

AGENDA ITEM

A-3. UNC System Fall Enrollment Report..... Kimberly van Noort

Situation: One of the primary responsibilities given to the University of North Carolina Board of Governors is to “...foster the development of a well-planned and coordinated system of higher education.” One of the key activities the Board oversees in the execution of this responsibility is periodically evaluating enrollment trends. The 2021 Fall Enrollment Report provides an overview of trends and statistics for the current academic term.

Background: Student enrollment is a key metric for evaluating institutional health and stability. As enrollment funding represents one of the largest financial components of institutional budgets, significant shifts in growth or decline can have a substantial financial impact. National data indicates that student enrollment is flat or declining in colleges and universities. Enrollment in the UNC System ran counter to this trend for the fall of 2021, however, with a new record set for the eighth straight year. The 2021 Fall Enrollment Report also provides information related to the monitoring of Board policy items, including non-resident enrollment levels.

Assessment: The 2021 Fall Enrollment Report is provided for review and discussion.

Action: This item is for discussion only.



THE UNIVERSITY OF NORTH CAROLINA SYSTEM

2021 UNC System Fall Enrollment Report

November 17, 2021

University of North Carolina System
Chapel Hill, North Carolina

2021 UNC System Fall Enrollment Report

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2021 UNC System Fall Enrollment Report

Introduction and Summary

When the University of North Carolina (UNC) was redesignated in 1972 to include all 16 public four-year institutions of higher education, one of the primary responsibilities given to the Board of Governors (Board) was to “...foster the development of a well-planned and coordinated system of higher education.” One of the key activities the Board oversees in the execution of this responsibility is periodically evaluating enrollment trends and making projections about the future. The fall 2021 Enrollment Report presents the trends in enrollment across the 16 constituent universities of the UNC System.

- **Overall Enrollment.** The fall 2021 total UNC System headcount enrollment was 244,508 students, an increase of 2,062 students (.85 percent) from the previous fall and the largest total enrollment in the history of the UNC System. Eleven institutions saw their total student headcount increase and five saw headcount decreases. Decreases in total undergraduate student enrollment was offset by increases at the graduate level across the system.
- **New Student Enrollment.** Following two years of declines, new first-time freshmen enrollment increased by just under 2,000 students, setting a new record. New graduate student enrollment growth remained strong, setting a new record, and grew for the eighth straight year. New transfer student enrollment declined for the third straight year, however.
- **Enrollment by Race/Ethnicity.** Underrepresented minority student enrollment increased as a percent of total student enrollment for the ninth consecutive year. One out of every three students in the UNC System is now classified as an underrepresented minority student.
- **Resident/Non-Resident First-Time Freshmen.** The percent of first-time freshmen from outside of North Carolina increased from 13.4 percent in 2020 to 15.9 percent in 2021. This represents a significant one-year increase, and the 2021 percentage is the highest in the past 10 years.
- **Demographic Trends.** External projections indicate a significant dip in North Carolina high school graduates in 2022 and significant national declines over the next decade.

Interactive Data Dashboards

The UNC Data Dashboards are interactive reports sourced from an online database that provide students, parents, policymakers, and taxpayers expanded access to detailed system data on selected core measures. This fall enrollment report is intended to provide an overview of key trends and data points; for additional detailed and customizable information, please visit the interactive data dashboards linked below.

- [Enrollment](#)
Explore enrollment trends across the UNC system; learn more about who our students are and where they come from.
- [Transfer Students](#)
Examine trends in transfer student enrollment, first-year performance, and graduation rates.
- [Freshmen Admissions and Performance](#)
Students, parents, schools, and school district officials can see admissions and performance information about high school graduates pursuing degrees at all the universities. This includes graduation rate information, peer comparisons, and more.
- [Degrees](#)
With over 200 academic programs across our institutions, UNC System students earn degrees in a variety of critical fields. Learn more about degrees awarded over the past 10 years, and sort the data by level of degree, field of study, and demographics.

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Overall Fall 2021 Enrollment

For the eighth straight year, the UNC System set a record enrollment, with a total student headcount of 244,508. This represents an increase of 2,062 students or 0.85 percent over the fall 2020. This runs counter to national trends,¹ where enrollment decreases are becoming common. While overall headcount enrollment increased, trends differ between undergraduate and graduate students. At the undergraduate level, UNC System enrollment decreased by 652 students (0.34 percent) from 2020 to 2021. The fall 2021 undergraduate enrollment of 191,518 is also slightly lower than the 2019 figure of 191,632. Graduate enrollment, however, continues to exhibit strong growth across the UNC System. Total graduate enrollment was 52,990 for fall 2021, which was an increase of 2,714 students or 5.40 percent from 2020 to 2021. This is the third consecutive year that growth in graduate enrollment has been larger on a percentage basis than undergraduate enrollment, and the second consecutive year that it has outpaced undergraduate enrollment on a student basis.

