

PERCEPTIONS OF HIGHER EDUCATION IN MONTANA



2024

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REPRESENTATIVE SAMPLE OF MONTANANS

| Region | 2021 | | 2023 | |
|---------------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| Eastern | 7% | 169 | 7% | 172 |
| North Central | 13% | 205 | 14% | 176 |
| Northwest | 32% | 245 | 32% | 215 |
| South Central | 19% | 211 | 20% | 213 |
| Southwest | 29% | 263 | 27% | 252 |

| Gender | 2021 | | 2023 | |
|---------------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| Male | 50% | 437 | 48% | 382 |
| Female | 50% | 640 | 51% | 629 |
| Self-describe | 0% | 2 | 1% | 4 |

| Household Income | 2021 | | 2023 | |
|------------------------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| \$0 to \$29,999 | 15% | 109 | 15% | 113 |
| \$30,000 to \$49,999 | 17% | 162 | 19% | 154 |
| \$50,000 to \$74,999 | 19% | 221 | 17% | 181 |
| \$75,000 to \$99,999 | 20% | 190 | 18% | 177 |
| \$100,000 to \$149,999 | 19% | 209 | 18% | 197 |
| \$150,000 or more | 11% | 149 | 12% | 137 |

| Household Size | 2021 | | 2023 | |
|----------------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| 1 | 25% | 260 | 26% | 255 |
| 2 | 42% | 528 | 41% | 478 |
| 3 | 13% | 122 | 13% | 115 |
| 4 or more | 19% | 173 | 20% | 166 |

| Community Size | 2021 | | 2023 | |
|------------------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| Less than 1,0000 | 13% | 149 | 13% | 148 |
| 1,000 to 9,999 | 28% | 322 | 25% | 292 |
| 10,000 to 49,999 | 23% | 192 | 20% | 160 |
| 50,000 or more | 36% | 409 | 43% | 400 |

| Educ. Attainment | 2021 | | 2023 | |
|---------------------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| No HS diploma | 4% | 25 | 3% | 17 |
| High school diploma | 14% | 99 | 17% | 104 |
| Some college | 33% | 192 | 31% | 182 |
| Associate Degree | 20% | 122 | 16% | 97 |
| Bachelor's degree | 13% | 287 | 15% | 299 |
| Some grad school | 3% | 70 | 3% | 68 |
| Graduate degree | 13% | 295 | 14% | 252 |

| Age | 2021 | | 2023 | |
|-------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| 18-34 | 26% | 128 | 22% | 140 |
| 35-44 | 18% | 134 | 18% | 149 |
| 45-54 | 13% | 152 | 14% | 116 |
| 55-64 | 21% | 215 | 20% | 179 |
| 65+ | 23% | 442 | 26% | 420 |

