

# PERCEPTIONS OF HIGHER EDUCATION IN MONTANA

2024



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# OVERVIEW

The Montana University System (MUS) provides education and training that benefits residents' career and economic success and that is essential to the state's economy. To enhance the value of higher education to individuals and the state, the MUS has undertaken a years' long effort to identify drivers of value, define metrics that help measure and communicate that value, and develop and advance strategies to increase value. The Office of the Commissioner of Higher Education surveyed Montanans on their perceptions of higher education to help identify barriers to realizing value and to inform strategies that can enhance the value of a postsecondary education for residents and for the state.

The survey, administered with generous support from the Lumina Foundation, gathered insights from a sample of Montanans representative of the state's population across region, town size, income levels, education levels, age, race, and gender. The findings, administered in July 2021 and September 2023, represent the largest sample of Montanans surveyed on postsecondary education.

In 2021 and again in 2023, the survey findings suggest that Montanans overwhelmingly value higher education because of its career and wage benefits to individuals and its benefit to state and community workforce and economic development. Yet, Montanans also report that there are significant barriers to realizing this value. The following report details findings from the survey along with data on college experience, wage outcomes, employment and workforce. Together, this data set and survey findings provide a framework to define and enhance the value that Montana's public postsecondary institutions can provide to Montanans, their communities, and state workforce development efforts.

# PERCEPTIONS OF HIGHER EDUCATION 2023 SURVEY REPORT



## CONTENTS

<b>Key Survey Findings.....</b>	<b>4</b>
<b>Summary of Respondents.....</b>	<b>5</b>
<b>Why Montanan’s Value Higher Education.....</b>	<b>6</b>
<b>Barriers to Realized Value.....</b>	<b>13</b>
<b>Drivers of Value.....</b>	<b>25</b>
<b>Key MUS Value Initiatives.....</b>	<b>26</b>
<b>Citations.....</b>	<b>29</b>

**Montanans believe in the value of higher education for themselves and for their communities.**

1. **Residents believe that all Montanans should have the opportunity to access higher education.** The vast majority (88%) of Montanans believe that residents should have the opportunity to access higher education.
2. **Montanans believe that higher education benefits themselves and benefits the state.** 72% of Montanans believe that higher education leads to a better career. More than  $\frac{3}{4}$  of Montanans (77%) believe that higher education benefits communities beyond just those who earn a degree, and 82% believe that Montana's investments in higher education benefit the state.

**Montanans believe that public higher education delivers on this value.**

1. **Residents continue to value knowledge and skills that clearly lead to a career or job and believe that public institutions in the state deliver on this value.** In fact, 63% of jobs paying over \$50k in the next ten years will likely go to degree holders.
2. **A majority (66%) of Montanan's believe there is the right information about attending college and availability of financial support** (loans, scholarships, grants) for those who can get it. Awareness is not perceived as a key barrier.

**Yet, there are still barriers in realizing this value for individuals and the state.**

1. **Residents have significant concerns about the cost of higher education.** In 2023, about nine out of ten residents said the cost to attend college is too high for most people in their community. Even while the sticker price of an MUS education is low relative to peer institutions, the net price for the average Montanan making the state's median wage is between 20-30% of family income. For the 20% of Montanans in the lowest income bracket, net sticker price of a two-year education is 49% of household income. Of Montanans considering going to college in the next 5 years, 79% believe that there isn't a lot of help to pay for it.
2. **Montanans believe access to higher education is stratified.** Nearly half of residents (43%) believe rural Montanans do not have access to quality higher education options. However, 85% of Montanans who are considering attending college in the next five years feel that they would feel welcome in an online degree program.
3. **Some college, no degree reduces return on investment and could negatively influence community perception of value.** The wage outcomes for those with some college but no degree suggest a reduced return on investment. Furthermore, Montanans who are more likely to experience financial barriers to completion are also less likely to believe that those in their community had positive experiences in higher education.

# 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

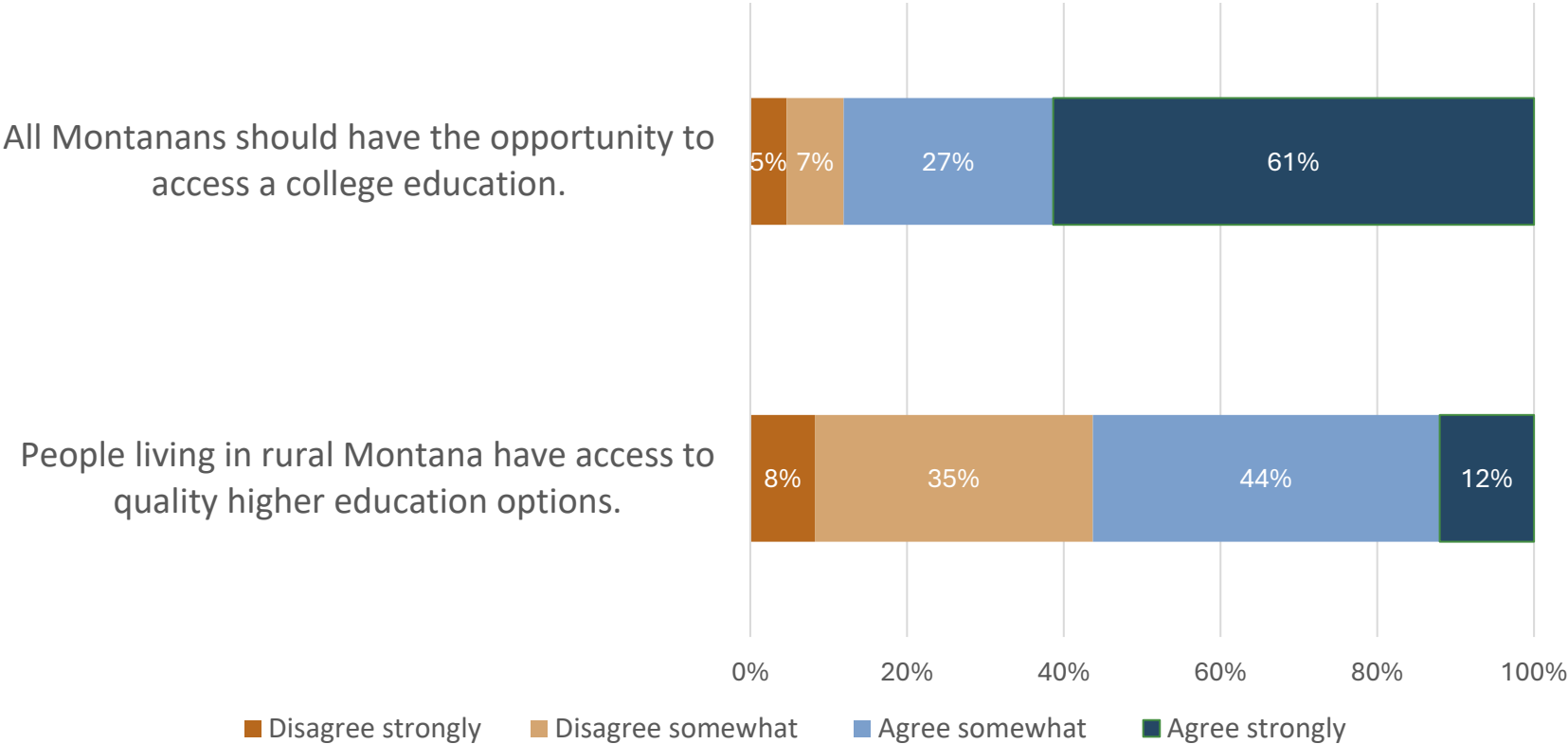
Age	2021		2023	
	Weighted Percent	Total Responses	Weighted Percent	Total Responses
18-34	26%	128	22%	140
35-44	18%	134	18%	149
45-54	13%	152	14%	116
55-64	21%	215	20%	179
65+	23%	442	26%	420

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.

