that undermine educational attainment incentives across the state's diverse geographic landscape.

# VIII. Appendix

Table 1. Descriptive Statistics

	N	Mean	SD	Median	Minimum	Maximum	Range
Population Growth Rate	187	0.004	0.025	0.003	-0.128	0.101	0.229
Birth Rate	187	0.194	0.031	0.197	0.095	0.250	0.155
Net Migration	187	1976.599	6611.396	53.000	-1350.000	37597.000	38947.000
High School Graduation Rates	144	83.764	10.563	84.375	0.000	100.000	100.000
Projected High School Graduates	128	2469.578	5948.317	228.000	14.000	24440.000	24426.000
Tuition Revenue (Thousands)	77	60652.000	72686.733	16836.000	3480.000	229406.000	225926.000
Retention Rate (Percent)	61	0.655	0.114	0.640	0.420	0.820	0.400
College Age Population (Percent)	74	3.174	2.427	2.005	0.330	6.960	6.630
Graduate Enrollment	33	2890.818	2175.595	3533.000	0.000	5367.000	5367.000
Online Enrollment	54	2364.278	2592.547	1174.000	56.000	13643.000	13587.000
Number of Online Degrees	22	2.727	2.251	2.000	0.000	6.000	6.000
Out-of-state Student Enrollment	53	2088.472	2354.088	620.000	90.000	6418.000	6328.000
International Student Enrollment	64	311.703	392.194	50.000	0.000	1237.000	1237.000
Graduation Rate (Percent)	77	31.953	15.526	28.500	7.100	62.700	55.600
Online Degree Graduation Rate	12	4.686	13.800	0.790	0.010	48.500	48.490
Undergraduate Enrollment	74	14067.824	10812.287	10790.500	2936.000	35943.000	33007.000
College Age Population	76	8913.855	7740.782	5960.000	977.000	21245.000	20268.000
Total Students	174	4817.121	10909.286	288.000	11.000	39180.000	39169.000
Total Graduates	174	3783.236	8537.849	224.500	10.000	31978.000	31968.000
Graduation Rate	174	83.843	7.833	84.050	59.700	95.000	35.300
Total number of Adult Diploma	62	113.355	139.213	31.500	10.000	507.000	497.000
Adult Diploma (Percent)	62	5.819	2.053	5.000	5.000	13.000	8.000
Total Number of Advanced Diploma	144	1048.139	2110.043	89.500	10.000	9266.000	9256.000
Advanced Diploma (Percent)	144	26.305	13.570	23.050	5.000	67.600	62.600
Total Number of Alternative Diploma	11	49.182	30.384	47.000	14.000	107.000	93.000
Alternative Diploma (Percent)	11	5.000	0.000	5.000	5.000	5.000	0.000
Total Number of College and Career Ready Diploma	64	1320.453	2580.645	77.000	10.000	8395.000	8385.000
College and Career Ready Diploma (Percent)	64	15.048	6.332	14.700	5.000	27.200	22.200
Total Number of Standard Diploma	164	2537.524	5578.311	187.000	11.000	20488.000	20477.000
Standard Diploma (Percent)	164	52.271	10.803	50.850	26.800	95.000	68.200
Total Number of Adjusted Diploma	54	227.778	400.905	33.500	11.000	1362.000	1351.000
Adjusted Diploma (Percent)	54	5.139	0.719	5.000	5.000	9.800	4.800
Total Number of Attendance's Certificates	4	974.750	638.738	1221.000	28.000	1429.000	1401.000
Attendance's Certificates (Percent)	4	5.000	0.000	5.000	5.000	5.000	0.000
Total Number of High School Enrollment	30	37.400	28.911	22.000	10.000	111.000	101.000
High School Enrollment (Percent)	30	5.000	0.000	5.000	5.000	5.000	0.000
Occupation (Percent)	75	43.161	46.851	9.280	0.380	100.000	99.620
Change (2018-2028)	15	18.697	5.509	16.200	12.930	32.500	19.570
Change (2020-2030)	15	19.855	5.033	19.100	11.700	31.300	19.600
Change (2022-2032)	17	14.953	4.415	14.300	6.900	22.400	15.500
Annual Growth Rate (2018-2028)	15	1.870	0.551	1.620	1.290	3.250	1.960
Annual Growth Rate (2020-2030)	15	2.975	3.774	2.090	1.170	16.500	15.330
Annual Growth Rate (2022-2032)	17	1.395	0.391	1.350	0.670	2.040	1.370