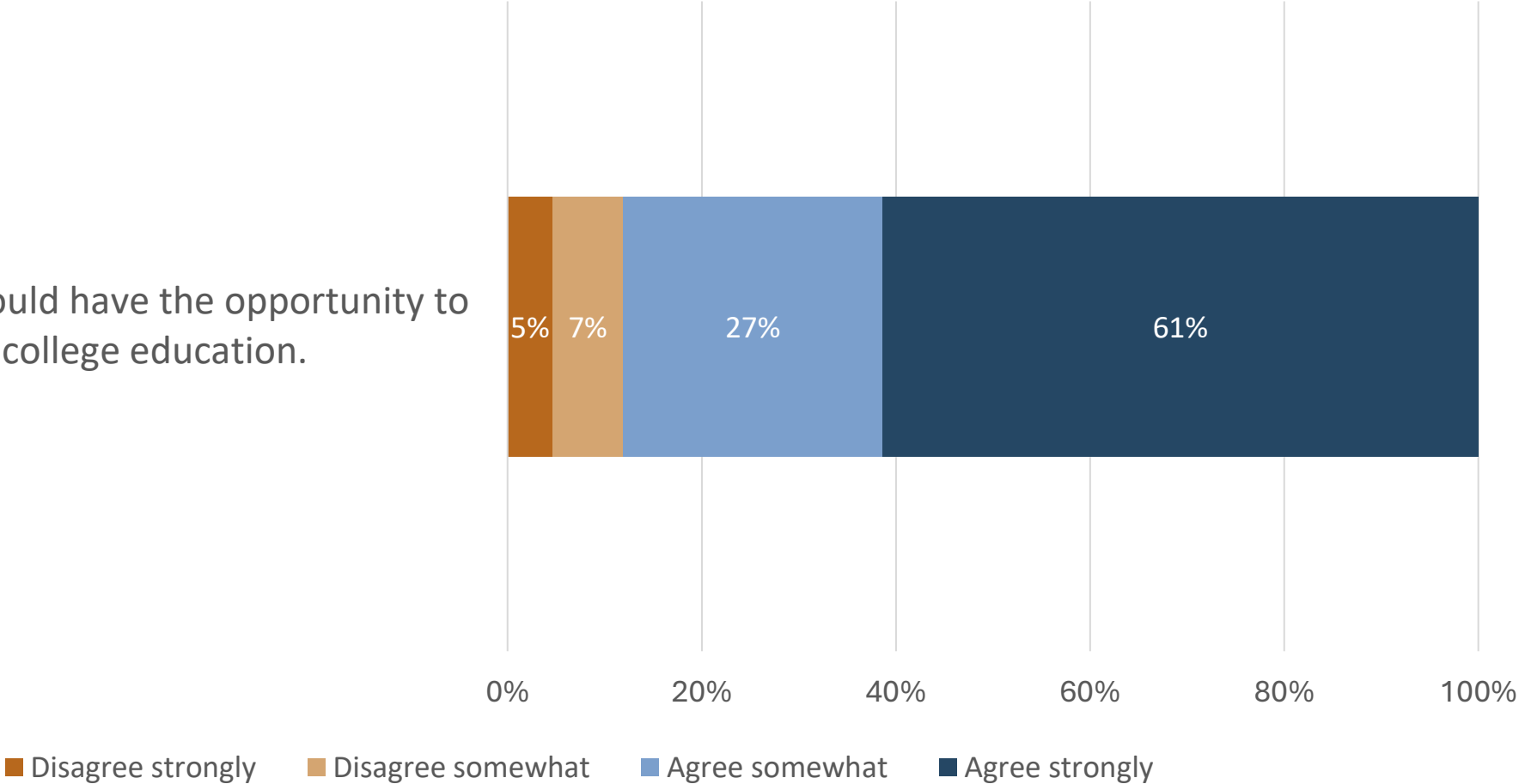
| Race/Ethnicity | 2021 | | 2023 | |
|------------------|------------------|-----------------|------------------|-----------------|
| | Weighted Percent | Total Responses | Weighted Percent | Total Responses |
| White/Caucasian | 89% | 991 | 90% | 937 |
| Black/AA | 1% | 4 | 1% | 6 |
| AIAN | 7% | 52 | 4% | 50 |
| Hispanic/Latino | 4% | 24 | 1% | 10 |
| Asian | 1% | 14 | 0% | 6 |
| Pacific Islander | 1% | 5 | 0% | 2 |
| Other | 2% | 19 | 2% | 26 |

In 2021, 1,095 completed surveys were weighted to represent Montana by region, gender, age, and educational attainment. Adjusted margin of error at the 95% confidence level for the 2021 sample is ± 4.8%. In 2023, 1,028 completed surveys were weighted by the same demographic variables. Adjusted margin of error at the 95% confidence level for the 2023 sample is ± 4.5%. Weighted percentages exclude non-response.

Montanans have a shared commitment to college access.

