



# The Student Voice Report:

Insights on Enrollment Drivers, Stop-Out Factors,  
and Bridges to Lifelong Learning

Annual Report | 2025 Edition



# Table of Contents

---

# Executive Summary

For years, experts have predicted that the number of 18-year-olds entering college will begin a long period of decline due to lower birthrates after the 2008 recession. Now, that period — the “enrollment cliff” — is here. The new era of higher education is defined by learners with diverse preferences and expectations. Institutions can no longer survive on past traditions dominated by the high school student enrolling in college. By implementing innovative strategies, institutions can unlock new revenue streams and meet learners where they are — **including those who have stopped out (left college before completion) or opted out of higher education entirely.**

In February 2025, Ellucian partnered with EMI Research Solutions to conduct a survey of 1,501 U.S. learners to understand the motivation behind why prospective, current, and former students decide to pursue, continue, or forgo higher education. The research engaged four key demographics:

- **Current high school students** (including those participating in dual enrollment programs with an affiliated higher education institution)
- **College students and graduates**
- **Stop-outs** (former college students who left before completion)
- **Opt-outs** (individuals who never attended college)

With an expansive approach to learner types, the survey’s results provide critical insights into how institutions can adapt and grow. With reimagined recruitment strategies, colleges and universities can secure their enrollment pipelines, improve retention rates, and better meet the diverse needs of modern students.

In line with conclusions drawn from the [2024 Student Voice Report](#), financial barriers remain a top obstacle for those considering or continuing higher education. Ensuring that students engage in and properly navigate the financial aid process can strengthen the student body and encourage more learners to persist in their educational journey. The key is to deliver the information clearly and efficiently.

Overly complex academic pathways and opaque transfer processes also deter or derail student journeys, particularly for students who have stopped out. Many of these respondents indicated a lack of understanding around program progress and how they can build on their previously earned credits to reach completion.





Additionally, the survey revealed a disconnect between the traditional degree journey and continuing education, with many current and former students unaware of non-degree options that would directly benefit their career progress. This gap represents a significant opportunity for institutions to upskill and reskill learners of all backgrounds.

The 2025 Student Voice Report explores strategies to expand outreach to new learner segments, leverage AI to transform enrollment models, and enhance the value proposition of continuing education and workforce development. While the enrollment cliff is a significant concern across the higher education industry, institutions that innovate quickly can tap into a vast network of prospective students and power a lifetime of learning opportunities.



## Takeaways

An impressive **60% of stop-outs surveyed indicated that they would likely return** if their institution proactively provided clear program completion details.

For a significant portion of **opt-outs**, the primary reason they did not pursue higher education was the cost. **Over half (56%) of respondents within this demographic cited financial uncertainty as the top reason they did not attend.**

**The majority (52% of the opt-outs surveyed) were unaware of non-degree program options.** This lack of familiarity limits their understanding of the diverse pathways available for skill development and career advancement beyond the traditional four-year college experience.

# Key Findings

The survey results revealed several challenges and opportunities facing institutions in attracting and retaining contemporary learners.



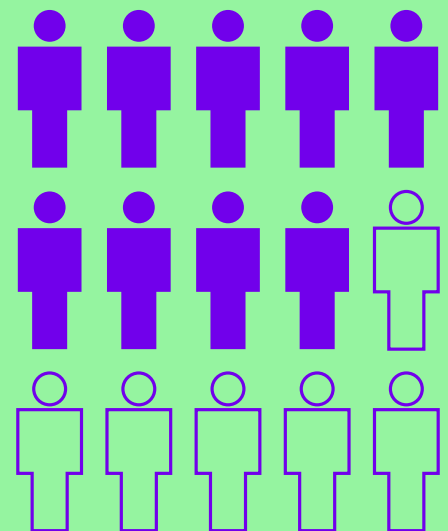
## Financial Uncertainty Blocks Access

In line with Ellucian's 2024 Student Voice Report, financial uncertainty continued to be the top barrier to enrollment — with significant implications across various student demographics. Over half of opt-outs (56%), for example, cited the prohibitive cost of college as their main reason for forgoing higher education.



## Clear Paths to Degree Completion

Many students perceive their academic journey as lacking direction toward completion. This ambiguity can lead to decreased motivation and increased attrition rates. Alternatively, a significant percentage of stop-outs indicated that they would likely return if the institution proactively provided clear program completion details (60%).



60%

of stop-outs indicated that they would likely return if the institution proactively provided clear program completion details



# Key Findings

(continued)



## The Credit Transfer Challenge

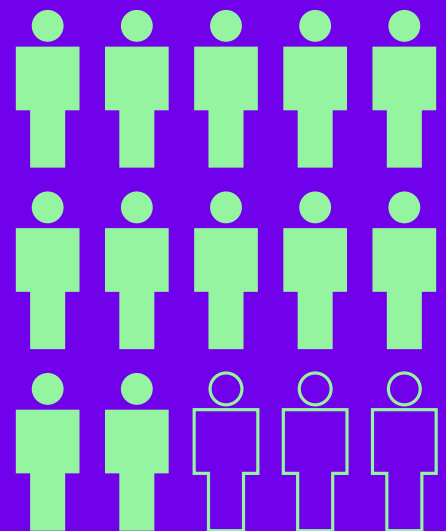
Current and former learners also identified the complexities of credit transfer as a major barrier to student mobility and completion. Only 22% of stop-outs reported a clear understanding of their remaining credit requirements, highlighting a substantial barrier to re-enrollment and degree completion.

Furthermore, among those interested in transferring credits — a critical step for many returning students — an overwhelming 82% expressed some level of uncertainty about how their previously earned credits would be recognized.



## Lack of Awareness of Non-Degree Programs

Despite the increasing importance of upskilling and reskilling in the current labor market, respondents' awareness of non-degree programs remains limited across demographics. One in four currently enrolled students (28%) had never heard of these alternative offerings. Nearly half (46%) had heard of non-degree programs but were unable to articulate what their purpose or value (totaling 74%).