**Figure 1. Washoe County (Red Line) and Clark County (Blue Line) Labor Force Participation Rate by Demographic Group, 2015-2022**



**Figure 2: Rural Nevada by Degree Field, 2023**

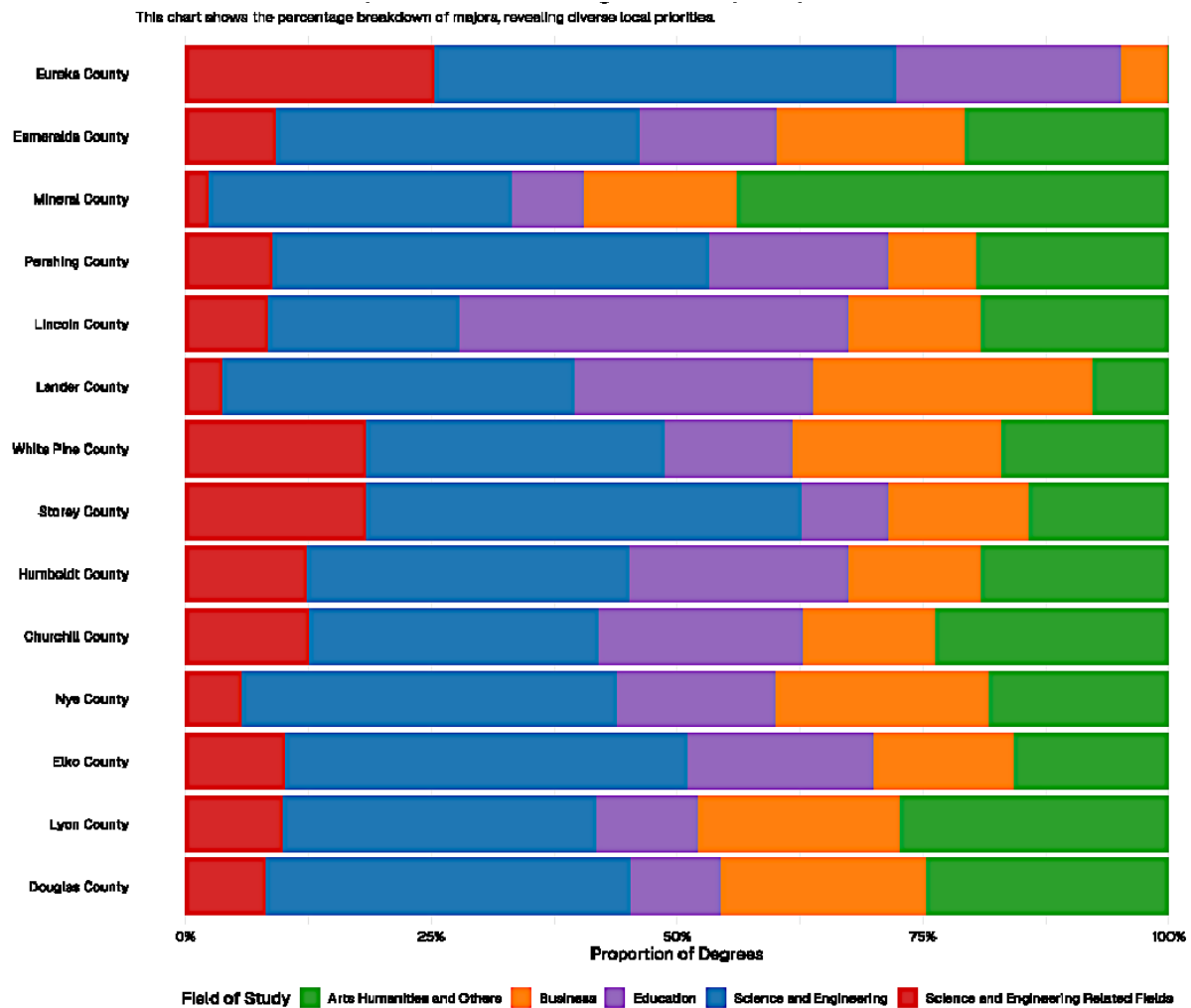