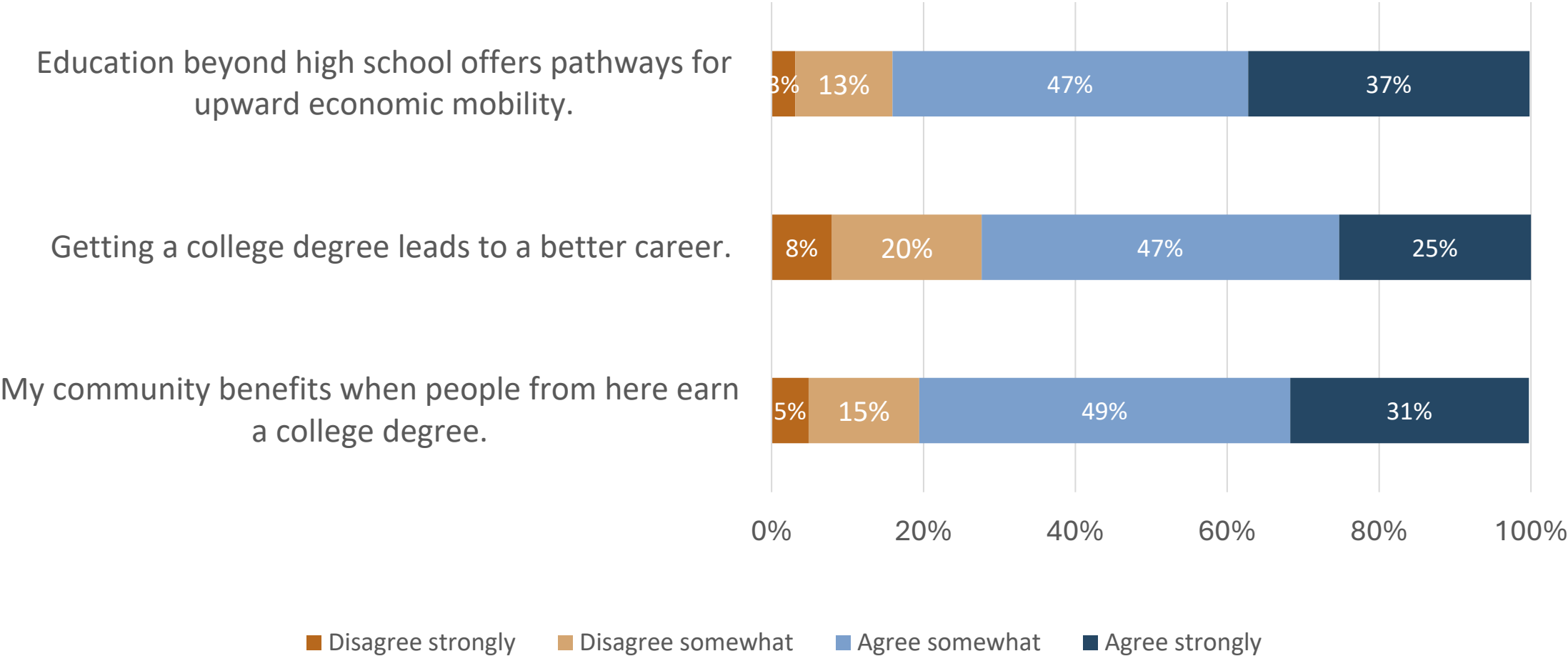
Resident Agreement That...

All Montanans should have the opportunity to access a college education.



Montanans perceive college as good for individuals and society.

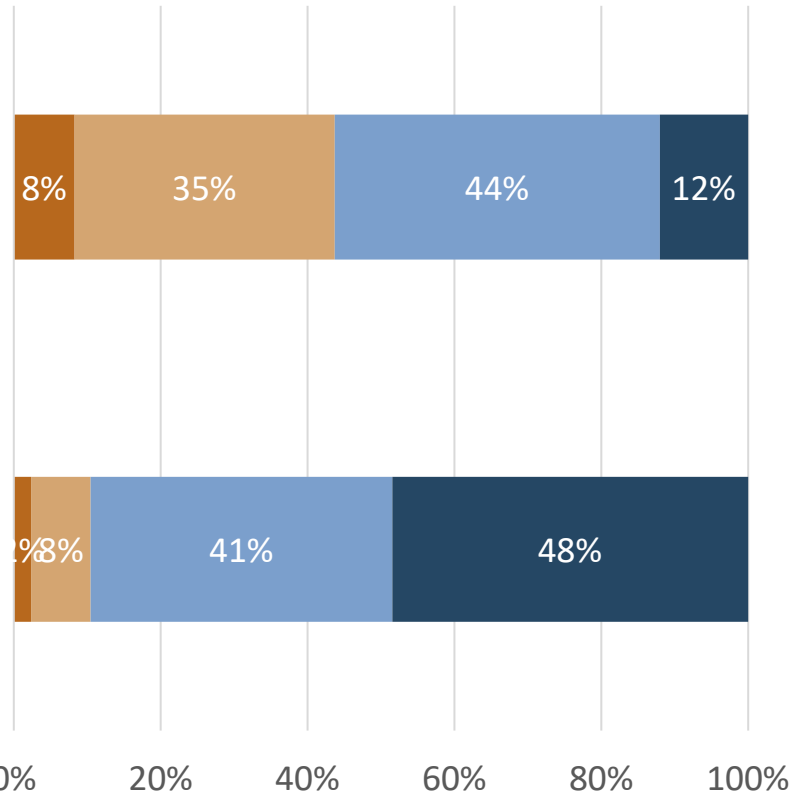
Resident Agreement That...