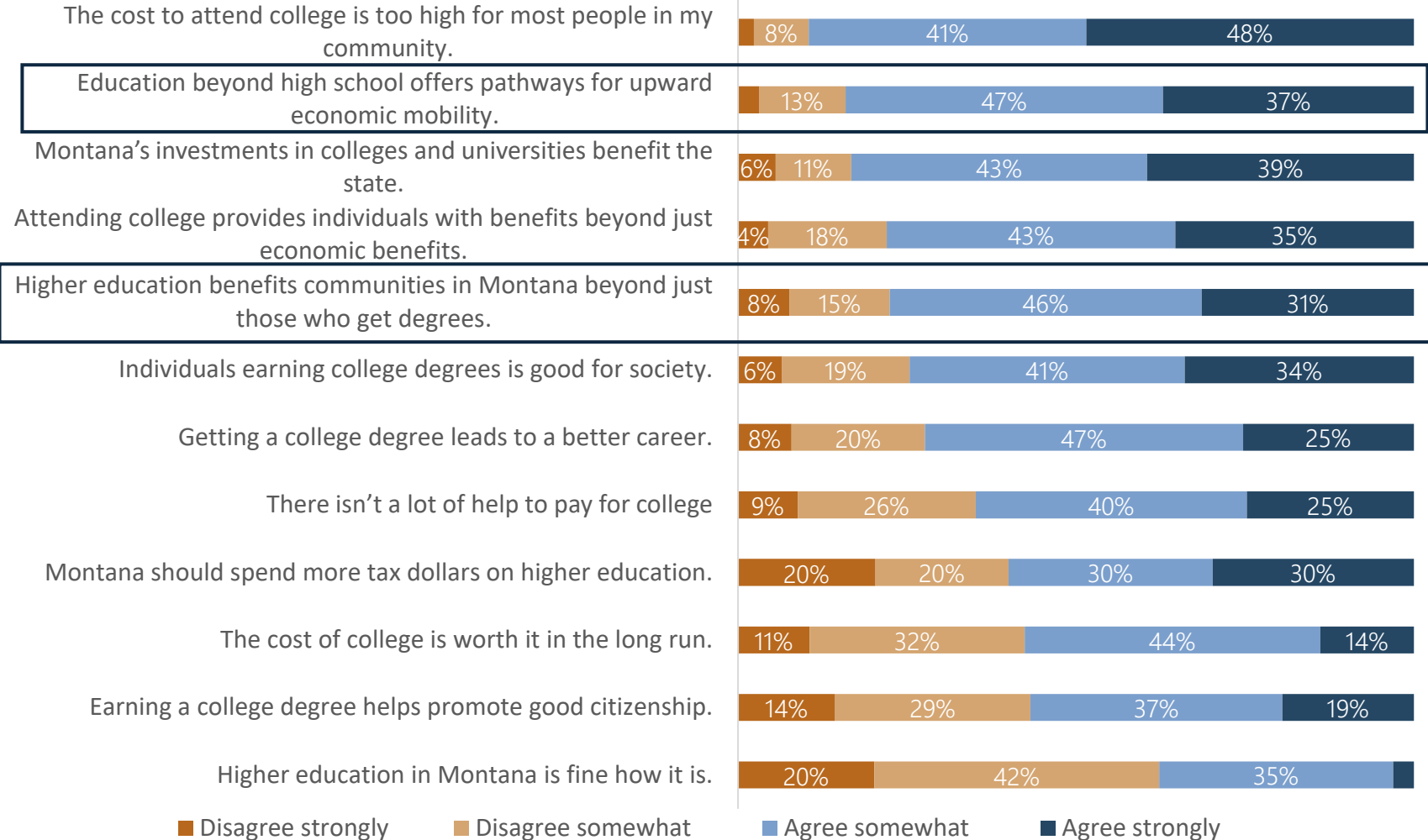
## Resident Agreement That...



Nearly nine out of ten residents (88%) agreed that ***all Montanans should have the opportunity to access a college education.***

# Earning a college degree provides a path to a better job and greater economic opportunity.

## Resident Agreement With Higher Education Statements



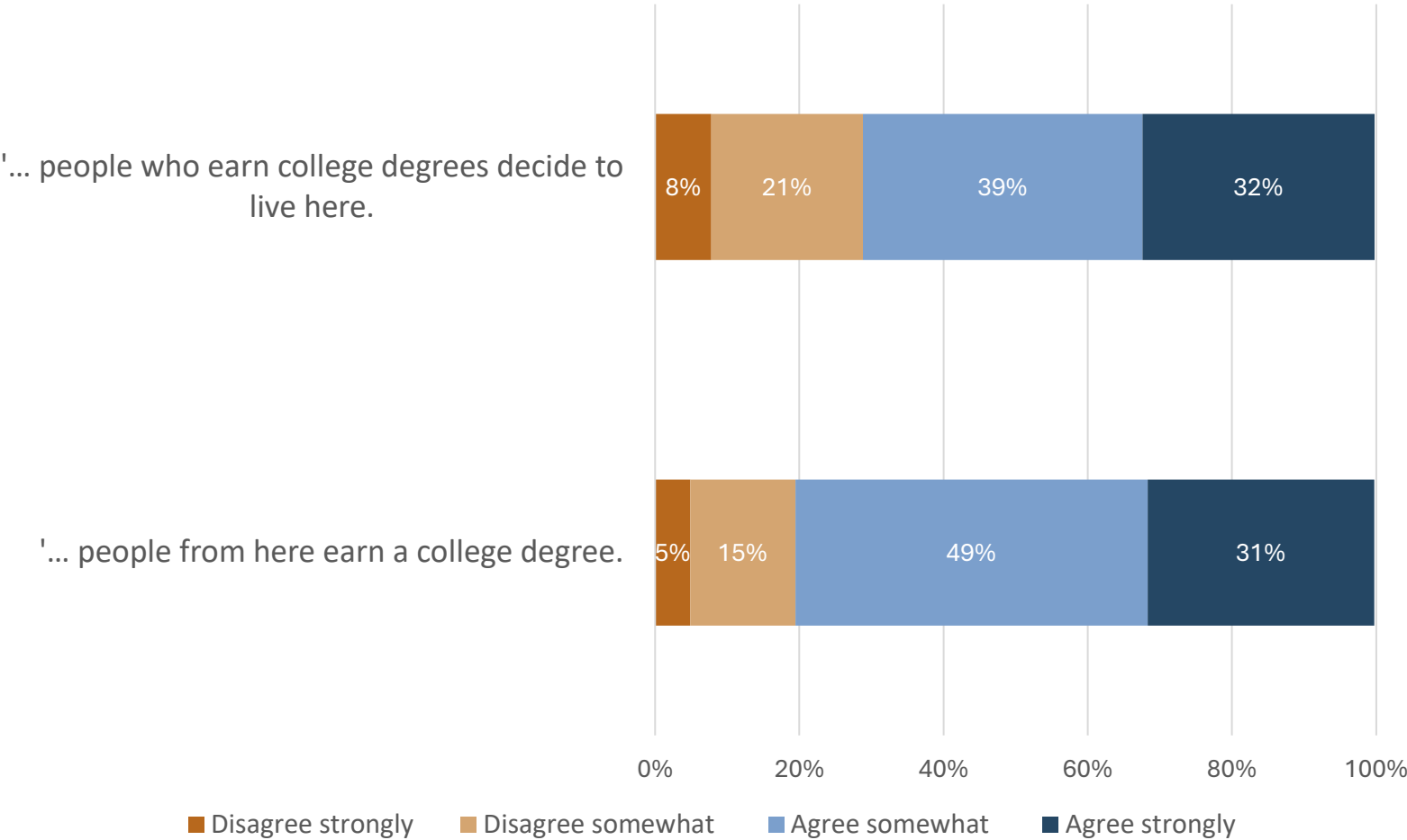
Survey findings suggest that Montanans' shared commitment to **access** is grounded in the belief that a college degree is **good for individuals** and **good for the state**.

**84%** of Montanans believe education beyond high school offers pathways for upward economic mobility.

**77%** of Montanans believe that higher education benefits communities beyond just those who get degrees.

# College degrees contribute positively to communities.

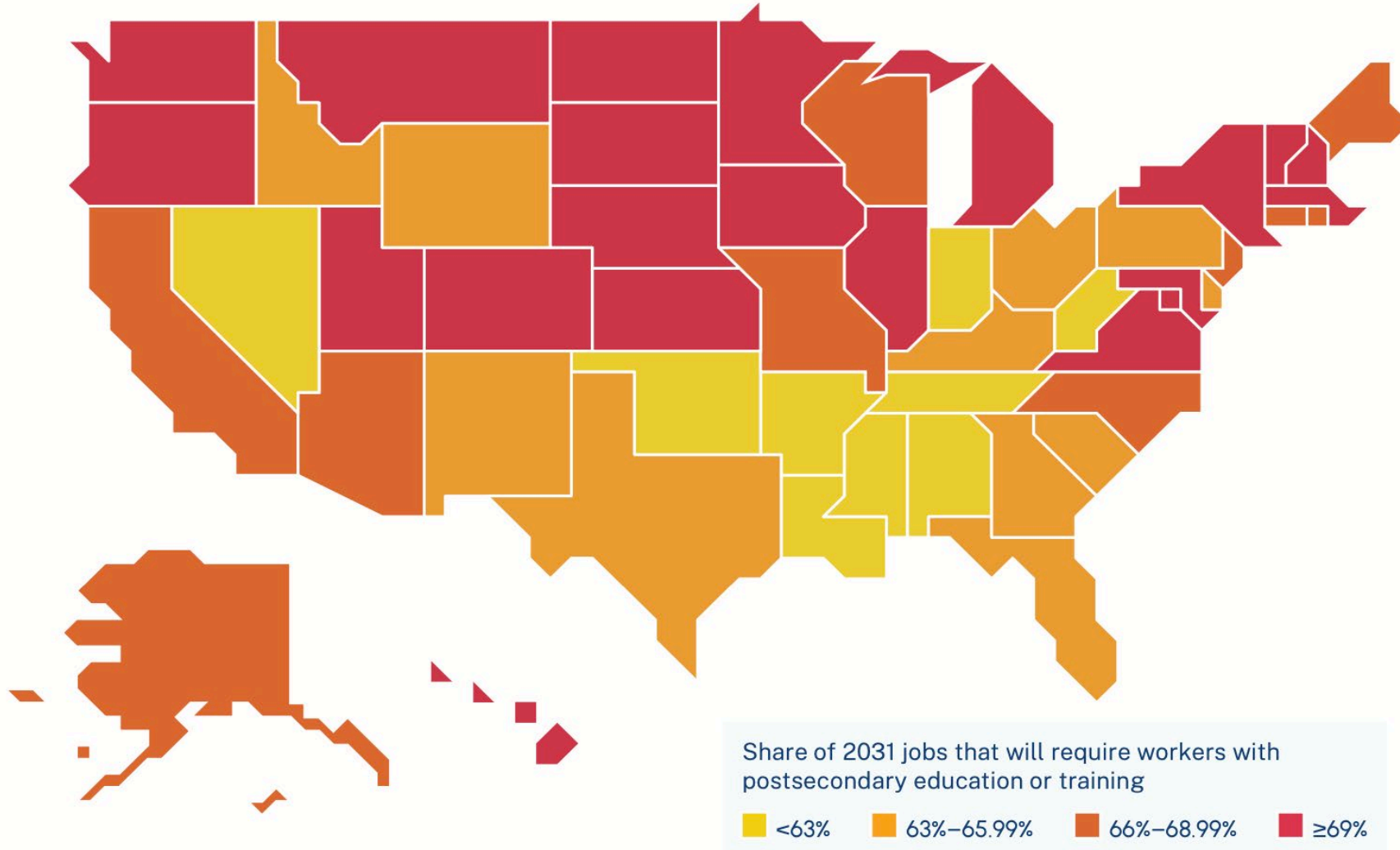
"My Community Benefits from..."