# 82%

expressed some level of  
uncertainty about how their  
previously earned credits would  
be recognized

## THE MODERN LEARNER:

# Insights by Learner Type

Today's learners, whether they're still in high school, already in college, or have stepped away, share a common thread — they want an education that is flexible, relevant, and valuable. For many, college feels confusing, costly, or disconnected from the outcomes they care about most, like a stable job, career advancement, or personal growth.



## Learners also have unique challenges and priorities particular to their demographics.

Many **high school students** are unsure how to begin the college application process. As a result, more are exploring social media for guidance or entering the workforce directly, rather than seeking information from universities. **Dual enrollment students** often reliably bridge the gap from high school graduation to college, but they still seek clear, practical pathways that add value to their future.

Meanwhile, **current college students and graduates** feel the pull of lifelong learning, but their institutions don't always make non-degree options visible or easy to navigate. Without direct communication and relevant offerings, continuing education becomes a missed opportunity.

**Stop-outs and opt-outs** aren't disinterested; they're overwhelmed, under-supported, or unconvinced that college will deliver what they need. Most would come back if the path were clearer, the cost more transparent, and the programs more obviously connected to real opportunities.



Across the board, learners are asking for:

**relevance flexibility affordability clarity**

They're not rejecting education, but they must be won over with educational options perceived as valuable and worthwhile. By understanding the unique challenges of each group — as well as the barriers they have in common — institutions can remove obstacles and create direct paths to lifelong learning.

## HIGH SCHOOL STUDENTS:

# Activating Early Engagement

High school students are most commonly the target demographic for higher education recruitment. However, shrinking enrollment numbers show how “tried and true” approaches aren’t consistently effective with this segment. For colleges and universities, it’s critical to understand what drives and deters these students — and ensure outreach is on time and in touch with their needs.

---

### Early Engagement Drives Enrollment

Starting the college conversation early makes a measurable difference. According to [Hanover Research](#), 32% of high school students who are unsure about attending college say they don’t know how to begin the exploration process. By actively engaging students before ninth grade — with clear guidance on admissions steps, financial aid options, and career pathways — institutions can dispel early doubts and build confidence, increasing the likelihood that these students will ultimately enroll.

---

### Career-Focused Motivations Take the Lead

Today’s high school students are highly pragmatic in their college aspirations. 59% identified getting a good job or advancing their career as their top reason for planning to pursue higher education.

---

### Social Media’s Role in Shaping Choices

A quarter (25%) of high school respondents said they would rely most on social media (e.g., Instagram, TikTok, LinkedIn) when making decisions about educational opportunities, underscoring the importance of digital engagement strategies.





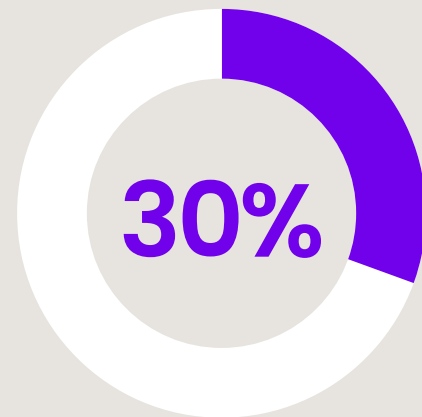
## HIGH SCHOOL STUDENTS: Activating Early Engagement (continued)

### Online Learning Expectations Are Higher

Nearly a third (30%) of high school students said they plan to complete their college education entirely online, more than any other learner group surveyed. This signals a strong demand for flexible, digital-first pathways.

### Competition from Direct-to-Employment Pathways

Corporations are increasingly stepping into the space traditionally occupied by colleges, engaging high school sophomores and juniors with employment opportunities that include clear advancement tracks right after high school ([Wall Street Journal](#)). These options are reshaping perceptions of what a successful post-secondary path can look like.



**of high school  
students said they  
plan to complete their  
college education  
entirely online**



### Strategic Opportunity

Institutions that invest in early, career-aligned, and digital-forward engagement strategies can better position themselves in a competitive landscape and build meaningful connections with a generation already exploring alternatives to the traditional college experience.

## DUAL ENROLLMENT STUDENTS:

# Cultivating Future Pipeline



# 59%

**of dual enrollment students recognize the value of upskilling**

Dual enrollment students — who are earning college credit alongside a high school diploma — offer a natural recruiting pool for institutions. For higher education leaders seeking to build a more resilient student body, these learners represent high yield enrollment and a strategic opportunity to kickstart early lifelong learning and boost engagement in both degree and non-degree programs.

### The Power of Dual Enrollment

The traditional pool of college-aged students is experiencing a decline — and birthrates aren't the only factor. Research indicates that 54% of high school grads have no plans to attend college ([Bill & Melinda Gates Foundation](#)). However, according to Ellucian's 2025 study, dual enrollment students represent a demographic with a higher propensity for pursuing higher education and engaging in lifelong learning. Notably, 59% of those surveyed recognize the value of upskilling, just over a third are familiar with non-degree programs, and 76% find non-degree programs valuable.

### A Growing Enrollment Pool

Data from the [National Center for Education Statistics](#) (NCES) also confirms growth and participation in dual enrollment programs, driven by factors such as state support, cost considerations, and college readiness initiatives.



### Strategic Opportunity

Strategically expanding dual enrollment initiatives enables institutions to cultivate future degree candidates early and establish a robust pipeline for non-degree learning opportunities.

## COLLEGE STUDENTS:

# Supporting Learners in Progress

Historically, continuing education units have operated independently from traditional structures at colleges and universities. However, this survey reveals a critical disconnect in how non-degree programs are perceived and integrated into the broader institutional offerings. Currently enrolled college students present an eager but often under-leveraged audience for flexible learning pathways that enhance career readiness and long-term engagement. For institutional leaders, dismantling silos between credit-bearing academic programs and non-credit continuing education is a strategic imperative for promoting lifelong learning across the student experience.

### A Ready Audience for Continuing Education

Currently enrolled college students represent a readily engaged audience with significant potential for further educational pursuits. A substantial majority of current students indicate their intention to pursue an additional degree or certificate (87%).