However, barriers to value persist.

Resident Agreement That...

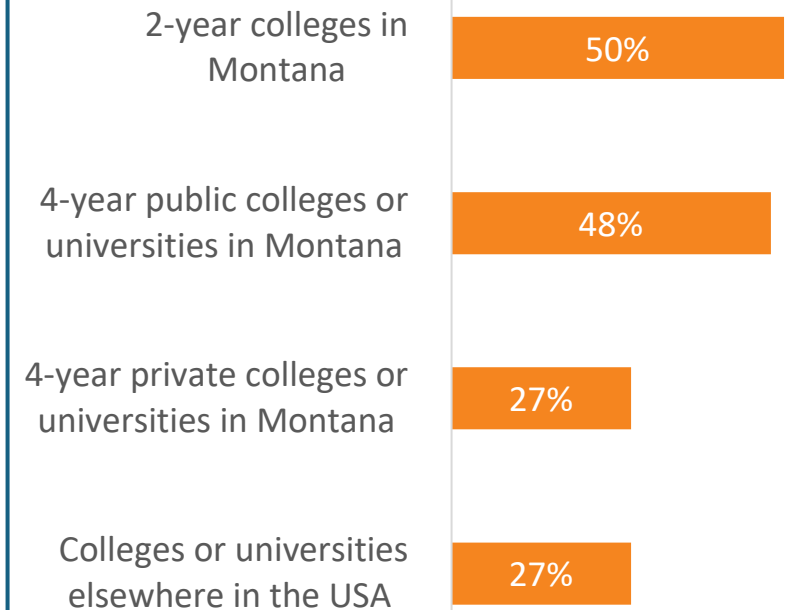
People living in rural Montana have access to quality higher education options.



The cost to attend college is too high for most people in my community.

■ Disagree strongly ■ Disagree somewhat ■ Agree somewhat ■ Agree strongly

Resident Agreement That Institution Types Are "Worth the Cost of Attending"