Most of the state's residents said that **communities benefit** when locals earn college degrees and when degree holders move to their community.



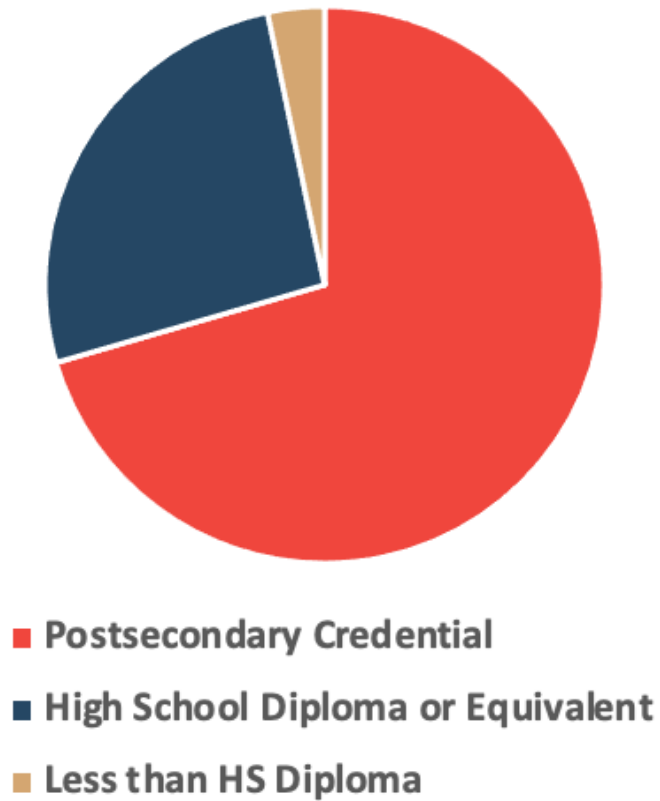
# Perceived benefits of higher education to local communities match projected trends in the workforce.



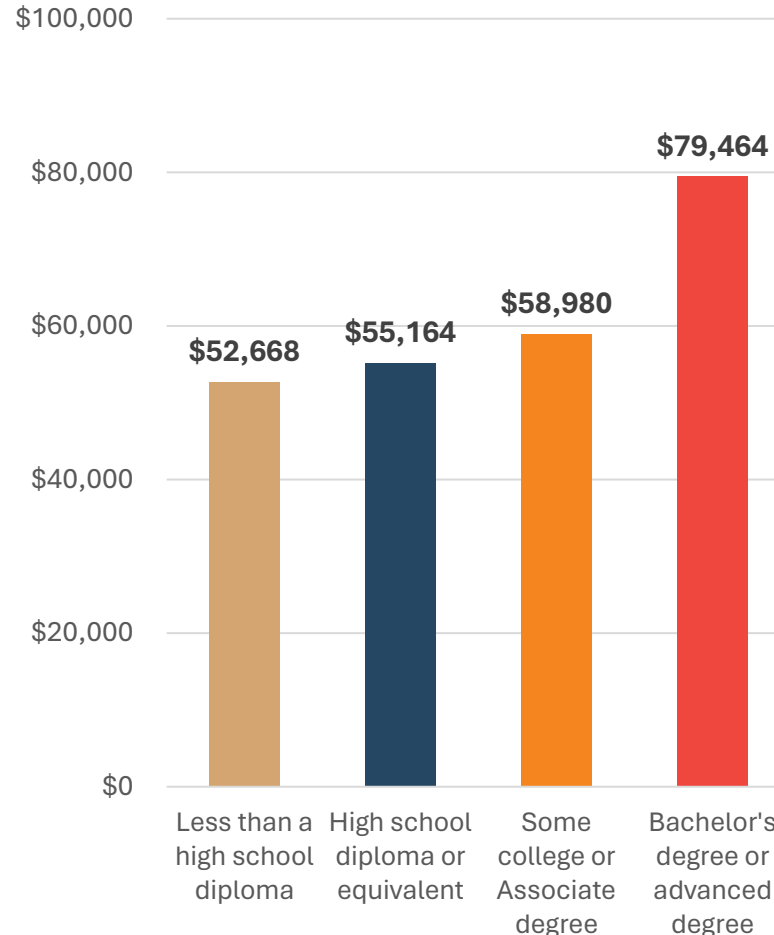
Montana is among the top fifth of states where jobs requiring some post-secondary education or training are projected to make up more than **69% of available jobs by 2031.**

# Postsecondary education also provides individuals with pathways to good jobs.

## 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).

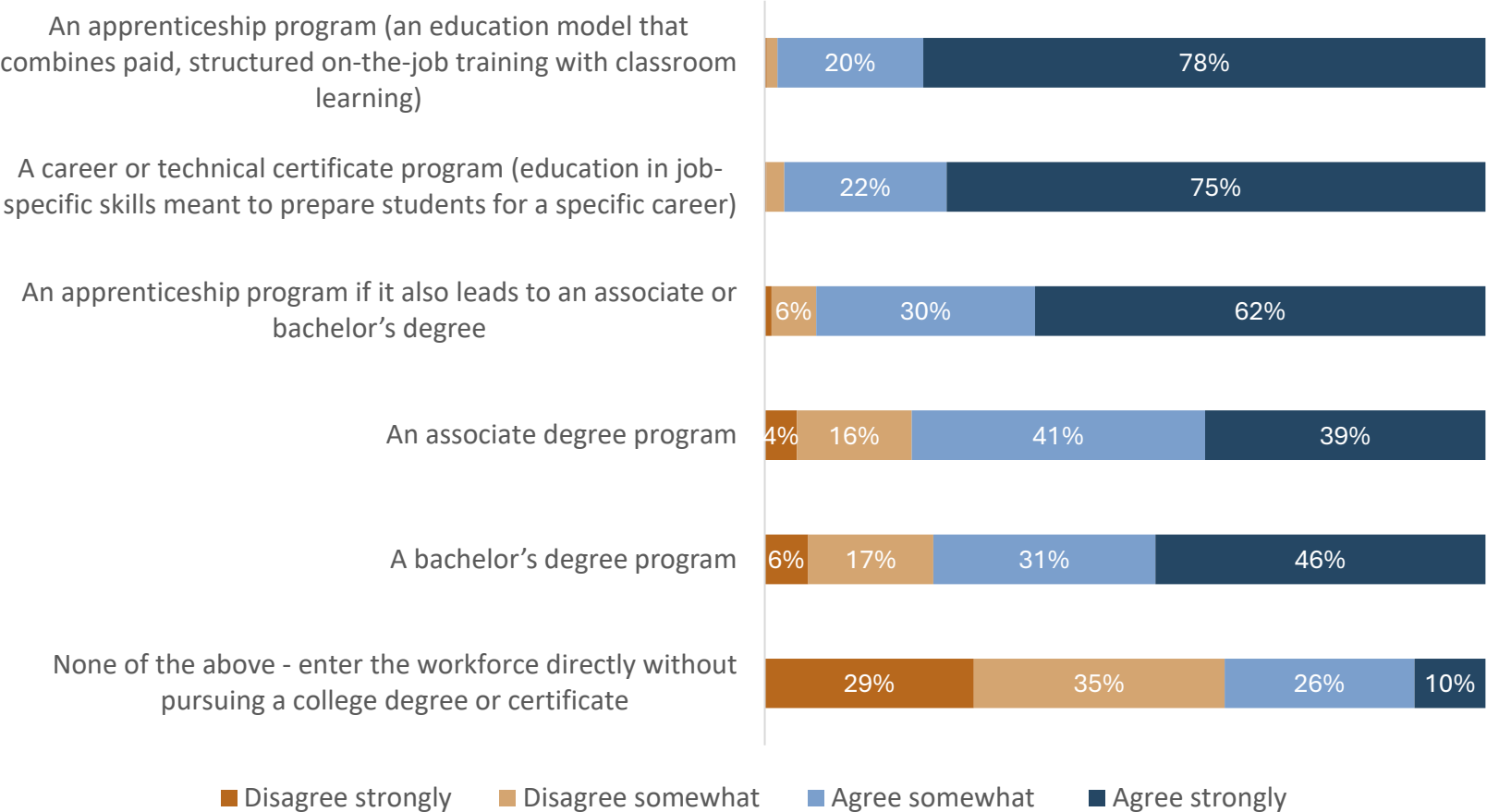
Chart Data Source: Georgetown University Center on Education and the Workforce forecast using data from the US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS); US Census Bureau, American Community Survey (ACS); US Bureau of Labor Statistics; HIS Markit; and Lightcast.

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](https://lmi.mt.gov/_docs/Publications/LMI-Pubs/Special-Reports-and-Studies/MTCollegeReport2022.pdf).

# Montanans value postsecondary opportunities that include experiential learning.

Residents Would Feel Comfortable Sending a Friend or Relative to...

