



**LIVE WEBINAR**

**NAVIGATING U.S. HIGHER ED IN 2025:  
ENROLLMENT SHIFTS AND  
POLITICAL CHANGES**

**THURSDAY, MAY 8<sup>TH</sup>**  
11:00AM (EST) | 8:00AM (PST)



# MEET OUR PANEL

## HOST



**Maddie Messina**  
Account Manager



**Christopher Johnson**  
Senior Director and Head of Global  
Partnership Development




**Christopher Connor**  
Vice Provost for Enrollment  
Management



**Dr. Balaji Krishnan**  
Vice Provost, Office of International  
Affairs



## Questions:

 If you have a question for our panel, please submit it using the Q&A tab or in the chat!

## Housekeeping:



Your audio and video is OFF by default



We will email you a copy of the recording tomorrow



If you experience any technical issues, please email [marketing@keg.com](mailto:marketing@keg.com)

# The Student Journey with Keystone

## STUDENT MARKETING

## STUDENT RECRUITMENT

Search

Discovery

Inquiry

Engage &  
Qualify

Completed  
application

### Global Promotion on Educations.com

Promote your programs on our network of student websites  
in 29+ languages

### Social Media Campaigns

TikTok, Instagram &  
facebook

### Email Marketing

Newsletter & Direct Email  
Marketing campaigns

### Virtual Student Fairs

### Keystone Apply

We nurture and qualify your  
student leads to completed  
application!

Keystone supports you at every stage of the student journey, from search and discovery to student outreach, lead nurturing, application generation, enrollment management, and beyond.



# Understanding the Enrollment Cliff



Post-2025 expected drop of  
**15%–17%** in traditional  
college-age students

- U.S. high school grads peak in 2025 (~3.8M), steep decline begins in 2026
  - Root cause: Lower birth rates post-2008 recession
- Forecast: 13% drop in college enrollments by mid-2030s.
- Rural & small private colleges already seeing declines, despite modest recovery in 2023–24.



# Navigating the Cliff

## Evolving Admissions & Recruitment Strategies



Non-traditional learners:  
expanding online and  
adult education → **+15%  
increase in the last 2  
years**



The rise of alternative  
credentials



Shift in student  
values & behaviours



Offer short-term, career-  
aligned certifications



Double down on value  
messaging



Increasing **international**  
student recruitment in stable-  
growth regions



Increase collaboration and  
partnerships



High school “early  
commitment”  
programs



Corporate  
relationships →  
credit-for-experience  
programs





# Political Shifts Affecting Higher Ed

Federal focus on DEI, gender issues, and campus protests affecting policy

Restrictions on curriculum relating to race, gender, and U.S. history

Resulting risks impact international student recruitment.





# Impact of U.S. Policies on International Student Demand

April 2025 Pulse Data – 1,500+ Respondents Considering U.S. Study

»» **67%** of international students say education budget cuts and trade tariffs reduce their likelihood to study in the USA.

»» All student groups are notably impacted, even those generally positive about studying in the U.S. under Trump.

U.S. education cuts have a greater deterrent effect than:

- »»
- Australia's student caps 🇦🇺
  - Canada's enrollment limitations 🇨🇦
  - Cuts are seen as a more **immediate barrier** than political leadership or destination popularity





# What the Data Tells Us – Institutional Takeaways

April 2025 Pulse Data – 1,500+ Respondents Considering U.S. Study

## Primary concerns identified by students:

- Loss of scholarships/funding due to federal budget cuts
- Less support for international students at impacted institutions
- Tariffs reducing affordability, especially for students from China and Asia
- Confusion around what policies mean for their specific situation

## Data-backed institutional actions:

- Clarify availability of aid: Don't let students assume funding is gone if it's not
- Differentiate from federal policies: Highlight state and institutional-level support
- Address affordability directly:
  - Tuition guarantees
  - Work-study programs
  - Pathways to in-state tuition
- Message proactively: Reassure prospective students that their goals are still achievable in the U.S.







# **Silver Linings: Adapting to Changing Times in Higher Ed**

*"Crisis breeds innovation."*



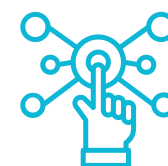
Rise of new learners



Prioritizing retention + student support



Collaboration expanding



Digital transformation accelerated



Advocacy for policy change

*Want to continue the conversation?*

**27-30  
MAY**

**NAFSA**

**2025**

**SAN DIEGO**

**Booth P1217**

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for NAFSA 2025!**



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