Enrollment figures have also varied by individual UNC constituent institutions. Between fall 2020 and fall 2021, 11 institutions increased and five decreased in total enrollment. Figure 1 and Tables 1 and 2 provide additional information on overall fall enrollment data.

Figure 1: UNC System Fall Headcount Enrollment, 2012—21

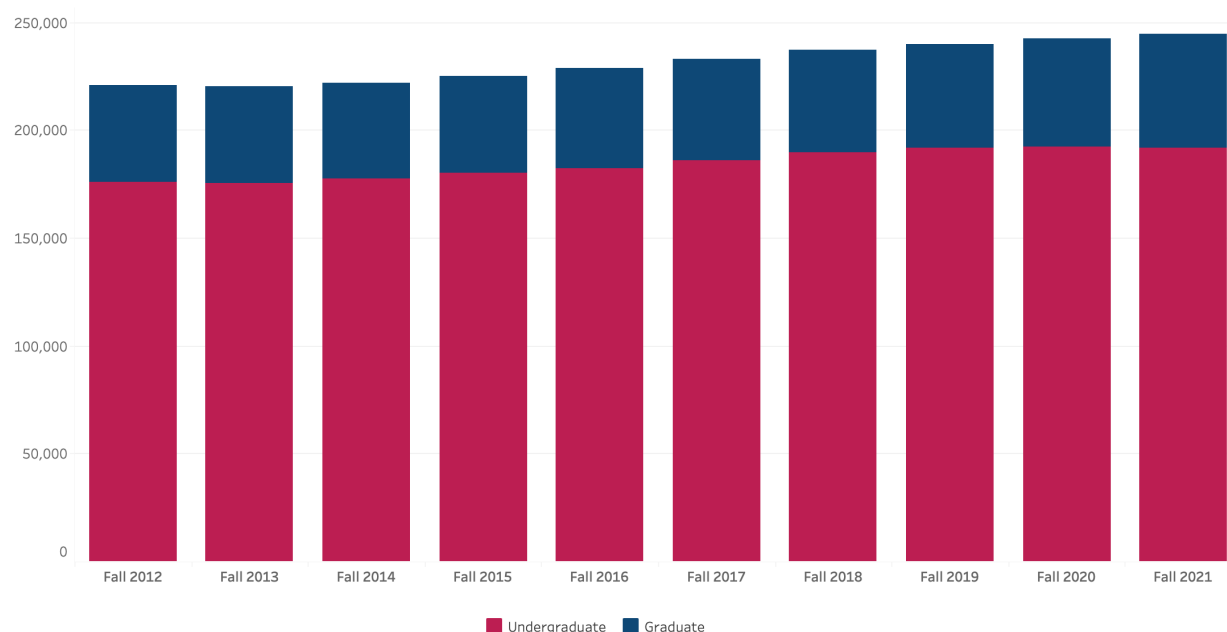


Table 1: UNC System Fall Headcount Enrollment, 2012—21

	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021
Undergraduate	175,760	175,328	177,744	180,376	182,465	185,880	189,890	191,632	192,170	191,518
Graduate	45,250	44,793	44,224	44,539	46,062	46,992	47,103	48,349	50,276	52,990
Total	221,010	220,121	221,968	224,915	228,527	232,872	236,993	239,981	242,446	244,508

¹ Inside Higher Ed, Not Coming, Not Staying: <https://www.insidehighered.com/news/2021/09/15/new-federal-data-confirm-enrollment-declines>

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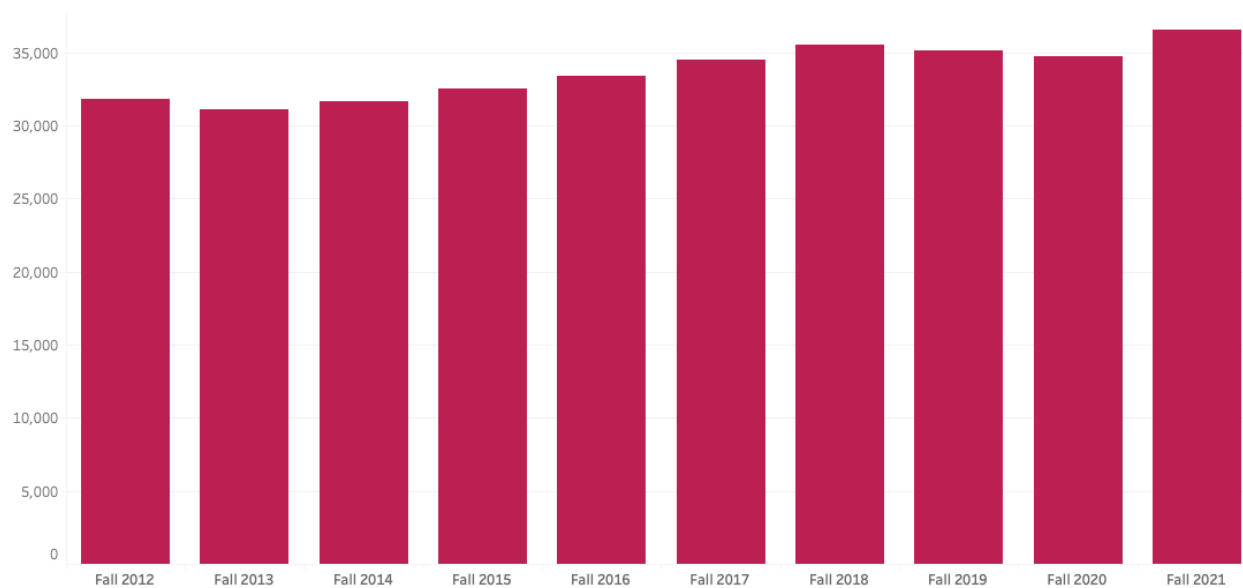
Table 2: UNC Institutions Total Fall Headcount Enrollment, 2012—21