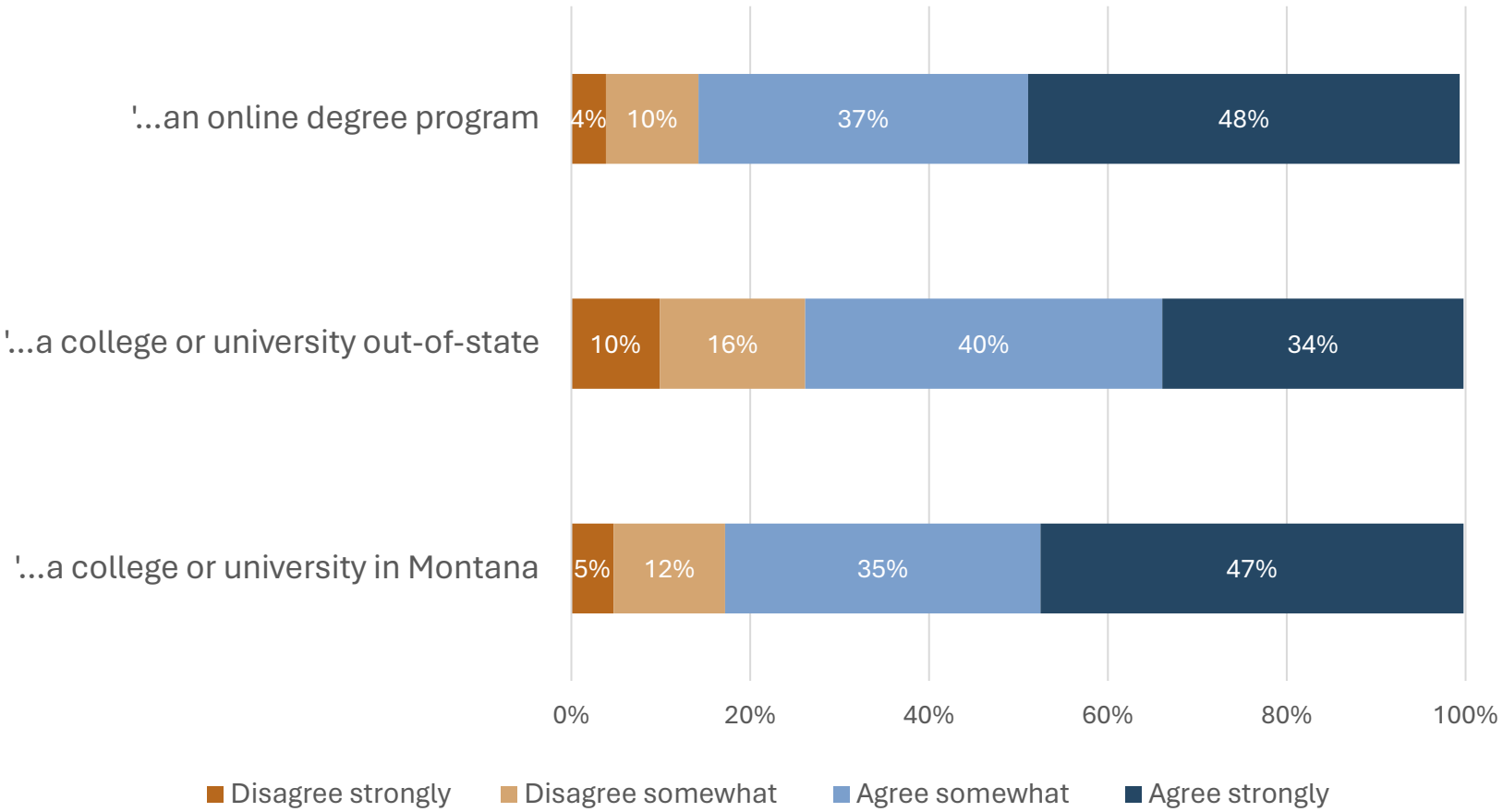


Montanans particularly value **education programs with work-based component.**

Most Montanans also **disagree** that they would recommend **entering the workforce *without* any sort of college degree or certificate.**

# Most Montanans feel welcome at in-state institutions.

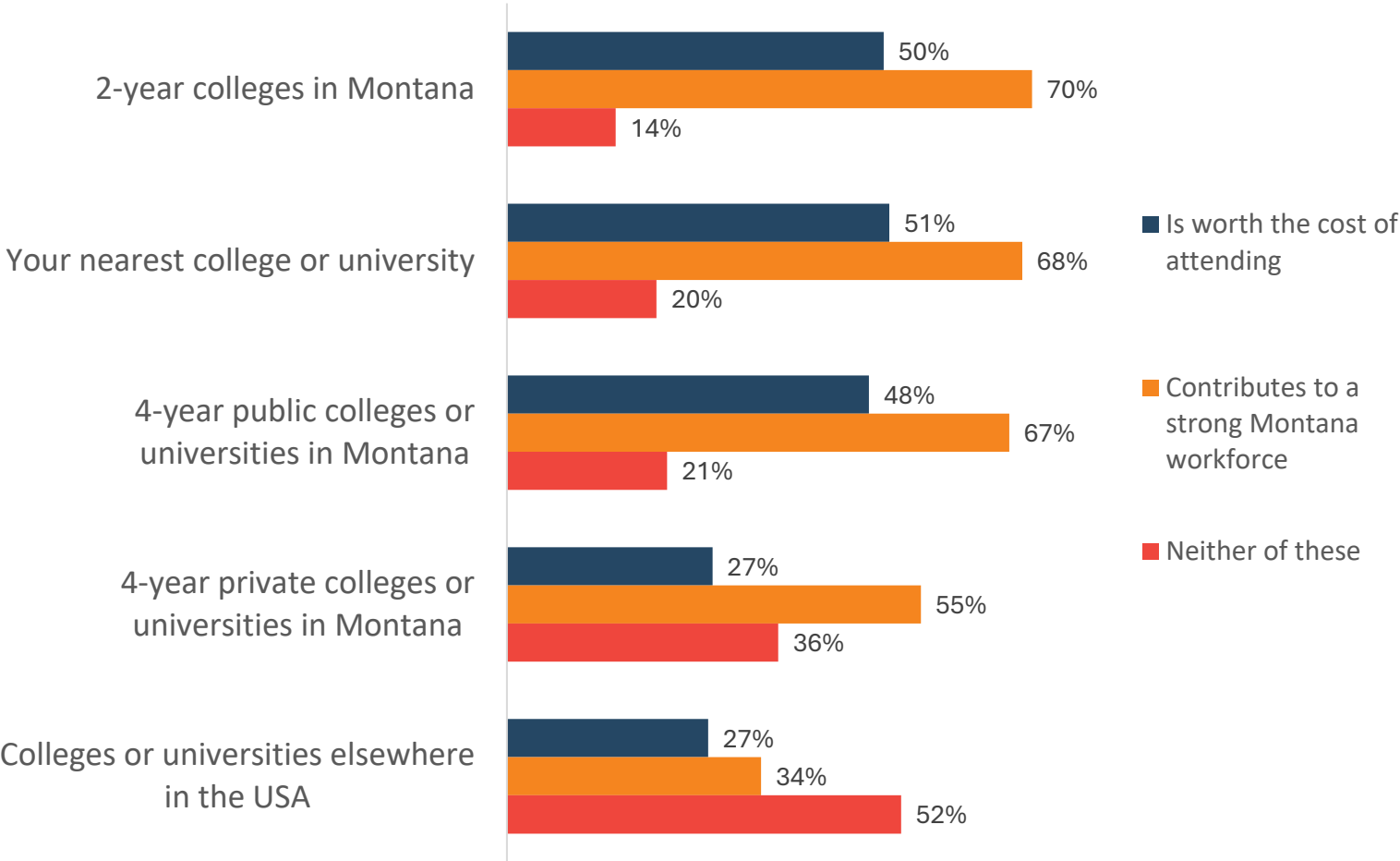
How much do you disagree or agree that: “A person like me would feel welcome at...”



Most Montanans (82%) agree “a person like them would feel welcome at a college or university in Montana.”

# While most Montanans value higher education for its individual and public benefit, barriers persist.

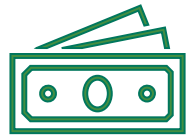
Percentage of Residents Saying That ...



The majority of Montanans believe that public higher education contributes to a strong Montana workforce.

However, residents are split on whether college is worth the cost.

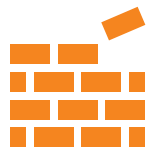
Even while Montanans recognize the value of higher education for themselves and their communities, barriers persist that prevent realized value.



The up-front cost is prohibitive for some.