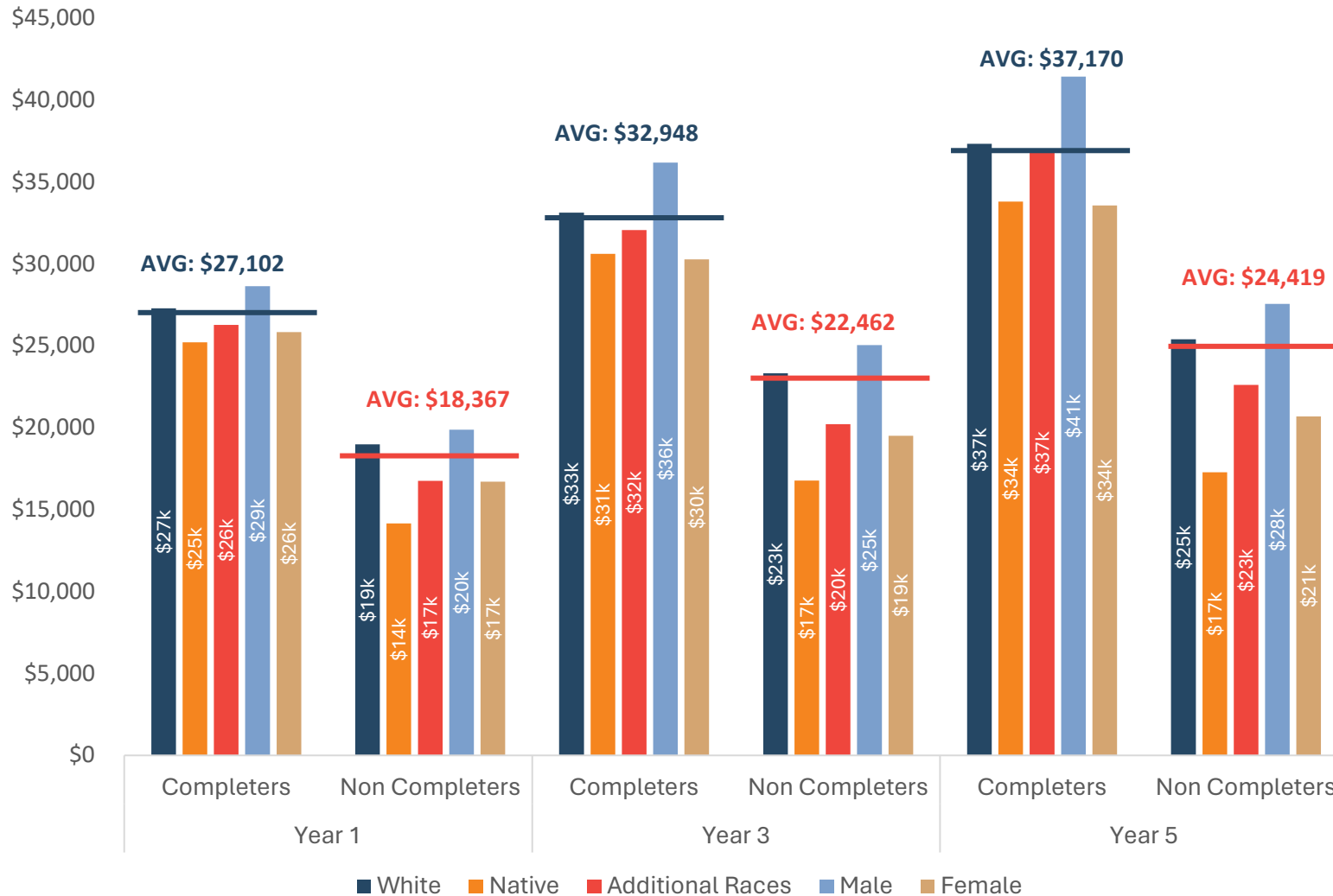


College affordability in Montana by institution type.

| | | Public Two-Year | | Public Four-Year Nondoctoral | | Public Research | |
|--------------------------------------------------|----------------------------------------|-------------------|-------------------------|------------------------------|-------------------------|-------------------|-------------------------|
| | | 24% of enrollment | | 16% of enrollment | | 60% of enrollment | |
| | | Net Price* | % of avg. family income | Net Price* | % of avg. family income | Net Price* | % of avg. family income |
| \$56k MT Median Family Income | \$0-30k (18% of households) | 8,448 | 49 | 11,000 | 63 | 13,576 | 78 |
| | \$30k-48k (16%) | 8,874 | 23 | 12,161 | 31 | 14,100 | 36 |
| | \$48k-75k (21%) | 11,674 | 19 | 14,180 | 23 | 17,321 | 28 |
| | \$75k-110k (19%) | 12,696 | 14 | 16,869 | 18 | 19,549 | 21 |
| | \$110k + (25%) | 13,838 | 7 | 17,138 | 9 | 20,866 | 11 |

Data Source: IPEDS AY 2020-2021 survey. American Community Survey 2016-2020 5-year estimates (accessed via IPUMS). MUS headcount enrollment F2022. *Net price includes tuition, room/board, and fees less all grant and scholarship financial aid (institutional, state, and federal)

College completion matters for return on investment.



Increased wage outcomes for college graduates suggest that earning a degree has a positive ROI for individuals.

Yet, that positive return on investment is dramatically curtailed for those who do not complete degrees.

Furthermore, respondents who don't have college experience are significantly more likely to **disagree that a college degree leads to better career** (37%) compared to those with an AA or BA (31% and 18%).

Data source: Wage outcomes 1-, 3- and 5-years after departure from MUS enrollment for completers and non-completers. Wage data sourced from MT DLI unemployment insurance programs. Figures report outcomes for Montana residents who are employed in-state for at least one quarter during the reported year. All wages expressed in constant 2019 dollars. Year 1 reports students departing 2010-2016. Year 3 students departing 2010-2014. Year 5 students departing 2010-2012.

Montanans considering college in the next 5 years are more concerned about affordability and accessibility.

69%

Disagree “people living in rural Montana have access to quality higher education” - a greater proportion when compared to other college-going household types (41%-44%).

8 in 10

Agree “there isn’t a lot of help to pay for college.”