	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021
ASU	17,589	17,838	18,026	17,932	18,295	18,811	19,108	19,280	20,023	20,641
ECU	26,947	26,887	27,511	28,289	28,962	29,131	28,718	28,651	28,798	28,021
ECSU	2,878	2,421	1,867	1,585	1,357	1,411	1,677	1,769	2,002	2,054
FSU	6,060	6,179	5,899	6,104	6,223	6,226	6,318	6,551	6,726	6,754
NCA&T	10,636	10,561	10,725	10,852	11,177	11,877	12,142	12,556	12,753	13,322
NCCU	8,604	8,093	7,687	8,011	8,094	8,097	8,207	8,011	8,078	7,953
NC State	34,340	34,009	33,989	34,015	33,755	34,432	35,479	36,304	36,042	36,831
UNCA	3,751	3,784	3,845	3,891	3,821	3,852	3,762	3,600	3,363	3,233
UNC-CH	29,278	29,127	29,135	29,084	29,468	29,911	30,011	29,877	30,092	31,641
UNCC	26,232	26,571	27,238	27,983	28,721	29,317	29,710	29,615	30,146	30,448
UNCG	18,516	18,074	18,647	19,393	19,647	19,922	20,106	20,196	19,764	19,038
UNCP	6,269	6,222	6,269	6,441	6,268	6,252	7,137	7,698	8,262	8,319
UNCW	13,733	13,937	14,570	14,918	15,740	16,487	16,747	17,499	17,915	18,031
UNCSA	880	912	958	970	1,043	1,014	1,042	1,086	1,070	1,119
WCU	9,608	10,107	10,382	10,340	10,805	11,034	11,639	12,167	12,243	11,877
WSSU	5,689	5,399	5,220	5,107	5,151	5,098	5,190	5,121	5,169	5,226
Total	221,010	220,121	221,968	224,915	228,527	232,872	236,993	239,981	242,446	244,508

Fall 2021 New Student Enrollment

In addition to tracking overall enrollment, analyzing new student enrollment levels can provide an early look at emerging trends. Three categories of new student enrollment are analyzed: new first-time freshmen, new undergraduate transfer, and new graduate students. While overall undergraduate enrollment declined from fall 2020 to fall 2021, new first-time freshmen student enrollment increased by roughly six percent year-to-year. This reversed two years of decline, and the total new first-time freshmen enrollment of 36,542 set a record.

Figure 2: UNC System New First-Time Freshmen Enrollment, Fall 2012-Fall 2021



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Table 3: UNC System New First-Time Freshmen Enrollment, Fall 2012-Fall 2021

Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021
31,849	31,086	31,668	32,525	33,420	34,522	35,537	35,133	34,700	36,542

In contrast to the positive turn in enrollment seen in first-time freshmen, new transfer student enrollment declined for the third consecutive year, and dropped to the lowest level since fall 2015. This mirrors trends in enrollment at the community college level in North Carolina and nationally. Additional information on transfer student enrollment and initiatives between the North Carolina Community College System (NCCCS) and the UNC System can be found in the annual [Review of the Comprehensive Articulation Agreement](#) report. This report was submitted to the Joint Legislative Education Oversight Committee, the Senate Appropriations Committee on Education/Higher Education, and the House Appropriations Subcommittee on Education by the NCCCS State Board and the UNC Board of Governors on November 1, 2021.