Figure 3: Rural Nevada Trends in Degree Fields, 2015-2023

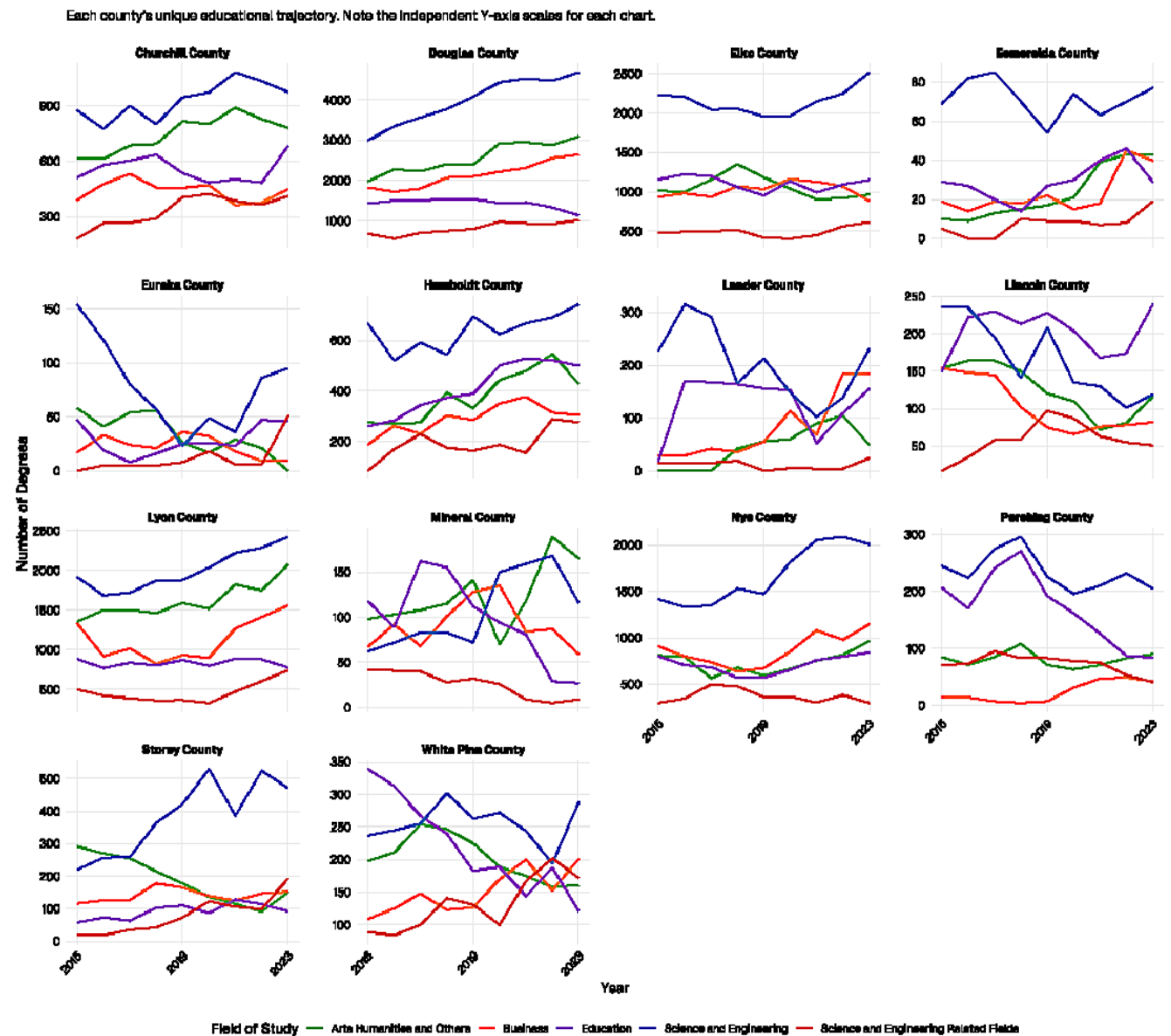