### Immediate Drive to Upskill

Nearly half of surveyed college students are planning to continue their education within the next year (44%), underscoring the need for timely and relevant offerings.

### The Non-Degree Awareness Gap

A considerable portion of current students demonstrate a lack of familiarity with non-degree programs. One in four (28%) had never heard of them before, and nearly half (46%) had heard of them but were unable to identify their purpose (totaling 74%).

### The Untapped Value Proposition

This lack of awareness, potentially stemming from traditional institutional silos, represents a missed opportunity. When the value of non-degree programs was clearly articulated, a staggering 67% of current students recognized their worth.



### Strategic Opportunity

Moving forward, it is imperative to intentionally integrate the narrative of degree and non-degree offerings, leveraging faculty and advisors as key communicators to deliver more value to currently enrolled students and set them on a path for continuing education after completion.



## COLLEGE GRADUATES:

# Unlocking the Next Phase of Learning

College graduates, while academically accomplished and often professionally motivated, remain an under-engaged segment when it comes to career-focused, non-degree options. This presents a clear opportunity for institutions to re-engage alumni and better communicate upskilling opportunities. By embedding continuing education into career services and alumni relations, higher education leaders can extend their impact well beyond graduation and strengthen the value proposition of their institutions amid an evolving workforce.



### Strategic Opportunity

As educated, motivated learners already familiar with academic environments, college graduates represent an ideal audience for short-term, skills-based programs, particularly those tied to career agility and advancement. Institutions that clearly communicate the value and career alignment of non-degree options stand to engage this group effectively, especially by integrating non-degree messaging into alumni communications and career services outreach.

### Awareness Gap Persists, Even Among Degree Holders

Despite their academic success, many college graduates are unfamiliar with non-degree options. Nearly one in four (22%) had never heard of non-degree programs, and an additional 44% were aware but lacked a clear understanding of them.

### Strong Value Recognition Once Introduced

After learning what non-degree programs entail, a striking 79% of college graduates saw them as valuable. To convert this interest into enrollment, institutions should expand their communications and engagement with graduates.

### Career Alignment Is Key to Interest

When considering non-degree options, college graduates prioritize programs that are affordable, align with their career goals, and offer fast, tangible pathways to advancement, especially through strong job placement support and targeted skill development.

## STOP-OUTS:

# Re-Engaging Lost Learners

Re-engaging students who have stopped out of college requires more than outreach — it requires an understanding of circumstances affecting retention. These students often did not leave because they doubted the value of higher education, but rather because unexpected life circumstances interrupted their studies. For institutions, this group represents a high-potential population of motivated and experienced learners who are eager to get back on track under the right conditions. By eliminating unnecessary friction and demonstrating a clear return on investment, colleges can bring these learners back into the fold and help them finish what they started.

### Understanding the Reasons for Departure

To effectively re-engage students who have stopped out, it is essential to understand the factors contributing to their departure. The reasons cited for leaving often point to challenges in balancing work, family responsibilities, financial strain, and overwhelming stress.

### The Belief in Higher Ed Remains

Importantly, the survey data strongly suggests that most stop-outs have not lost faith in the value of higher education. In fact, only 10% believed they could achieve their career goals without completing their program, and just 13% felt their program was no longer relevant. This highlights a significant opportunity for re-engagement based on their existing belief in the value of education.

### Information Gaps That Prevent Return

A significant challenge to re-engagement is the lack of understanding around program progress and credit transfer options. A limited percentage of stop-outs reported a clear understanding of their remaining credit requirements (only 22%), and an even smaller proportion felt confident that they understood the credit transfer process (15%).

ONLY  
**10%**

of stop-outs believed they could achieve their career goals without completing their program

## Top Reasons Stop-Outs Left Higher Education



**Balancing work, family, or other obligations**



**Overwhelming stress or anxiety**



**Insufficient financial aid**

## STOP-OUTS:

# Re-Engaging Lost Learners (continued)

### Clarity as a Catalyst for Return

However, a significant percentage indicated that they would likely return if the institution proactively provided clear program completion details (60%).

### Key Motivators for Coming Back

Five factors consistently emerged as motivators for re-enrollment:

- 1. Accessible Financial Aid:** Financial aid delivered clearly and on time is critical for making higher education affordable and preventing attrition.
- 2. Flexible Learning Options:** A substantial portion of stop-outs were on-campus students (39%) that took all their classes in-person. By offering more flexible learning options such as online or hybrid formats, institutions can help students fit education into their lives and persist.
- 3. Cost Transparency and Manageable Payment Plans:** Clear and upfront information regarding costs, coupled with manageable payment options, is highly valued by learners planning their next steps.
- 4. Clear Re-Enrollment and Credit Transfer Processes:** Only 15% of respondents feel confident they know how to transfer their credits, indicating a critical need for straightforward re-enrollment and credit transfer processes.
- 5. Career Placement and Internship Opportunities:** Opportunities for career placement and internships directly aligned with academic programs enhance the perceived value of re-enrollment. Despite this, according to the [2024 Working Nation Report](#), out of all U.S. community or technical colleges, only 541 institutions were identified as registered apprenticeship sponsors, with less than half (208) having an active apprentice. Systems like the [State University of New York \(SUNY\)](#) — which invests in hands-on learning and employer partnerships across its diverse campuses demonstrate how scalable, multi-institution approaches can create a powerful draw for stop-outs seeking a clear return on their educational investment. SUNY serves as an outstanding example of how success in student engagement and career readiness can be achieved and expanded system-wide.





## STOP-OUTS:

# Re-Engaging Lost Learners (continued)

### The Desired Outcomes: Career Advancement and Adaptability

Ultimately, stop-outs are motivated by the prospect of tangible career advancement through upskilling and the acquisition of skills enabling career transitions. Demonstrating the alignment of programs with labor market demands is crucial.