Figure 4: UNC System New Undergraduate Transfer Enrollment, Fall 2012-Fall 2021

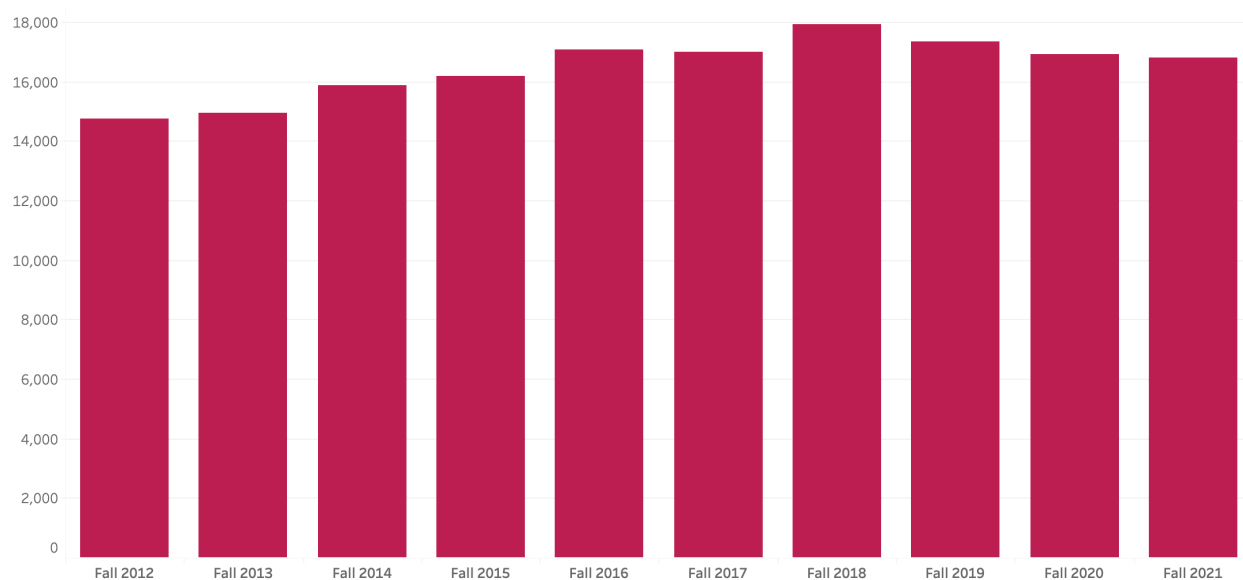


Table 5: UNC System New Undergraduate Transfer Enrollment, Fall 2012-Fall 2021

Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021
14,749	14,955	15,884	16,176	17,080	17,014	17,919	17,329	16,934	16,795

The area of strongest enrollment growth was new graduate students. Enrollment increased by roughly four and a half percent year-over-year at this level, which was the eighth consecutive year of growth. This mirrors national trends,² where graduate student enrollment has remained strong throughout the COVID-19 pandemic.

² Inside Higher Ed, U.S. Graduate Enrollments Grew in 2020:

<https://www.insidehighered.com/news/2021/10/18/graduate-enrollment-grew-2020-despite-pandemic>

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Figure 5: UNC System New Graduate Student Enrollment, Fall 2012-Fall 2021