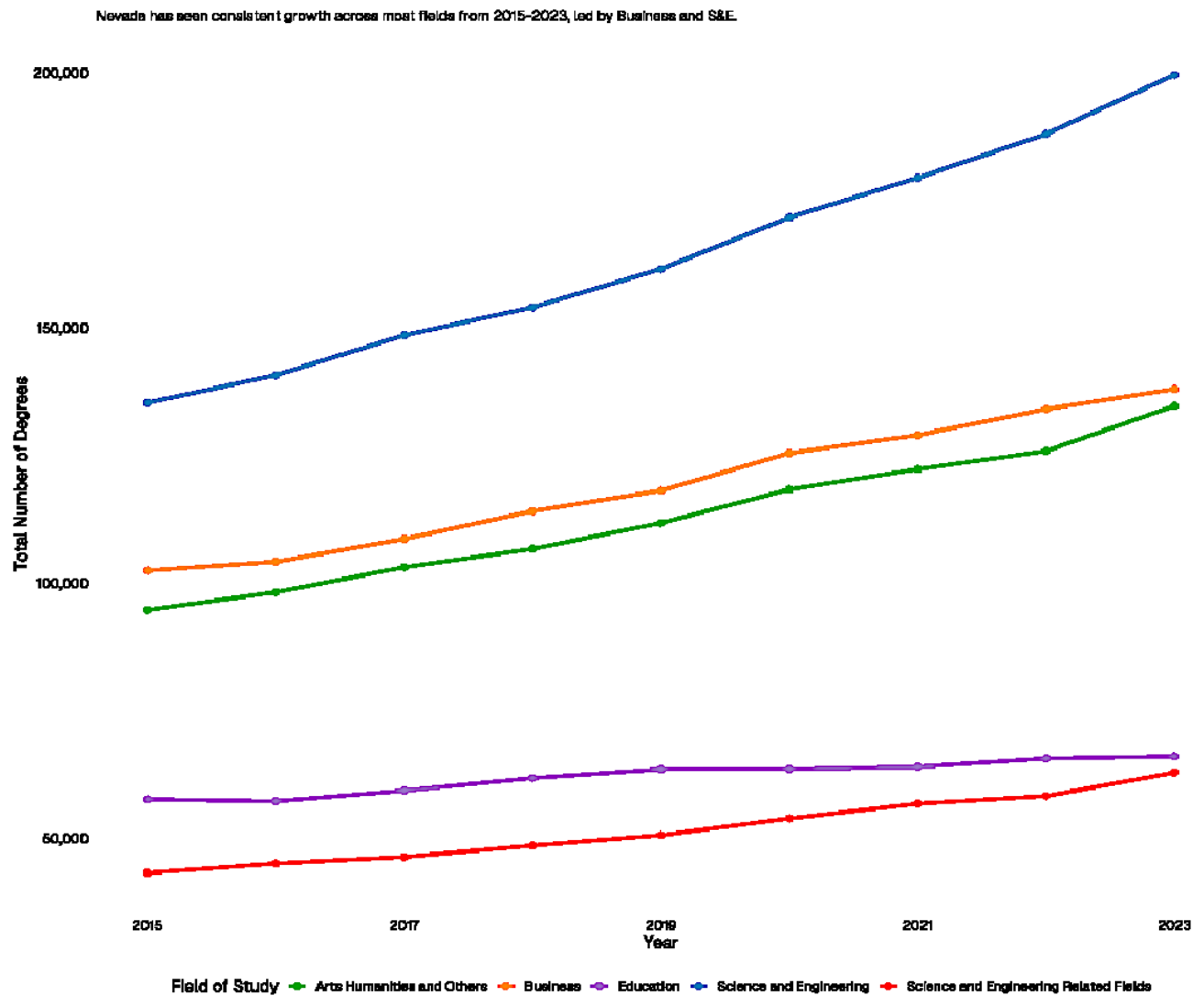
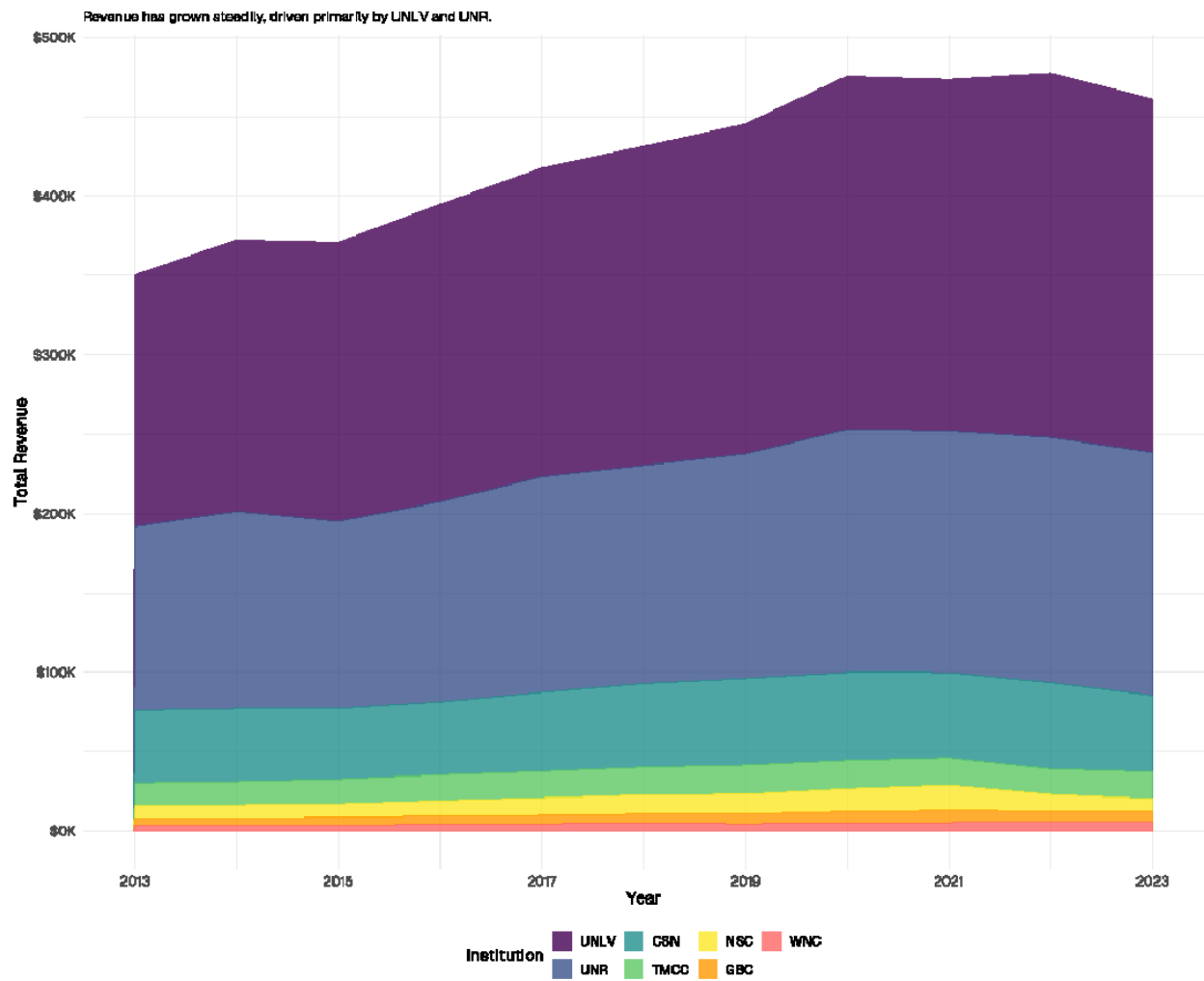