### Strategic Opportunity

Students that have stopped out show a desire for program completion but lack understanding on how to continue their journey. To get these students to return, institutions must address the factors that led to their stopping out in the first place — namely financial accessibility, flexibility, and clarity on how to achieve their learning goals. By doing so, and by demonstrating the career-building value of higher education, institutions can motivate these learners to get back on track.

## Top Reasons Stop-Outs Would Return

- 1 Personal fulfillment or achieving a lifelong goal
- 2 Skill attainment that could lead to a new career direction
- 3 Gaining skills that would lead to a promotion or pay increase

## OPT-OUTS:

# Understanding Non-Enrollment Mindsets

Those who have opted out of enrollment are still interested in learning, but factors such as practicality, cost, and clarity have prevented them from doing so through higher education. Many opt-outs view traditional college as financially out of reach, misaligned with their personal or professional goals, or simply unnecessary for the lives they envision. Yet when presented with clear, affordable, and work-relevant pathways, those perceptions shift, signaling a critical opportunity for institutions to meet opt-outs where they are. By redefining what college can look like, institutional leaders can make higher education a viable pathway for everyone.



### Cost as a Decisive Factor

For a significant portion of individuals choosing not to pursue higher education, the primary hurdle is financial. Over half (56%) cited the prohibitive cost of college as their main reason for not planning to attend. This substantial barrier underscores the need for accessible and affordable pathways to further learning and skill development.

### Personal Fulfillment Beyond the Classroom

Beyond financial constraints, a considerable segment questions the necessity of a college degree in relation to their personal aspirations. More than a quarter of opt-outs (28%) believe college is unnecessary for achieving their personal life goals, such as family or personal development. This perspective suggests a desire for fulfillment and growth through avenues they perceive as more direct or aligned with their individual priorities.

### Direct-to-Workforce Aspirations

Similarly, a notable proportion view the traditional college route as non-essential for their professional ambitions. 27% of opt-outs feel that a college degree is not essential for their desired career paths. This viewpoint likely stems from a belief in alternative routes to career success, such as direct entry into the workforce or the acquisition of specific skills outside of a traditional academic setting.

OPT-OUTS:

# Understanding Non-Enrollment Mindsets (continued)

## Unfamiliarity With Alternative Education

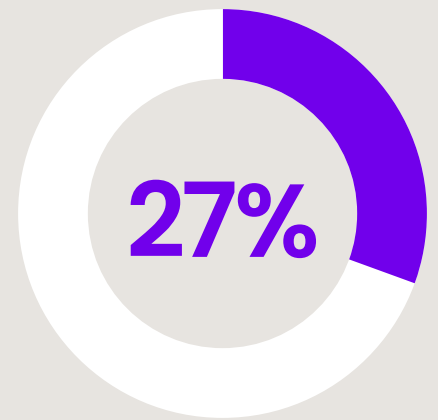
A significant majority (52% of opt-outs) were unaware of non-degree program options. This lack of familiarity limits their understanding of the diverse pathways available for skill development and career advancement beyond the traditional four-year college experience.

## The Shift in Perception Once Informed

Interestingly, once non-degree alternatives are explained, a shift in perception occurs. After understanding what these programs entail, a substantial 58% of opt-outs recognized their potential value. This highlights a clear opportunity for higher education institutions to educate and engage this population by showcasing the relevance and benefits of shorter-term, skills-focused programs.

## The Power of Practical, Work-Based Learning

For opt-outs, the top methods for skill-building outside of college include apprenticeships or on-the-job training (28%). This preference underscores the importance of hands-on learning and the desire to acquire skills directly within a professional context.



**of opt-outs feel that  
a college degree is  
not essential for their  
desired career paths**



## Strategic Opportunity

To make higher education more accessible and appealing to today's diverse student population, institutions must look beyond academic excellence and prioritize affordability, career relevance, and increased visibility of non-degree options.



# Implementing Actionable Strategies

The survey results by student type illustrate that strategic communication and engagement are essential to attract new, continuing, and returning students. By adapting to the varied needs of modern learners and clearly presenting alternative pathways to success, institutions can achieve financial sustainability while fulfilling their mission to deliver the value of higher education throughout students' lives.

**Here are targeted strategies to help reimagine how higher education drives success for all learners:**



## Prioritize Dual Enrollment

Expanding dual enrollment programs and proactively engaging these students as **early as ninth grade** can strengthen this reliable bridge from high school to college enrollment and set them on track for lifelong learning.



## Clarify Degree Plans

Degree plans help ensure students stay on track and have transparency into their degree progression. By streamlining degree planning with automations, institutions can help students persist, re-engage stop-outs, and improve completion rates.



## Ensure Cost Transparency

Implementing easy-to-understand financial aid offer letters, automated aid processes, and optimizing fund utilization are crucial for ensuring cost transparency and reducing the top barrier to student enrollment and persistence.



## Elevate Non-Degree Programs

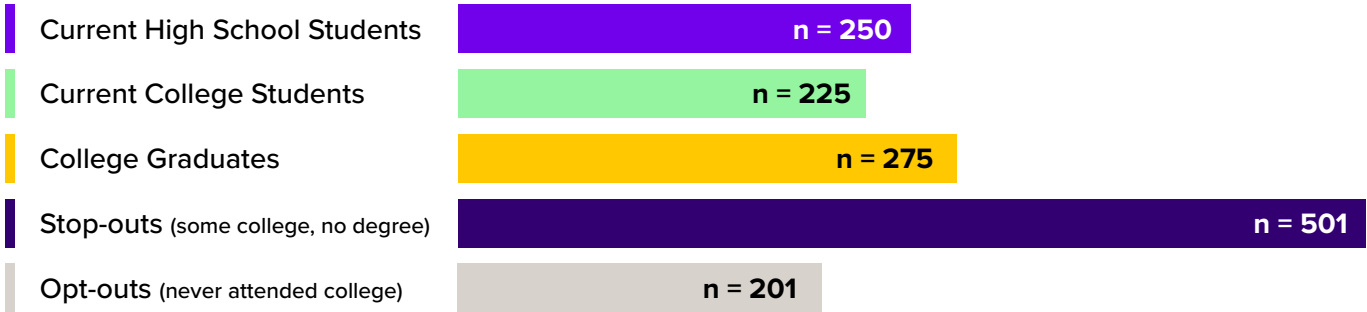
Elevating and aligning non-degree program offerings with market demands will provide valuable pathways for lifelong learning and career advancement across demographics. These programs also offer alternatives to traditional education programs that may be more appealing to opt-outs.