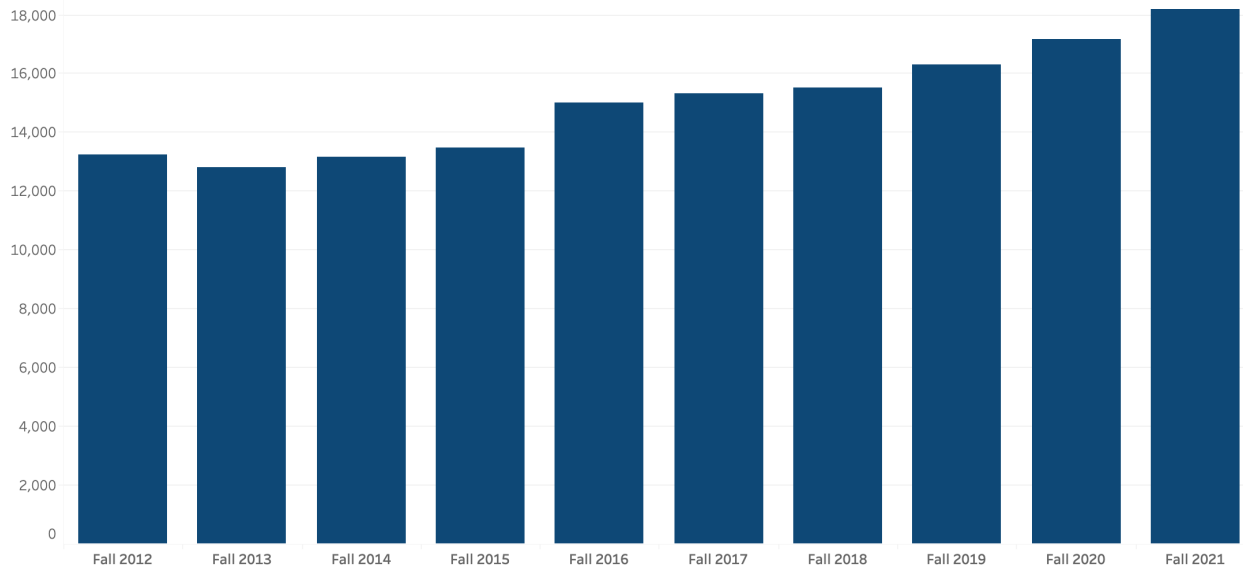


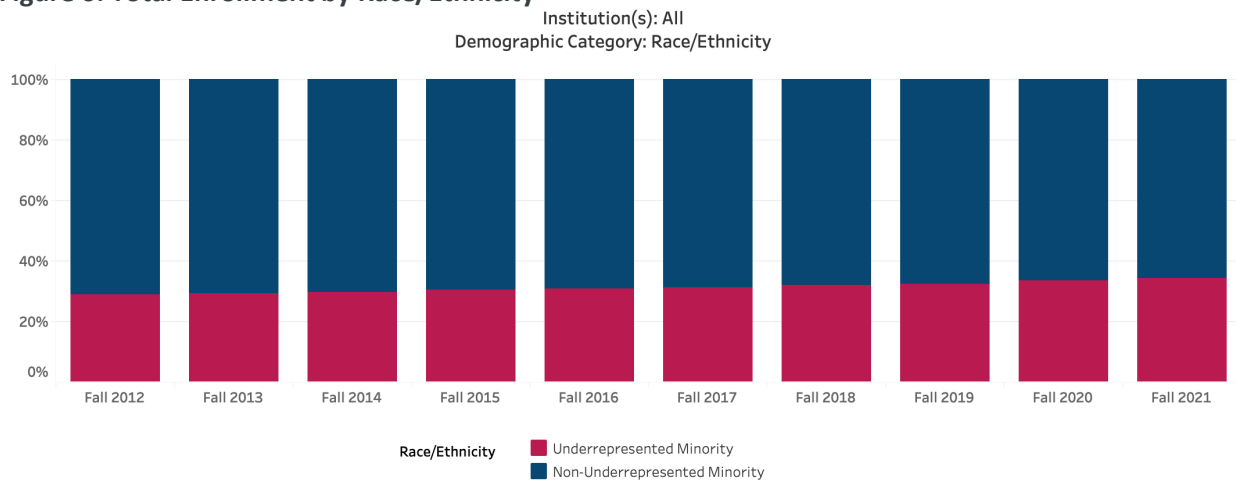
Table 6: UNC System New Graduate Student Enrollment, Fall 2012-Fall 2021

Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021
13,212	12,816	13,162	13,449	14,986	15,307	15,490	16,309	17,165	18,173

Enrollment by Race/Ethnicity

The UNC System has seen slow but consistent growth in the percentage of students enrolled from underrepresented minority groups. Between the fall of 2012 and the fall of 2021, the percent of students enrolled in the UNC System from an underrepresented minority group (American Indian or Alaska Native; Black or African American; Hispanic or Latino; or two or more races) increased from 28.7 percent to 34.2 percent. The largest increase was for individuals who identify as Hispanic or Latino, which increased from 4.4 percent to 8.3 percent during that time.

Figure 6: Total Enrollment by Race/Ethnicity



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Table 7: Total Student Enrollment by Race/Ethnicity

		Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021
Underrepresented Minority	American Indian or Alaska Native	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.8%
	Black or African American	21.1%	20.8%	20.5%	20.5%	20.3%	20.3%	20.3%	20.3%	20.6%	20.9%
	Hispanic or Latino	4.4%	4.7%	5.2%	5.6%	5.9%	6.3%	6.8%	7.3%	7.9%	8.3%
	Two or More Races	2.3%	2.7%	3.1%	3.3%	3.6%	3.8%	3.9%	4.0%	4.2%	4.2%
	Total	28.7%	29.1%	29.6%	30.4%	30.6%	31.3%	31.9%	32.5%	33.6%	34.2%
Non-Underrepresented Minority	Asian	3.4%	3.5%	3.7%	3.8%	4.0%	4.2%	4.4%	4.5%	4.7%	4.9%
	Native Hawaiian or Other Pacific Islander	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
	Nonresident Alien	3.7%	3.9%	4.2%	4.3%	4.3%	4.4%	4.3%	4.3%	3.5%	3.9%
	White	61.0%	60.6%	59.7%	58.6%	58.2%	57.1%	56.3%	55.8%	55.4%	54.5%
	Race/Ethnicity Unknown	3.1%	2.8%	2.7%	2.7%	2.8%	3.0%	3.1%	2.9%	2.7%	2.4%
	Total	71.3%	70.9%	70.4%	69.6%	69.4%	68.7%	68.1%	67.5%	66.4%	65.8%

First-Time Freshmen Student Residency

The UNC System saw significant enrollment demand from first-time freshmen from outside of North Carolina for the fall of 2021. Section 700.1.3 of the UNC Policy Manual, *Policy on Out-of-State Undergraduate Enrollment*, outlines caps set by the Board of Governors on the percent of non-resident students enrolled at each institution as first-time freshmen. For the five Historically Black Colleges and Universities (HBCU) in the UNC System, the cap for fall 2021 was 25 percent. For the other institutions the cap was 18 percent (University of North Carolina School of the Arts is exempted from the policy). For the fall of 2021, five institutions exceeded their specified cap on non-resident enrollment, as outlined in Table 8.