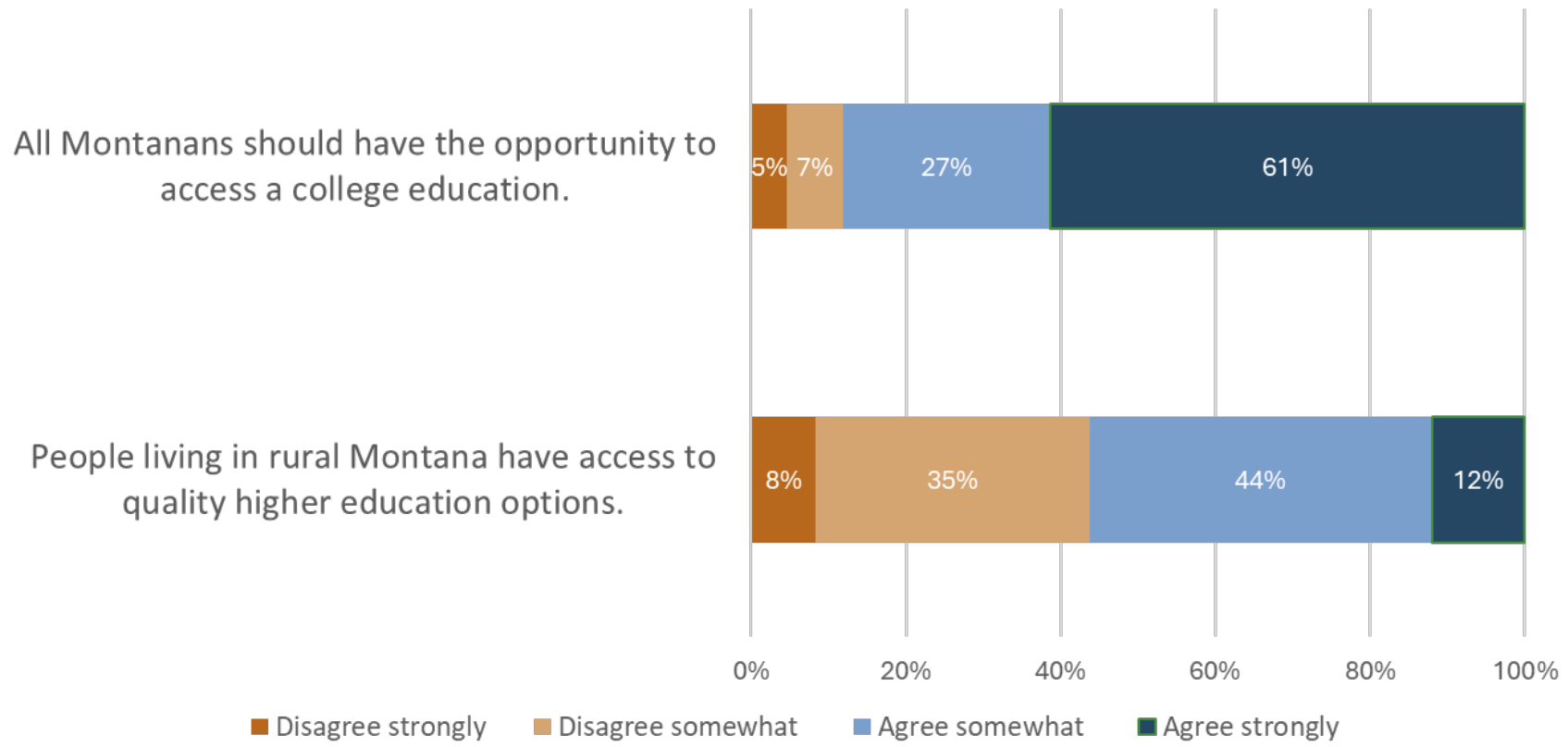
Access is stratified.



Barriers to completion reduce return on investment.

# Montanans perceive disparate access between urban and rural areas.

Resident Agreement That...



Montanans believe that geography impacts college access.

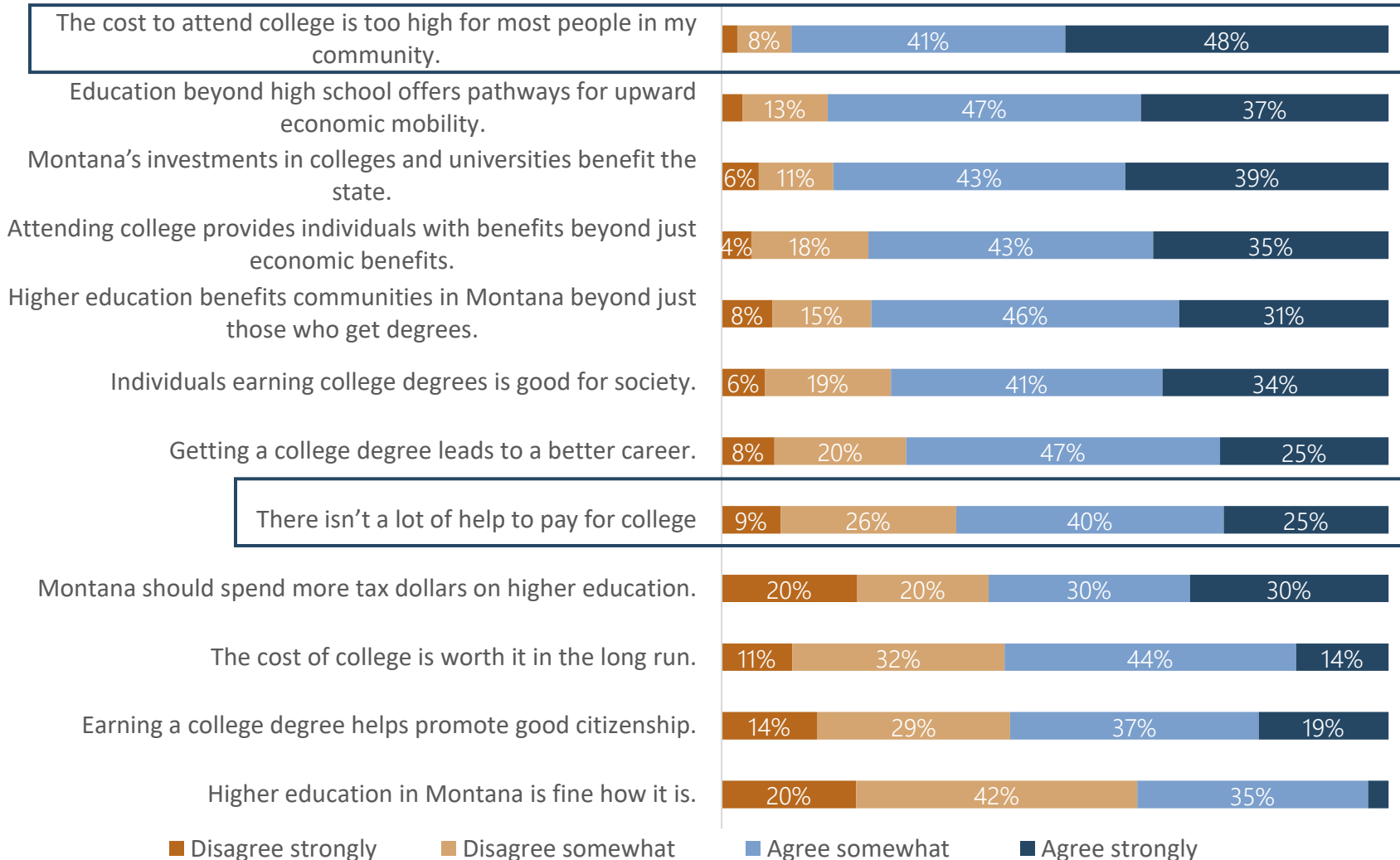
Almost half of residents believe **rural Montanan's do not have access** to higher education options.

As 96% of Montanans high schools are classified as rural, barriers to rural access are a critical focus area.



# Montanans also believe that cost is a significant barrier.

## Resident Agreement With Higher Education Statements



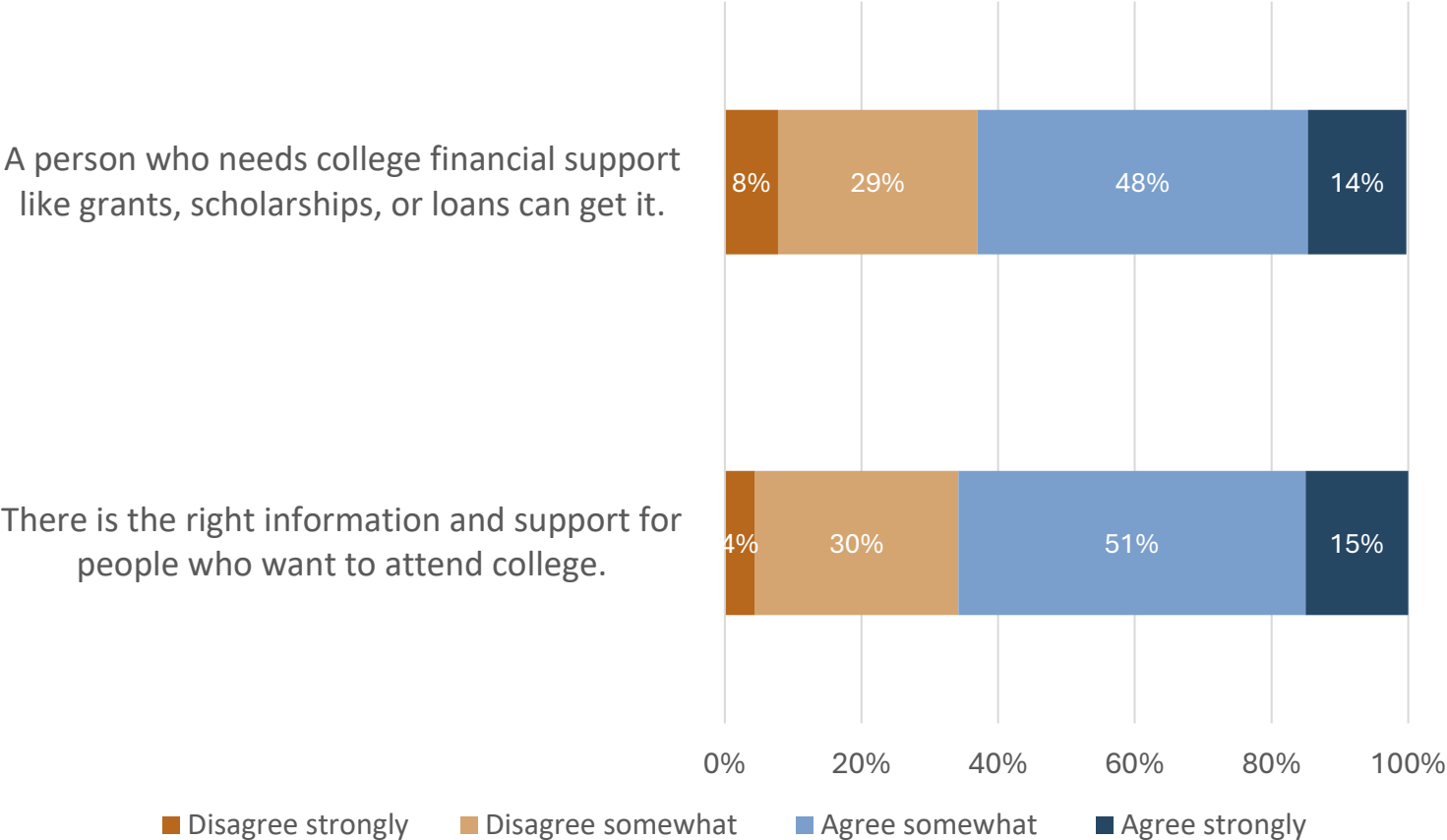
**89%** of all Montanans believe the cost to attend college is *too high for most people in their community.*