By embracing these strategies, institutions can break down barriers to access and completion, foster early and career-aligned engagement, and position themselves as lifelong partners in student success.

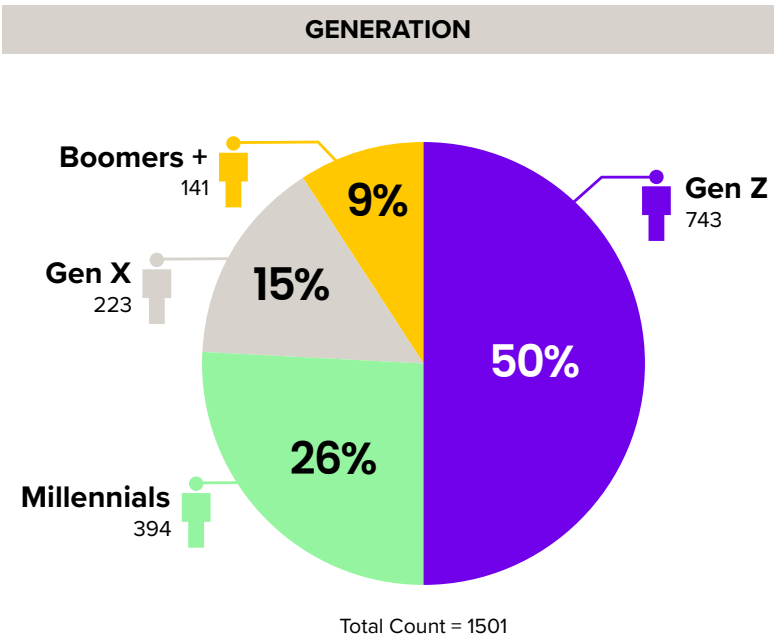
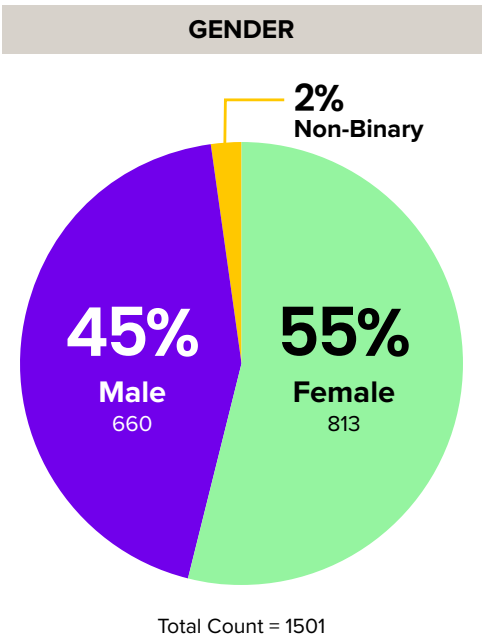
Now is the time to reimagine our institutional approach, building inclusive, adaptive pathways that empower every learner to achieve their goals. When we do this, higher education can truly open doors for everyone, helping students build better lives and stronger communities.

# Survey Methodology

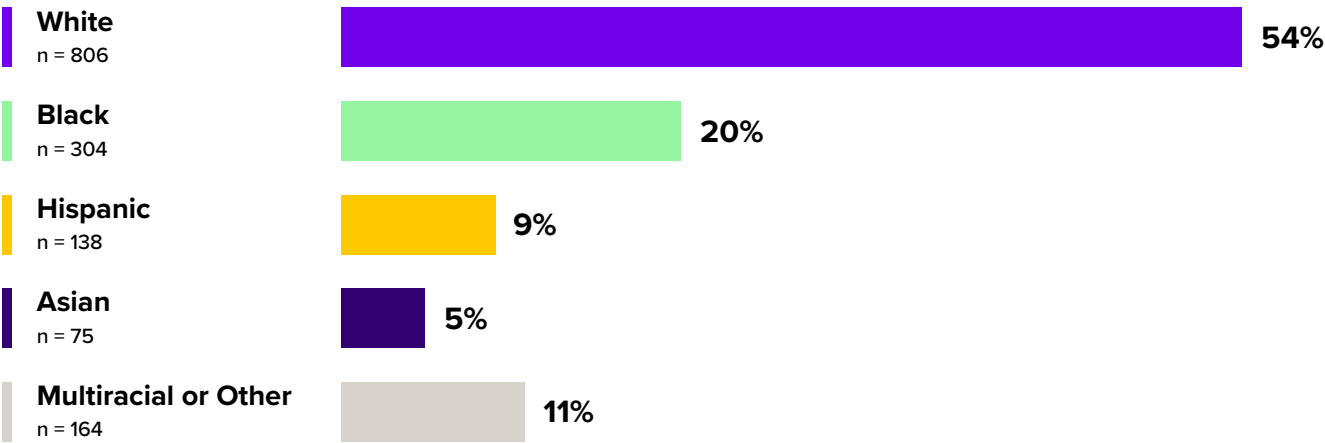
In partnership with EMI Research Solutions, Ellucian surveyed 1,501 learners across the U.S. between February 18–March 28, 2025. To capture meaningful data from learners in every part of their higher education journey, the survey sample was stratified across the following learner types:



Within each learner type, the sample was balanced to ensure representativeness across key demographics. The demographic breakdown of the full sample is displayed in the table and charts below.