Figure 4: Statewide Growth in Bachelors Degrees by Field, 2015-2023



**Figure 5: NSHE Total Revenue Growth by Institution, 2013-2023**



**Figure 6: UNLV and UNR Account for More Than 81% of NSHE Revenue**

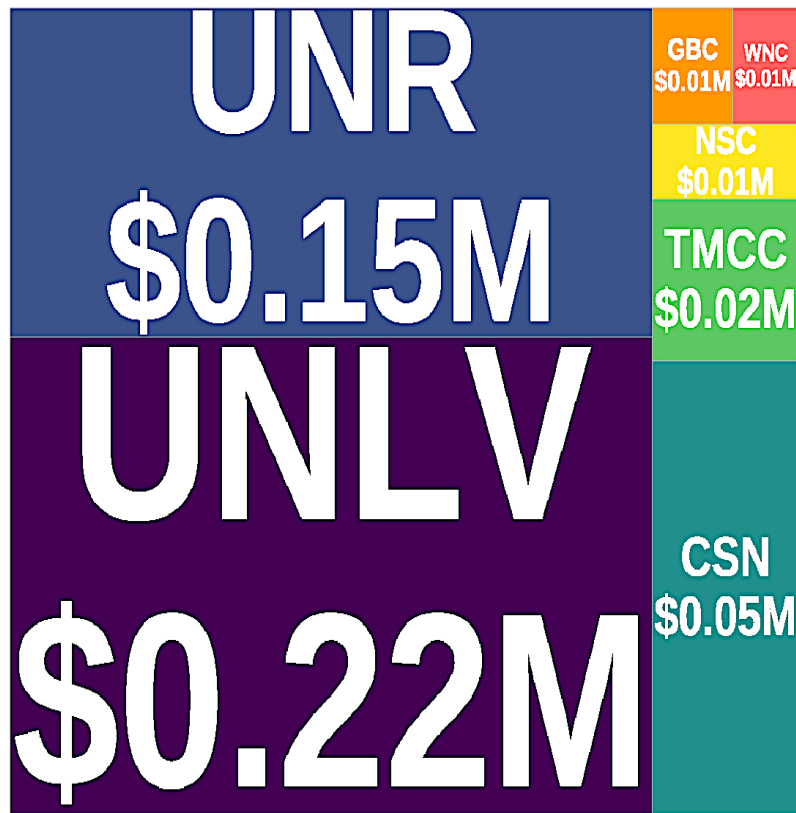