1 in 5

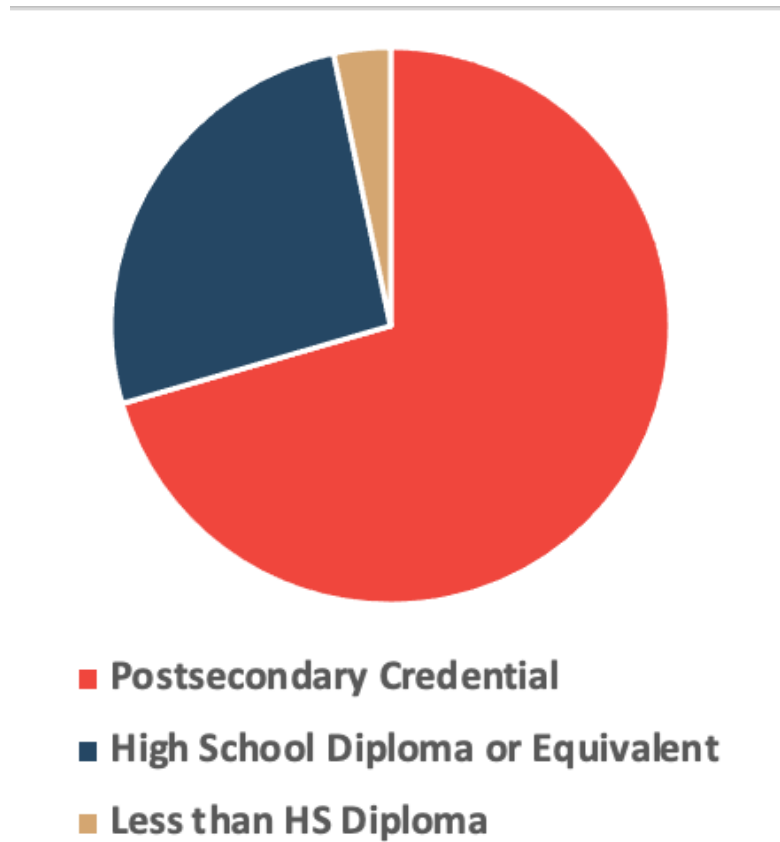
Would categorize those they know who have gone to college having negative experiences and finishing their degrees.

51%

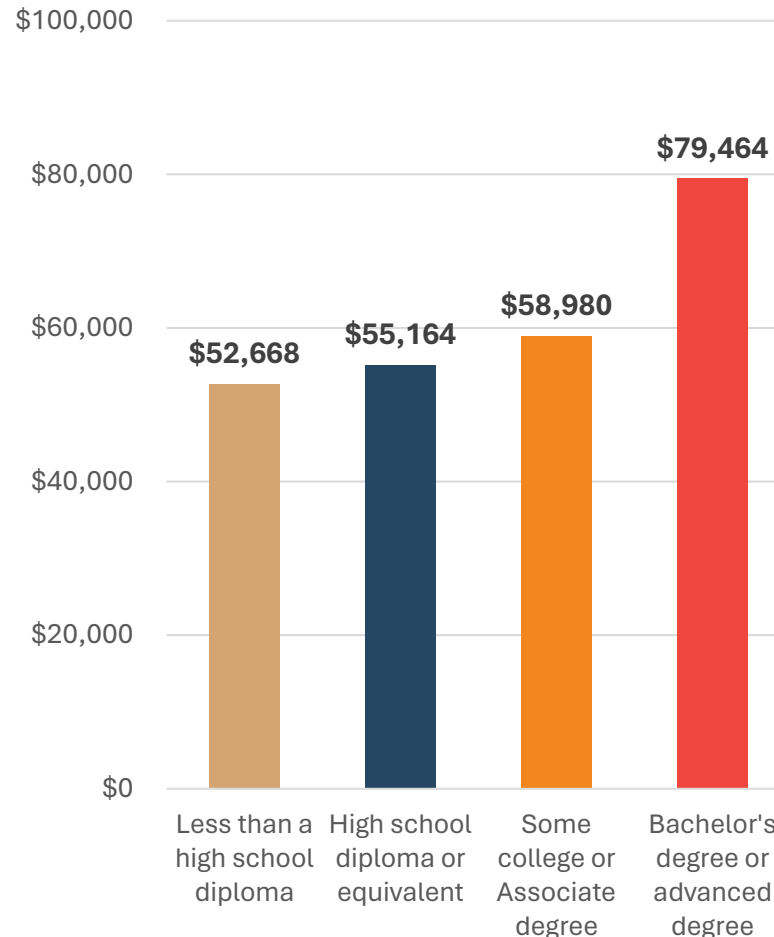
Have a household income of less than \$50,000 year. The largest household income category for those considering college in the next 5 years is \$0 to \$29,000 (36%)

Postsecondary education will provide the training Montana needs to meet workforce demand (and good wages to match).