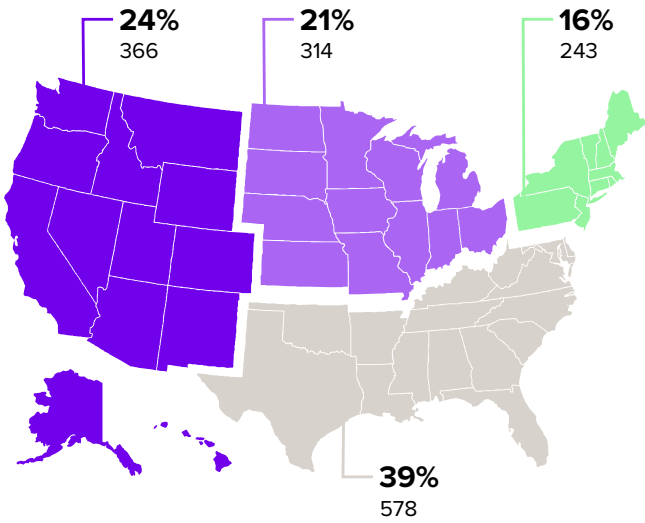


RACE



Total Count = 1487

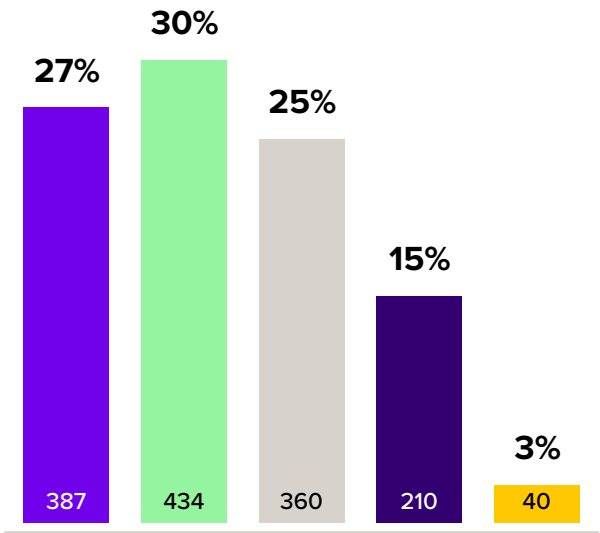
REGION



Total Count = 1501



HOUSEHOLD INCOME



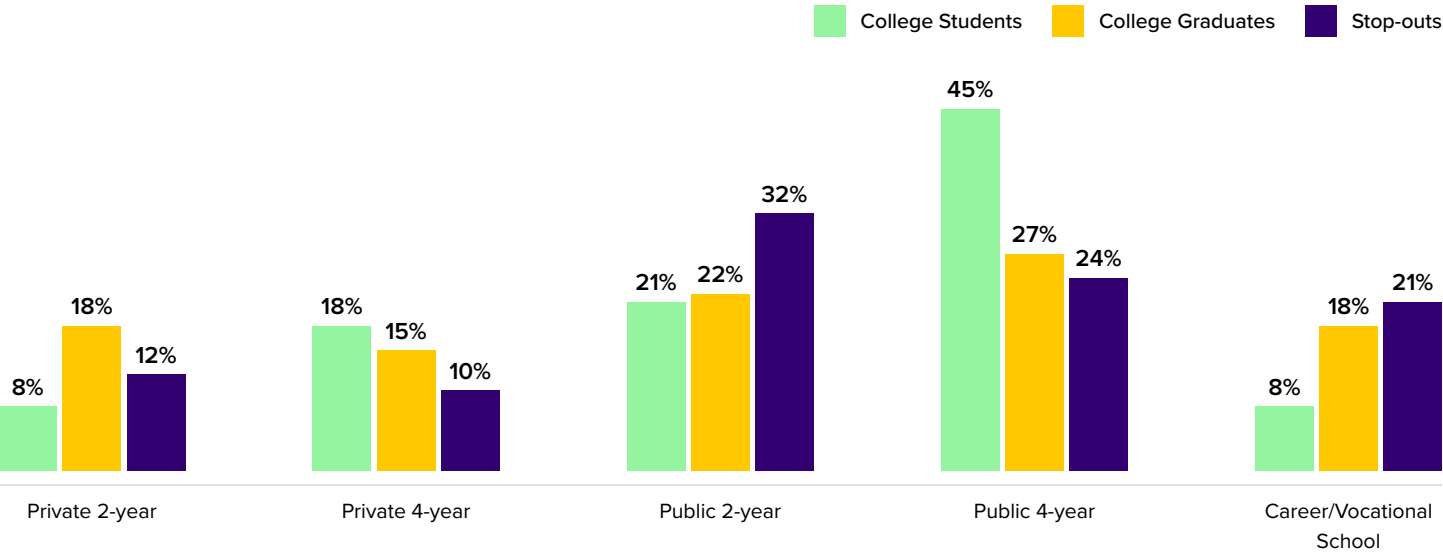
Total Count = 1431





## Undergraduate Institution Type

Survey Question: “Which type of institution [are you attending / did you attend] for your undergraduate studies?”



Total Count: College Students n = 225; College Graduates n = 275; Stop-outs n = 501