**65%** of Montanans agree, there *isn't a lot of help to pay for college.*



# Awareness of information and financial support is not perceived as a key barrier.

Resident Agreement With Higher Education Access Statements



Most residents said there is **the right information and support for people who want to attend college** (66%).

Similarly, most residents said a person who **needs college financial support like grants, scholarships, or loans could get it** (62%).

Importantly, most Montanans (53%) get their information from friends and family in their communities and not from media or other online sources.

# College affordability in Montana

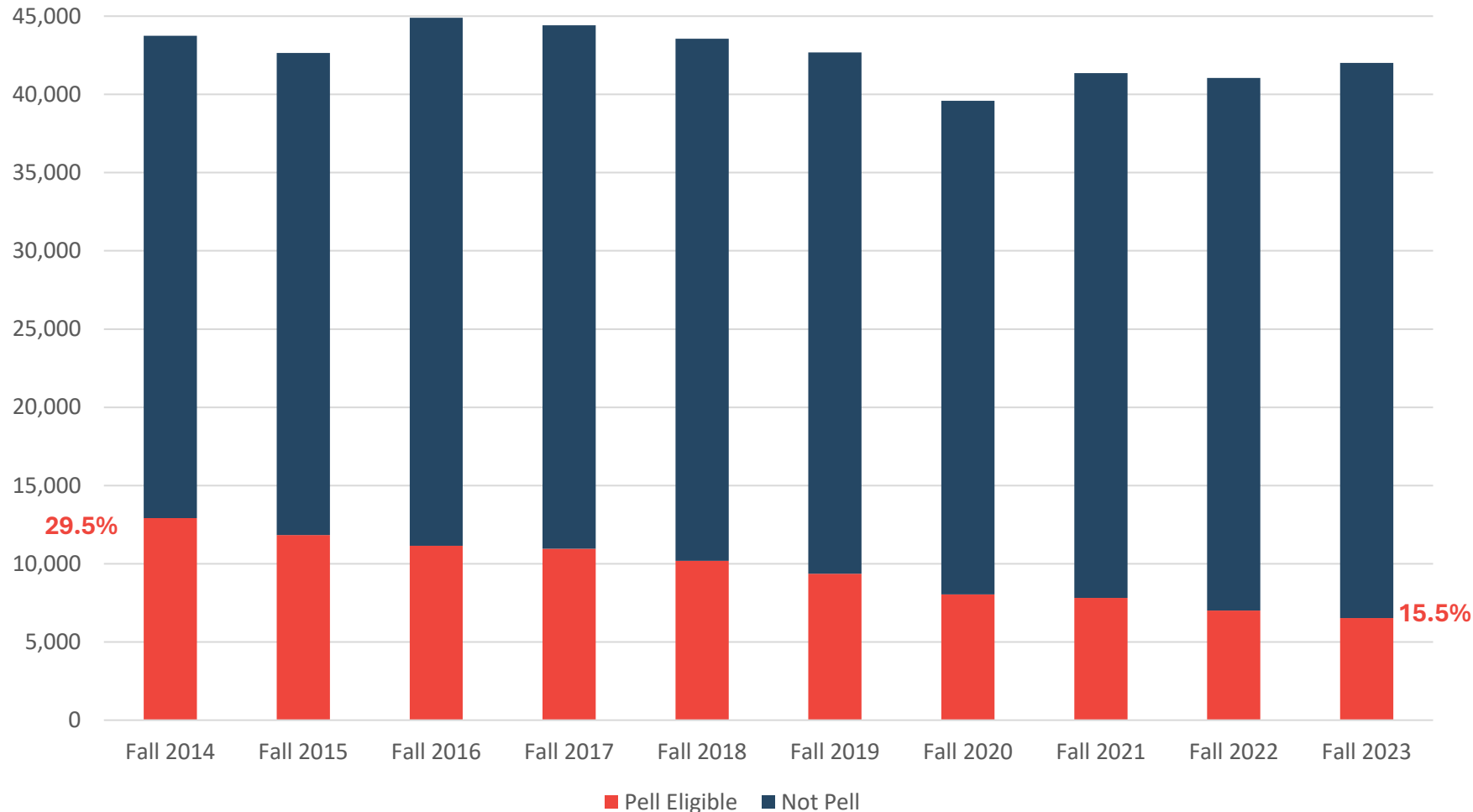
		Public Two-Year		Public Four-Year Nondoctoral		Public Research	
		24% of enrollment		16% of enrollment		60% of enrollment	
		Net Price*	% of avg. family income	Net Price*	% of avg. family income	Net Price*	% of avg. family income
<b>\$56k MT Median Family Income</b>	<b>\$0-30k (18% of households)</b>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

Data Source: 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).



# Affordability has impacted access and enrollment.

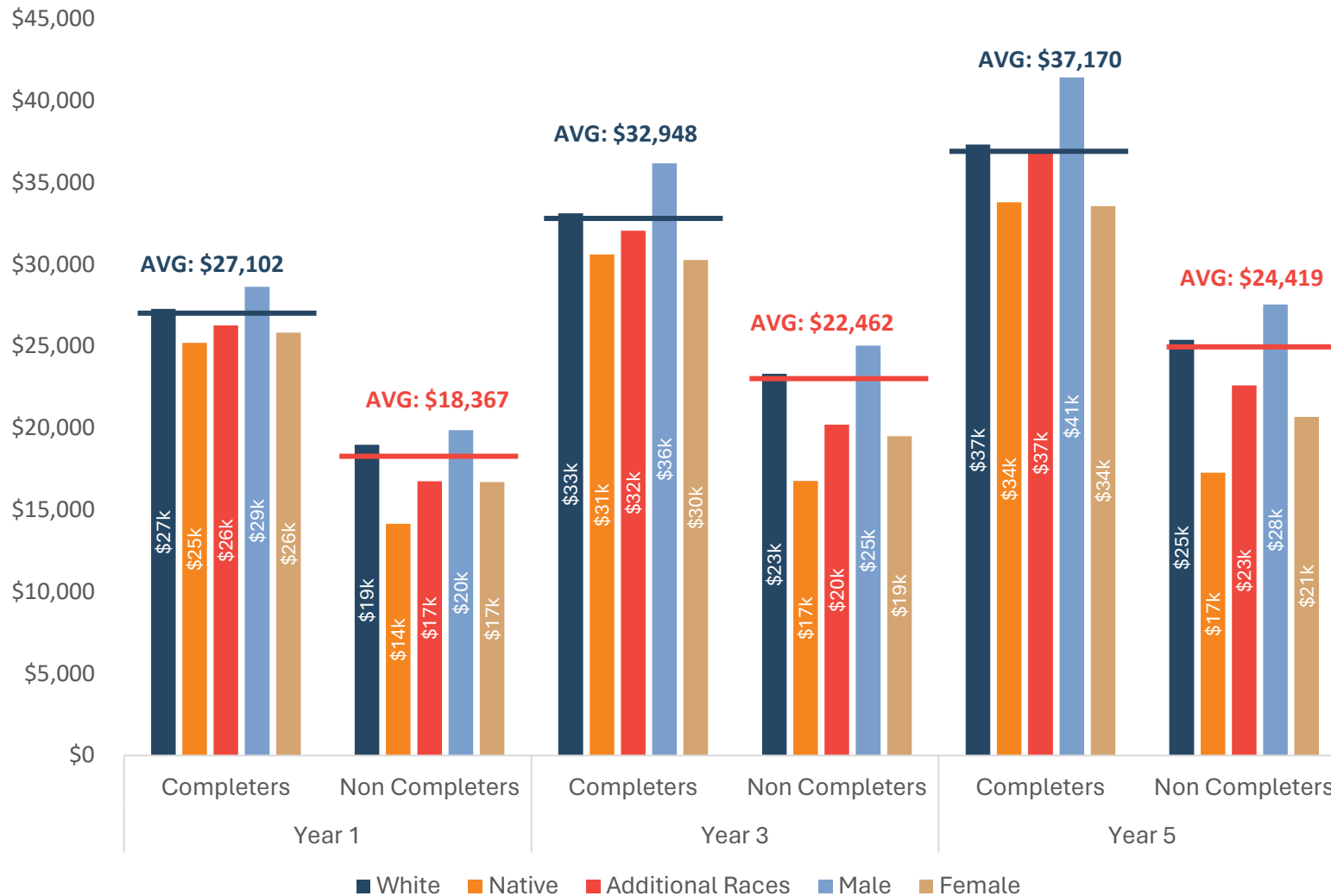
## MUS Headcount Enrollment



**Enrollment for students eligible to receive Pell grants has dropped dramatically** in the past decade **from 29.5%** of total MUS enrollment in 2014 to only **15.5%** in 2023.