Table 8: New Freshmen Enrollment by Residency

	Fall 2019 Census				Fall 2020 Census				Fall 2021 Census			
	In-State		Out-of-State		In-State		Out-of-State		In-State		Out-of-State	
	N	%	N	%	N	%	N	%	N	%	N	%
ASU	3,218	91.9%	283	8.1%	3,629	92.9%	277	7.1%	3,661	89.3%	438	10.7%
ECU	3,830	87.8%	534	12.2%	3,611	87.2%	531	12.8%	3,526	86.0%	574	14.0%
ECSU	307	79.7%	78	20.3%	274	75.3%	90	24.7%	218	67.3%	106	32.7%
FSU	602	88.8%	76	11.2%	658	89.4%	78	10.6%	552	86.5%	86	13.5%
NCA&T	1,695	78.9%	453	21.1%	1,523	77.3%	448	22.7%	1,942	70.5%	811	29.5%
NCCU	806	78.5%	221	21.5%	889	72.2%	343	27.8%	855	75.7%	275	24.3%
NC State	4,242	87.1%	631	12.9%	4,135	87.1%	612	12.9%	4,293	85.1%	753	14.9%
UNCA	567	86.7%	87	13.3%	497	84.8%	89	15.2%	508	84.0%	97	16.0%
UNC-CH	3,439	82.2%	743	17.8%	3,717	83.6%	728	16.4%	3,745	79.9%	945	20.1%
UNCC	3,360	92.0%	293	8.0%	3,658	91.5%	341	8.5%	3,837	90.2%	419	9.8%
UNCG	2,604	94.8%	142	5.2%	2,295	94.4%	137	5.6%	2,379	93.6%	164	6.4%
UNCP	1,033	91.3%	98	8.7%	823	91.3%	78	8.7%	778	86.7%	119	13.3%
UNCW	2,022	86.3%	320	13.7%	1,738	85.8%	287	14.2%	1,994	81.9%	441	18.1%
UNCSA	113	48.3%	121	51.7%	100	45.7%	119	54.3%	99	47.6%	109	52.4%
WCU	1,782	84.6%	325	15.4%	1,513	83.0%	310	17.0%	1,416	81.9%	313	18.1%
WSSU	837	86.6%	130	13.4%	831	82.5%	176	17.5%	765	83.9%	147	16.1%
Total	30,457	87.0%	4,535	13.0%	29,891	86.6%	4,644	13.4%	30,568	84.1%	5,797	15.9%

UNC System Office Data & Analytics/enroll_039_out_of_state_cap_fall_2021/11OCT21
2021 policy change - HBCUs are allowed up to a 25% (up from 18%) out-of-state population.
This report uses RESIDENCY_CODE from the Career dataset.

Note: Prior to 2021, this report excluded in-state and out-of-state NCA&T engineering students. Comparing a post-2021 version of this report to a pre-2021 version will yield different numbers.

High School Student Enrollment

The UNC System has two constituent institutions with residential high school programs—the North Carolina School of Science and Mathematics (NCSSM) and the high school program at the University of North Carolina School of the Arts (UNCSA). Enrollment in these programs is largely stable and generally constrained by residence hall capacity. UNCSA high school enrollment is connected to their undergraduate and graduate programs. Their decrease in high school enrollment of 26 students is connected to their growth in undergraduate/graduate enrollment of 41 students. NCSSM is opening a

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second campus in Morganton in 2022, with an estimated initial enrollment of 300 residential students. That change will be reflected in next year's Fall Enrollment Report.