## Percentage of Respondents Rating Non-Degree Programs as Very or Somewhat Valuable

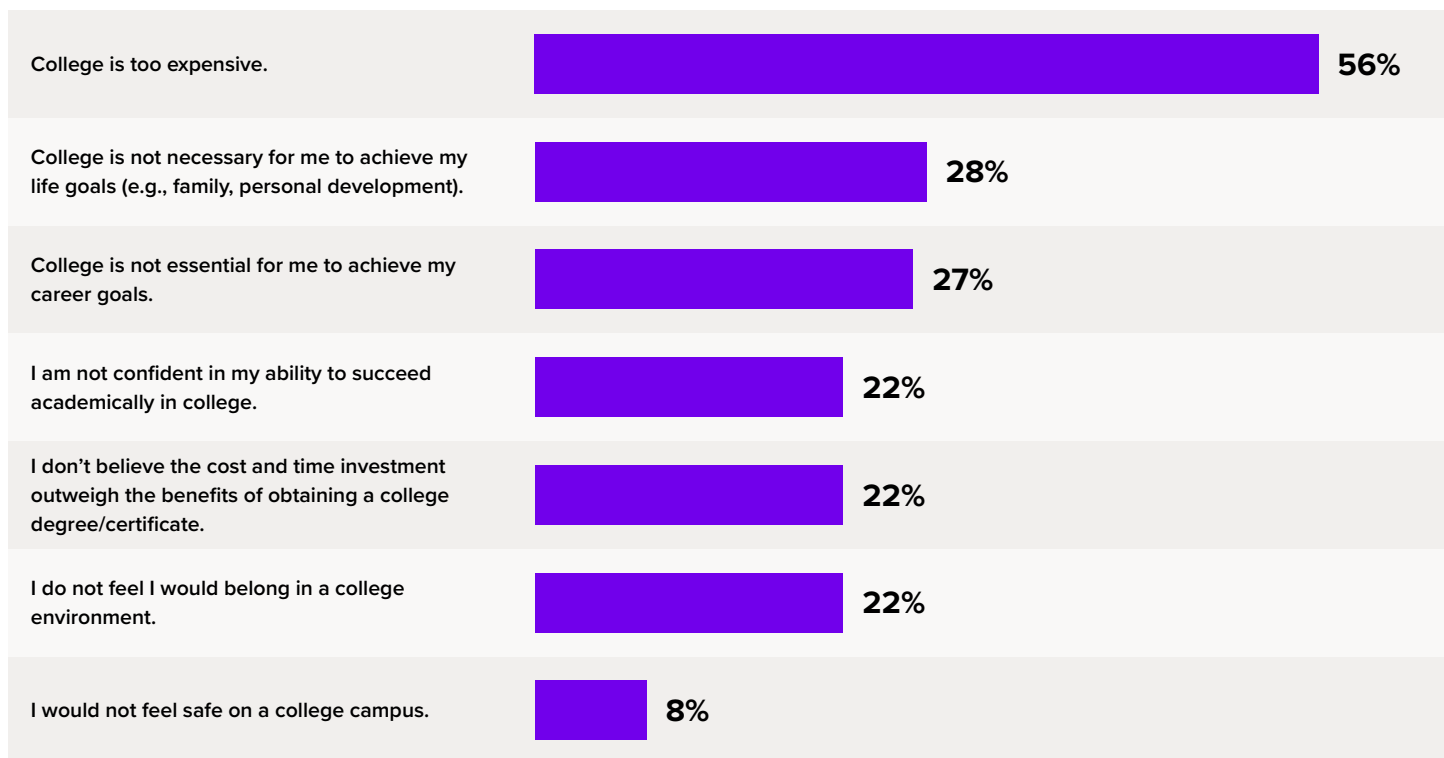
Survey Question: “How valuable do you think [non-degree] programs are?”



Total Count = 1501

## Reasons for Opting-Out of College

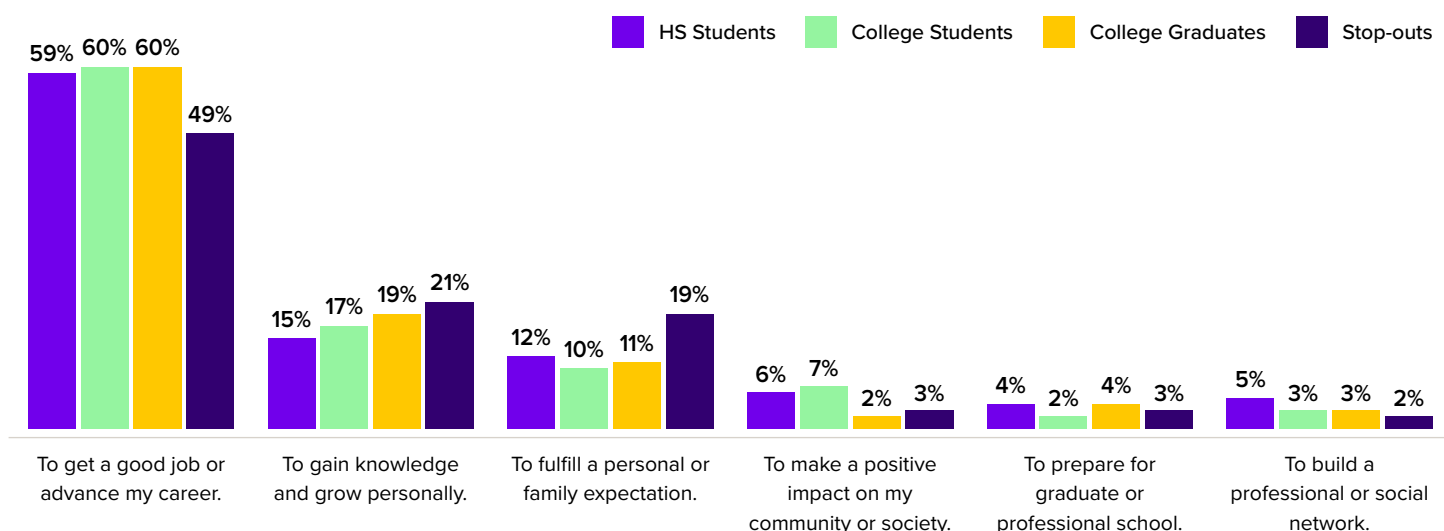
**Survey Question:** “Why do you not plan on attending college? (Select all that apply.)”