Though Pell eligibility rules and the value of Pell grants relative to cost of attendance have changed overtime, Pell enrollment as a marker of low-income status is a useful proxy in the MUS because this federal aid represents the majority of available need-based aid for Montana students.

# College completion matters for return on investment.



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

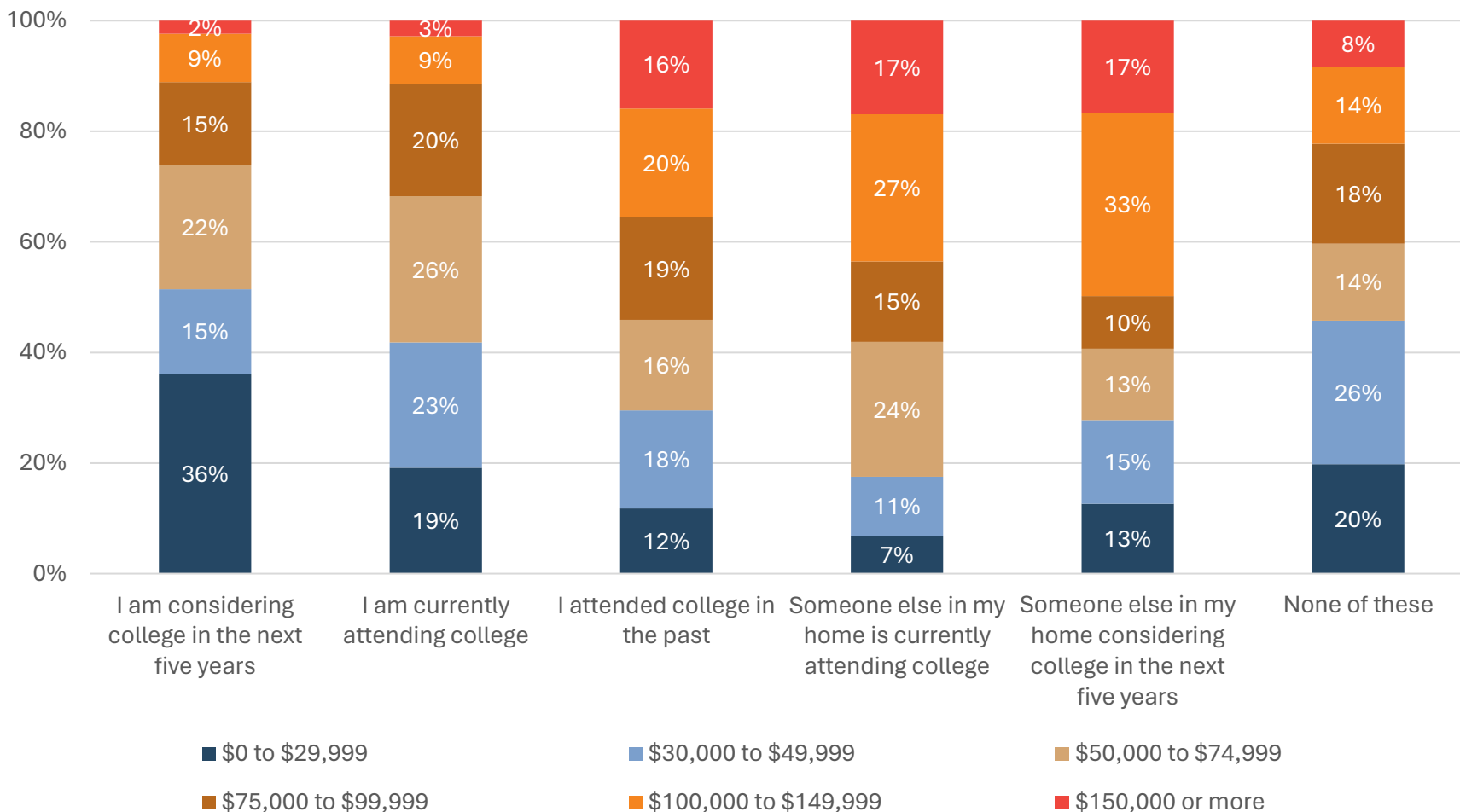
Yet, that positive return on investment is dramatically curtailed for those who do not complete degrees.

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.

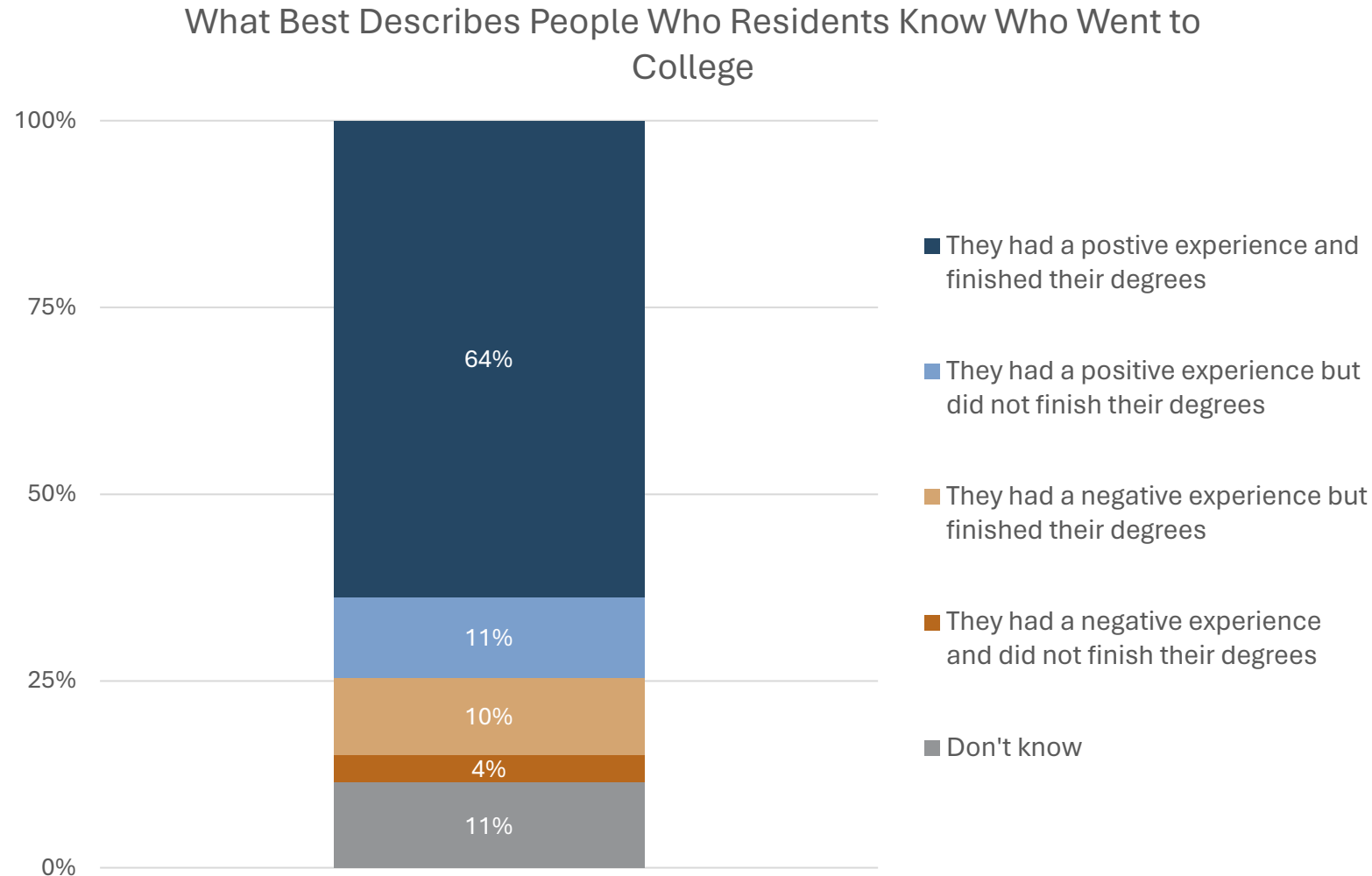
# Just over ½ of respondents who were considering college in the next five years have household incomes under \$50,000.

Household Income by College Going Status



Those respondents considering college in the next five years are also those who are **most likely to face barriers** to affordability yet also have the **potential for the greatest return-on-investment** through upward socioeconomic mobility.

# Some college, no degree influences individual ROI *and* potentially negatively impacts prospective students



Three out of four Montanans (75%) said the people who they know who went to college finished their degrees and nearly two out of three (64%) said they did so and had a positive experience.