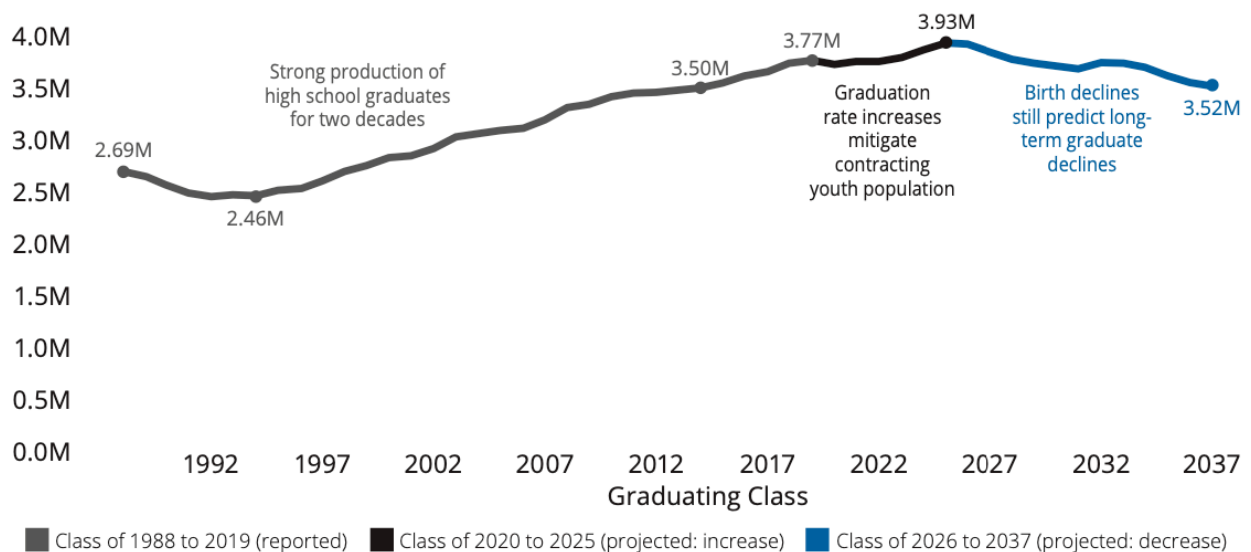
Table 9: Residential High School Enrollment

Institution	Fall 2020	Fall 2021
NCSSM	680	677
UNCSA	278	252
UNC System Total	958	929

Demographic Trends

Looking to the future, demographic shifts will continue to impact enrollment at UNC System institutions in a substantial way. The work of Dr. Nathan Grawe in exploring the impact of shifting demographic trends has attracted widespread recognition and attention.³ Data from the Western Interstate Commission for Higher Education's (WICHE) *Knocking at the College Door*⁴ report provides national and North Carolina specific data projections. At a national level, the total number of annual high school graduates has increased steadily and consistently from the mid-1990's through today and is projected to peak around roughly 2025. From 2025 to 2037 the total number of national high school graduates will decrease, with projections showing the 2037 levels to be similar to 2015.

Figure 7: Knocking at the Door, U.S. High School Graduate Projections



Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10th edition, 2020. See [Technical Appendix](#) for detailed sources of data through the Class of 2019; WICHE projections, Class of 2020 through 2037.

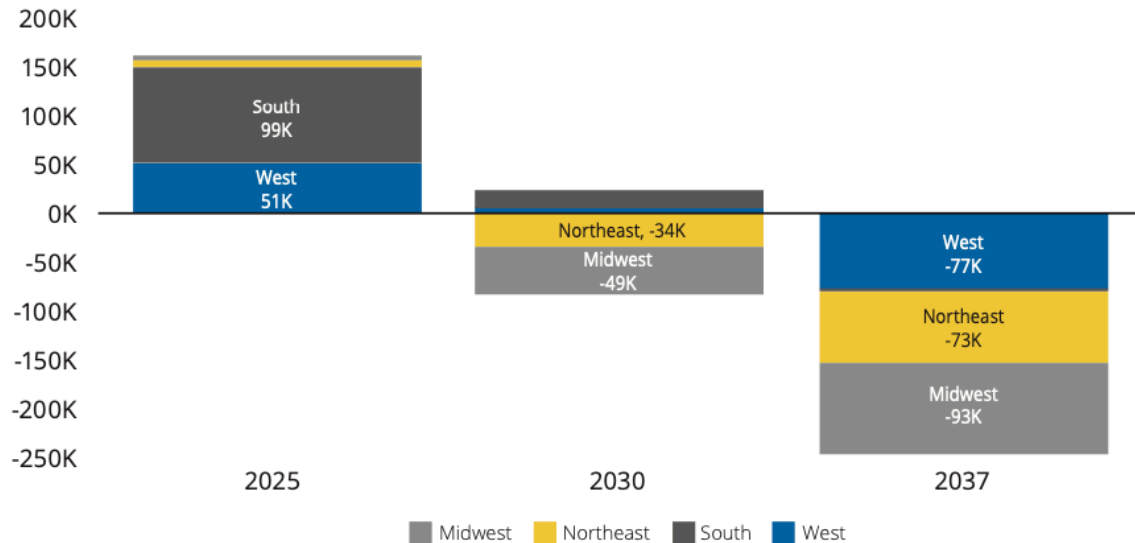
³ Inside Higher Ed, The Agile College: <https://www.insidehighered.com/admissions/article/2021/02/01/nathan-grawe-answers-questions-about-his-new-book-and-projected-demand>

⁴ *Knocking at the College Door*, 10th edition, 2020: <https://knocking.wiche.edu/wp-content/uploads/sites/10/2020/12/Knocking-pdf-for-website.pdf>

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The impact of these demographic shifts will not be felt equally across the states and regions of the country. WICHE projections are broken out at the regional level, showing that compared to 2019 data, there will be more high school graduates in 2025 in the Midwest, Northeast, South, and West. By 2030, only the South and West are producing more high school graduates than 2019, with the Northeast and Midwest down roughly 85,000 graduates compared to the previous decade. The trend accelerates by 2037, with the South roughly flat compared to 2019, but the West, Northeast, and Midwest down a projected 243,000 graduates.