Total Count: Opt-outs n = 130

## Top Reason for Attending College

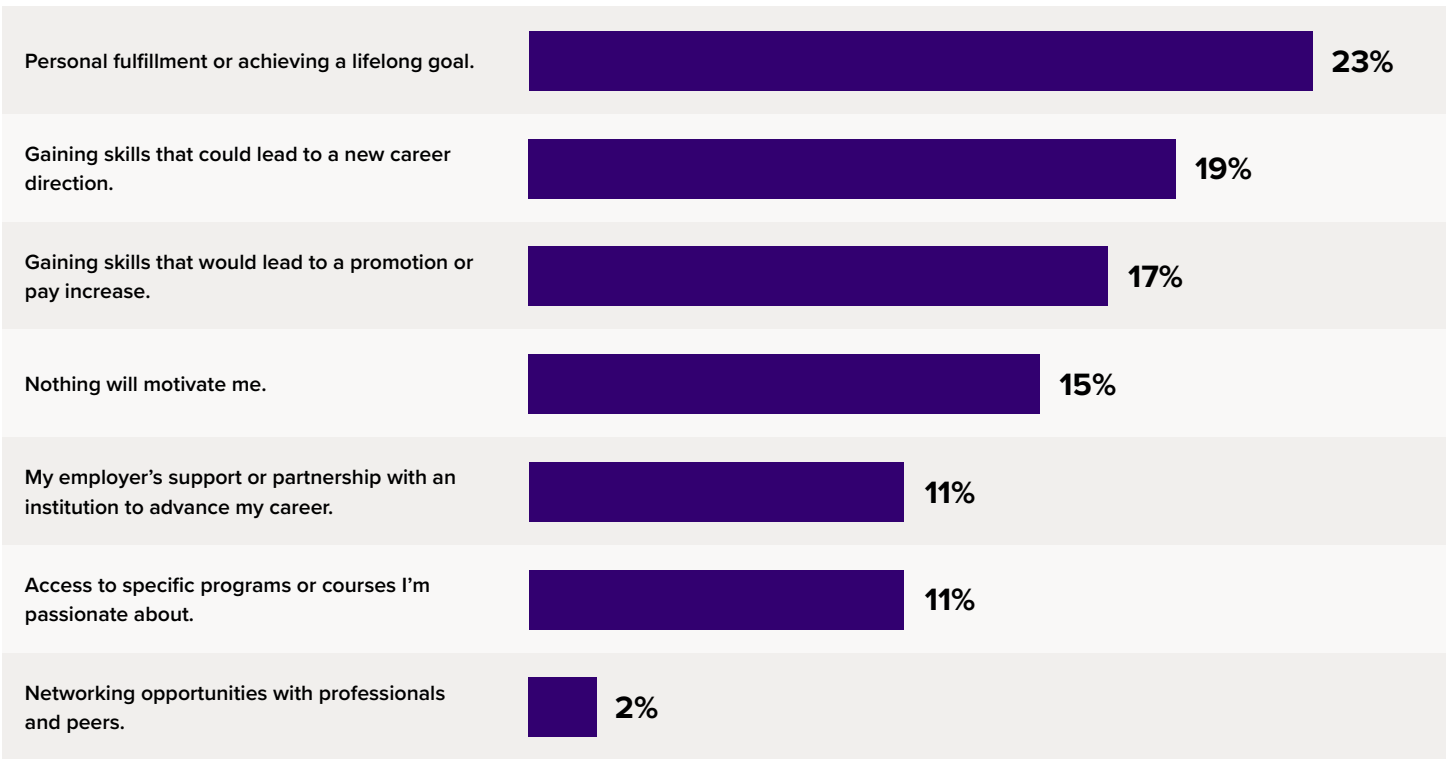
**Survey Question:** “Of the options you selected, which would you say is your top reason for attending college?”



Total Count: HS Students n = 235; College Students n = 225; College Graduates n = 275; Stop-outs n = 501

# Top Motivator to Return to College for Stop-outs

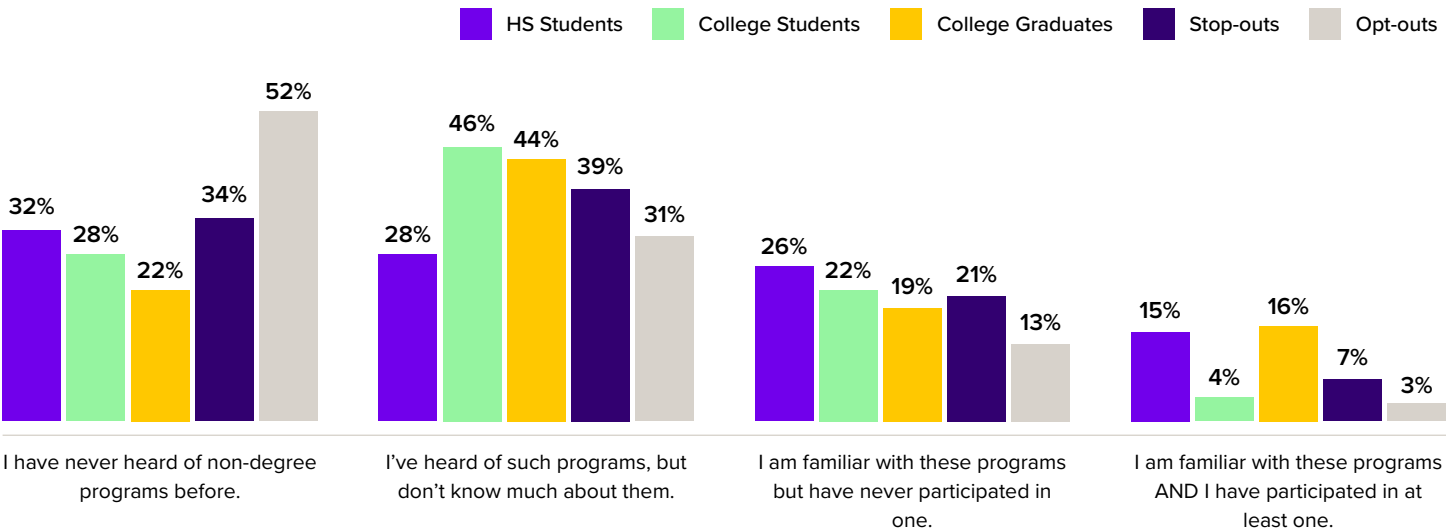
Survey Question: “Which [factor] would have the greatest impact on your decision [to go back and finish your degree] ”



Total Count: Stop-outs n = 501

# Familiarity with Non-Degree Programs

Survey Question: “How familiar are you with non-degree programs?”



Total Count: HS Students n = 250; College Students n = 225; College Graduates n = 275; Stop-outs n = 501; Opt-outs n = 250