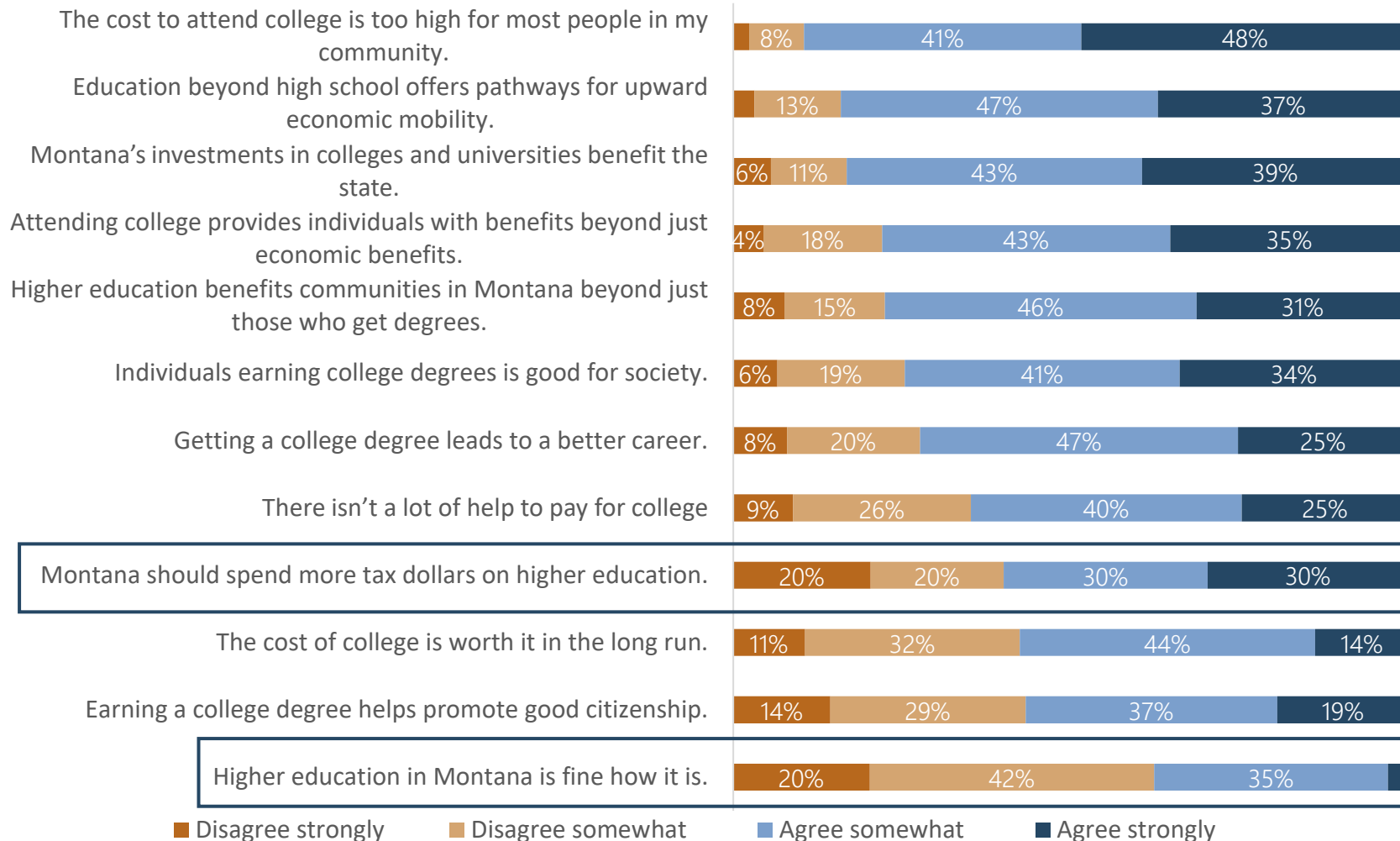
Residents with ***annual household incomes below \$50,000*** were less likely (51%) than those with higher incomes (71%) to say **most they knew had positive experiences and finished their degrees.**

Of those considering college in the next 5 years, most identified as having annual household income below \$50,000. **Completion matters not just for those enrolled, but also for informing peer groups considering college.**



# By many measures Montanans hold positive perceptions of higher education...

## Resident Agreement With Higher Education Statements



**...but Montanans believe more can be done for higher education.**

Despite 60% of respondents believing students should be most responsible for funding higher education, an equal amount of respondents agree the state should spend more tax dollars on higher education.

A similar number (62%) disagree that "higher education in Montana is fine how it is".

## 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%)



# DRIVERS OF VALUE

**Completion is a lynchpin 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.

# KEY INITIATIVES

**Montana10** is the Montana University System's signature student success initiative aimed at fundamentally transforming how the Montana University System (MUS) delivers on the promise of public higher education. Montana 10 is the MUS's response to an urgent call to action to address the state's workforce demands, increase graduation by focusing on student success, and realize a better return on investment for the state. Montana 10 leverages system-level policy, real-time data analytics, and evidence-based student support strategies to dramatically increase college completion and narrow equity gaps for Montana's low-income, American Indian, rural, and other underserved students. Early outcomes from pilot cohorts have demonstrated consistent **15 percentage point increases in retention** and **doubling of college completion rates**.

**Partnership with Ed Design Lab - The Montana Year to Career Initiative** maps pathways of stackable credentials to streamline the skills most relevant for immediate employment in high-demand industries while also mapping those credits on a track to an advanced degree. **These short-term credential pathways offer cost-effective, low-barrier entry to higher education programs** and provide multiple off-ramps and on-ramps for realized value.

**Developmental Education Reform** supports realized value by addressing accessibility, affordability and completion. By prioritizing college-level course placement for math and writing through updates to performance-based funding and policy, shifting from remedial developmental education models to co-requisite models, MUS data shows students pass their college-level courses sooner and save money on more direct academic pathways. **Developmental education reform is designed to meet increase access by creating pathways for all Montanans, regardless of prior academic preparation.**

# KEY INITIATIVES

**Resident Student Access Initiative** is a system-wide effort to develop a unified approach to resident student enrollment, financial aid, and success with the **goal of increasing the percentage of Montana high school graduates who attend and graduate from the Montana University System.** This initiative includes implementing and expanding the MUS Central Application and launching "ApplyMontana," the system's portal for college, career, and financial information.

**MUS Seamless System Initiative** builds on the system's commitment to access by **leveraging technology to deliver high-quality postsecondary opportunities in flexible modalities that still provide seamless experiences for students.** The MUS Seamless System Initiative will modernize and improve the quality of service for students and create a single, consistent digital learning environment across all campuses. It also aims to provide a single catalog of all courses available online in the MUS, creating a one-stop-shop for students to discover, register for, and access all online courses available in the MUS, regardless of a student's home campus or physical location. Fully developed, an integrated online course catalog will triple or quadruple the number of courses available to students attending smaller MUS campuses.

**MUS Sprint Degrees** are accelerated degree programs designed to support Montana's workforce in the highest need areas. Through curriculum redesign and year-round course schedules, students are able to graduate faster and enter the workforce sooner. Additionally, Sprint Degrees are designed and supported by Montana industry. Industry partners are asked to support students through 1) tuition assistance 2) clinical and work-based learning placement 3) future employment or a combination of the three. By increasing affordability and shortening time to degree, MUS Sprint Degrees make the value of higher education more accessible to more Montanans.



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**For more information, contact the Office of the Commissioner of Higher Education:**

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Joseph Thiel, Deputy Commissioner Academic, Research & Student Affairs, [jthiel@montana.edu](mailto:jthiel@montana.edu)

- Slide 2** **Survey Overview.** The survey was administered in both 2021 and 2023 by Corona Insights, a non-partisan market research firm. The survey went out to 10,000 Montana households with a strong response rate of 10% (1,028 completed surveys). Responses were statistically weighted to represent the state's adult population on key demographics.
- Slide 5** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Respondent Overview.**
- Slide 6** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 10.**
- Slide 7** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 9.**
- Slide 8** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 12**
- Slide 9** **Map of 2031 job projections.** Anthony P. Carnevale, Nicole Smith, Martin Van Der Werf, and Michael C. Quinn. *After Everything: Projections of Jobs, Education, and Training Requirements through 2031 | State Report*. Washington, DC: Georgetown University Center on Education and the Workforce, 2023. [cew.georgetown.edu/Projections2031](https://cew.georgetown.edu/Projections2031).
- Slide 10** **Share of jobs 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](https://cew.georgetown.edu/Projections2031).
- Slide 10** **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 10** **MT DLI citation** 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](https://lmi.mt.gov/_docs/Publications/LMI-Pubs/Special-Reports-and-Studies/MTCollegeReport2022.pdf).
- Slide 11** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 1.**
- Slide 12** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 11.**
- Slide 13** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 5.**
- Slide 15** **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 10.**
- Slide 15** **Rural district classification.** U.S. Department of Education, National Center for Education Statistics, Common Core of Data, Public School Universe, 2013-2014.

- Slide 16**      **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 9.**
- Slide 17**      **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 10.**
- Slide 18**      **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 19**      **Enrollment by Pell status chart.** MUS data warehouse.
- Slide 19**      **Pell as a proxy.** Delisle, J. (2017b, October 12). The Pell Grant proxy: A ubiquitous but flawed measure of low-income student enrollment. *The Brookings Institution*. Retrieved from <https://www.brookings.edu/articles/the-pell-grant-proxy-a-ubiquitous-but-flawed-measure-of-low-income-student-enrollment/>.
- Slide 20**      **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 21**      **Montana Resident Survey - Perceptions Of Higher Education. 2023. Questions 8 & 20.**
- Slide 22**      **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 7.**
- Slide 23**      **Montana Resident Survey - Perceptions Of Higher Education. 2023. Question 9.**
- Slide 24**      **Montana Resident Survey - Perceptions Of Higher Education. 2023. Questions 7, 8, 9, 10, & 20.**