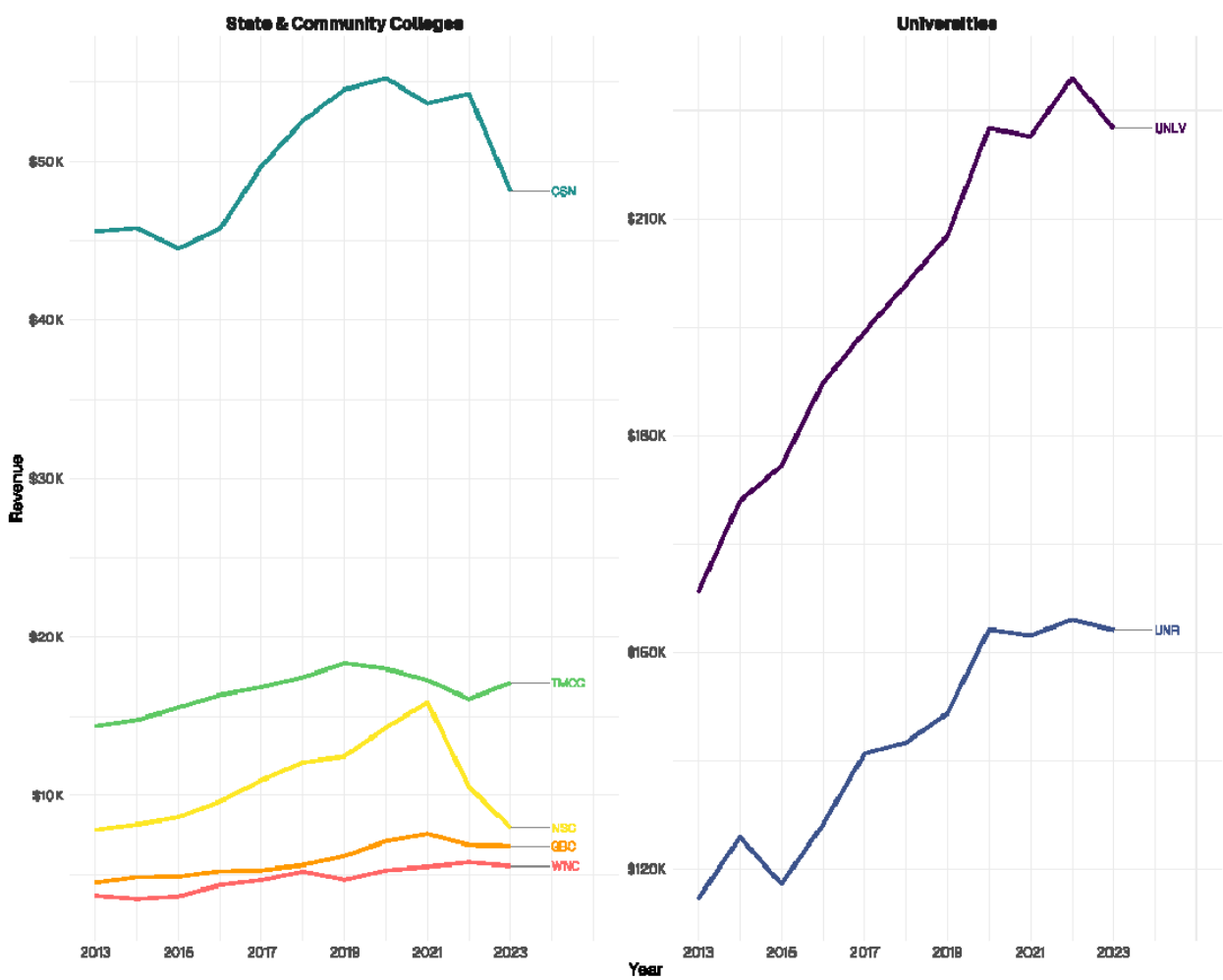
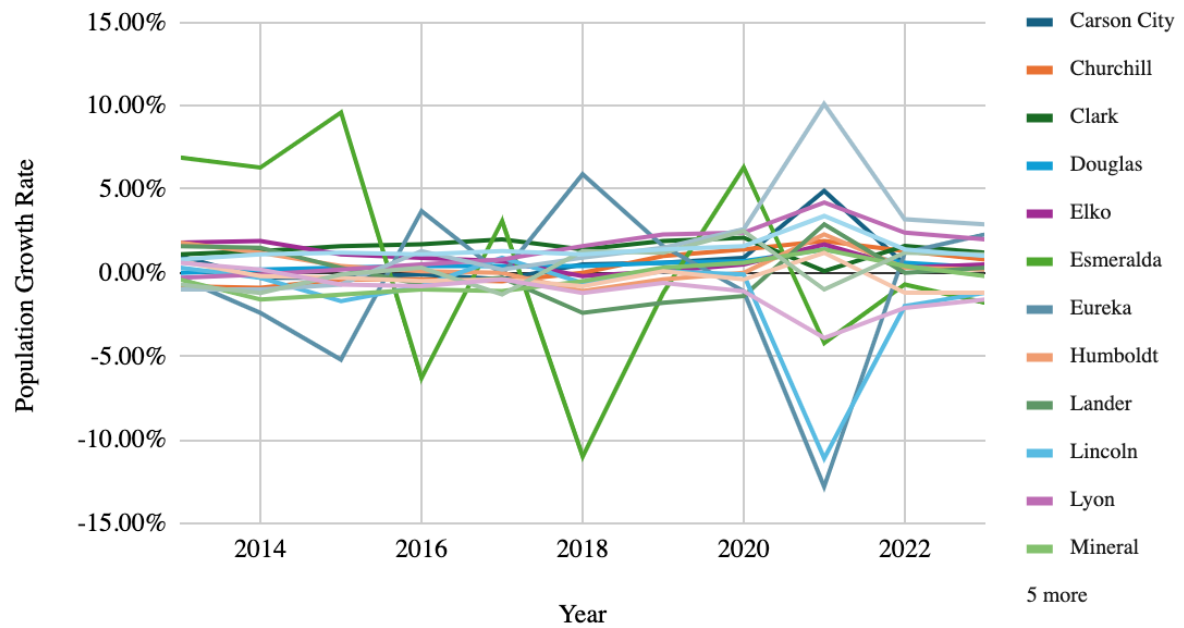




Figure 7: NSHE Revenue Trends by Institution Type, 2013-2023



**Figure 8: Nevada: County-Wide Population Trends, 2014-2022**



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