Share of Jobs by Education Level



Average Annual Earnings (2022)



The majority of jobs (69%) in Montana will be available to those with postsecondary credentials by 2031.

Nearly **75%** of graduates from Montana postsecondary institutions work in Montana at some point in the ten years following graduation (MT DLI).

To remain competitive, especially given that Montana is a net-importer of college graduates, and to meet the state's workforce needs, Montana's public institutions must continue to increase resident student access to postsecondary opportunities (NCHEMS).

Chart Data Source: Georgetown University Center on Education and the Workforce forecast using data from the US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS); US Census Bureau, American Community Survey (ACS); US Bureau of Labor Statistics; HIS Markit; and Lightcast.

Earnings Data Source: US Census Bureau. Quarterly Workforce Indicators.

MT DLI. Watson, A., Wagner, B., & Trautman, E., Montana Post-Secondary Workforce Report (2022). Retrieved March 6, 2024, from https://lmi.mt.gov/_docs/Publications/LMI-Pubs/Special-Reports-and-Studies/MTCollegeReport2022.pdf.

Drivers of Value/Recommendations

Completion is a linchpin for ROI. MUS institutions graduate students at or just below national averages for on-time 2- and 4-year programs. Some credit, no degree, and debt mean low ROI for students and stranded investment for the state. Montanans earning the state's median income—about \$56k—experience more barriers to access and are less likely to complete without additional supports.

Affordability matters. Affordability continues to be the most significant barrier in enhancing higher education's value for individuals and the state. Policy should consider options to enhance affordability including FAFSA completion.

Barriers to access are real (and perceived). The MUS must address both. Affordability impacts access for many Montanans, especially those from rural areas and those in Montana's middle-income bracket and below. Yet, given that most Montanans form opinions about higher education based on the experience of friends and family, the MUS can continue to increase value by undertaking initiatives that promote positive experiences for more Montanans.

Citations

Slide 2 Montana Resident Survey - Perceptions Of Higher Education. 2023. Respondent sample overview.

Slide 4 Montana Resident Survey - Perceptions Of Higher Education. 2023. Questions 9 & 10.

Slide 5 Montana Resident Survey - Perceptions Of Higher Education. 2023. Questions 5 & 9.

Slide 6 College affordability table. Created using IPEDS AY 2020-2021 survey. Median household income from 2020. American Community Survey 2016- 2020 5-year estimates (accessed via IPUMS). MUS headcount enrollment F2022.*Net price includes tuition, room/board, and fees less all grant and scholarship financial aid (institutional, state, and federal).

Slide 7 College completion wage outcomes chart. Created using wage outcomes 1-, 3- and 5-years after departure from MUS enrollment for completers and non-completers. Wage data sourced from MT DLI unemployment insurance programs. Figures report outcomes for Montana residents who are employed in-state for at least one quarter during the reported year. All wages expressed in constant 2019 dollars. Year 1 reports students departing 2010-2016. Year 3 students departing 2010 -2014. Year 5 students departing 2010-2012.

Slide 7 Montana Resident Survey - Perceptions Of Higher Education. 2023. Questions 8 & 9.

Slide 8 Montana Resident Survey - Perceptions Of Higher Education. 2023. Questions 7, 8, 9, 10 & 20.

Slide 9 Share of jobs pie chart Anthony P. Carnevale, Nicole Smith, Martin Van Der Werf, and Michael C. Quinn. *After Everything: Projections of Jobs, Education, and Training Requirements through 2031*. Washington, DC: Georgetown University Center on Education and the Workforce, 2023. cew.georgetown.edu/Projections2031.

Slide 9 Average annual earnings by educational attainment. U.S. Census Bureau. (2024). Quarterly Workforce Indicators (1990-2023) [computer file]. Washington, DC: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program [distributor], accessed on March 6, 2024 at <https://qwiexplorer.ces.census.gov/{R2024Q1}> [version]

Slide 9 Montana net-importer of graduates. NCHEMS Information Center. College Participation Rates: Import/Export Ratio of College-Going Students. Retrieved 2024, at <http://www.higheredinfo.org/dbrowser/index.php?submeasure=61&year=2018&level=&mode=definitions&state=>. Sourced from The U.S. Department of Education, National Center for Education Statistics. Residence and Migration of All Freshmen in Degree-Granting Institutions. <http://www.nces.ed.gov>