Figure 8: Knocking at the Door, Regional High School Graduate Projections

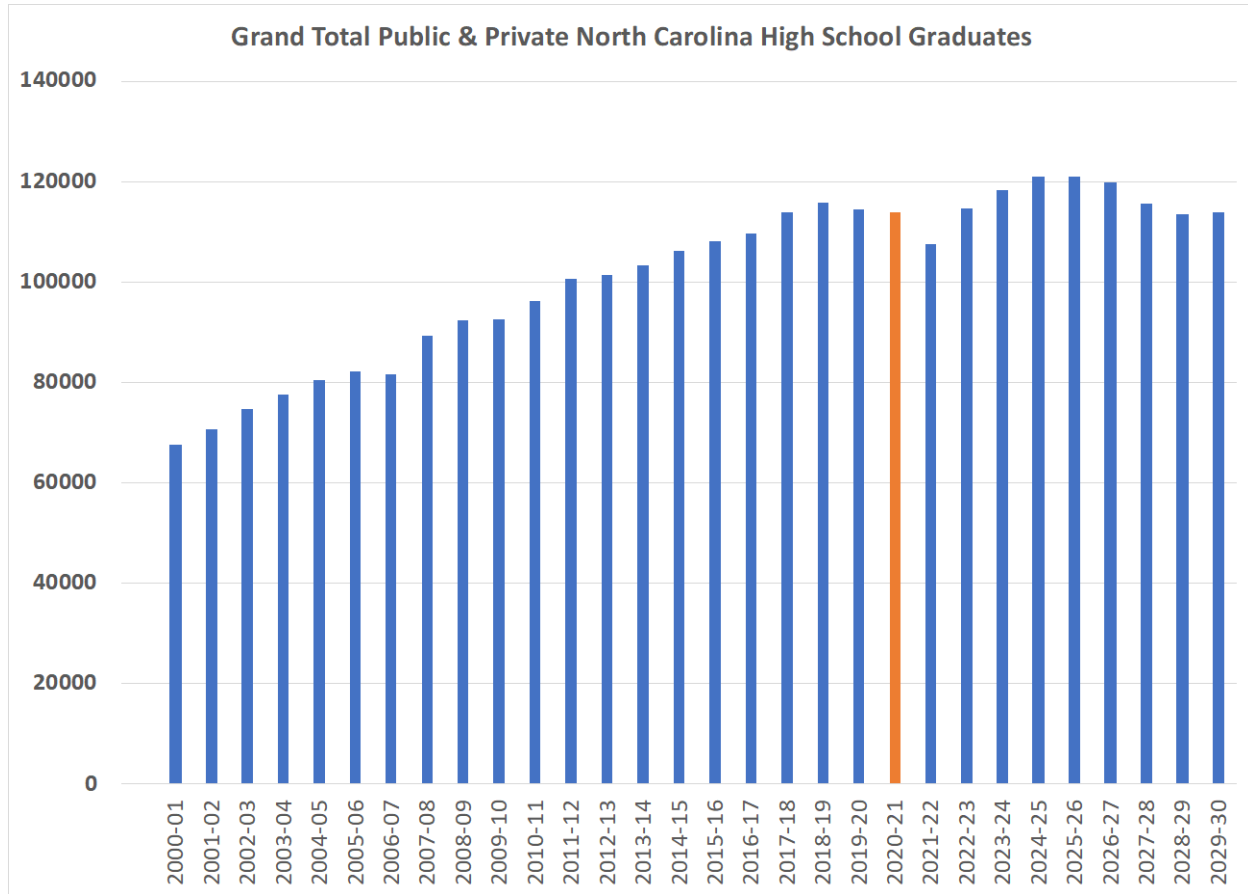


Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10th edition, 2020. WICHE projections and analysis.
Note: See Figure 2a for states included in each region.

North Carolina's projections from the WICHE data align broadly with the overall expectations for the South region. Total North Carolina High School graduates increased dramatically between 2001 (67,586) and 2019 (115,820), and roughly 114,000 students were expected to graduate from North Carolina high schools in 2021. Total high school graduates are then expected to dip sharply (-5.6 percent) for the class of 2022, rebound in 2023, and then grow until 2026, reaching a total of approximately 121,000 students per year. The total number of graduates will then start to decline, and stabilize around 114,000 students by 2029/2030, which is roughly equivalent to 2018 data.

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Figure 8: Knocking at the Door, North Carolina High School Graduate Projections

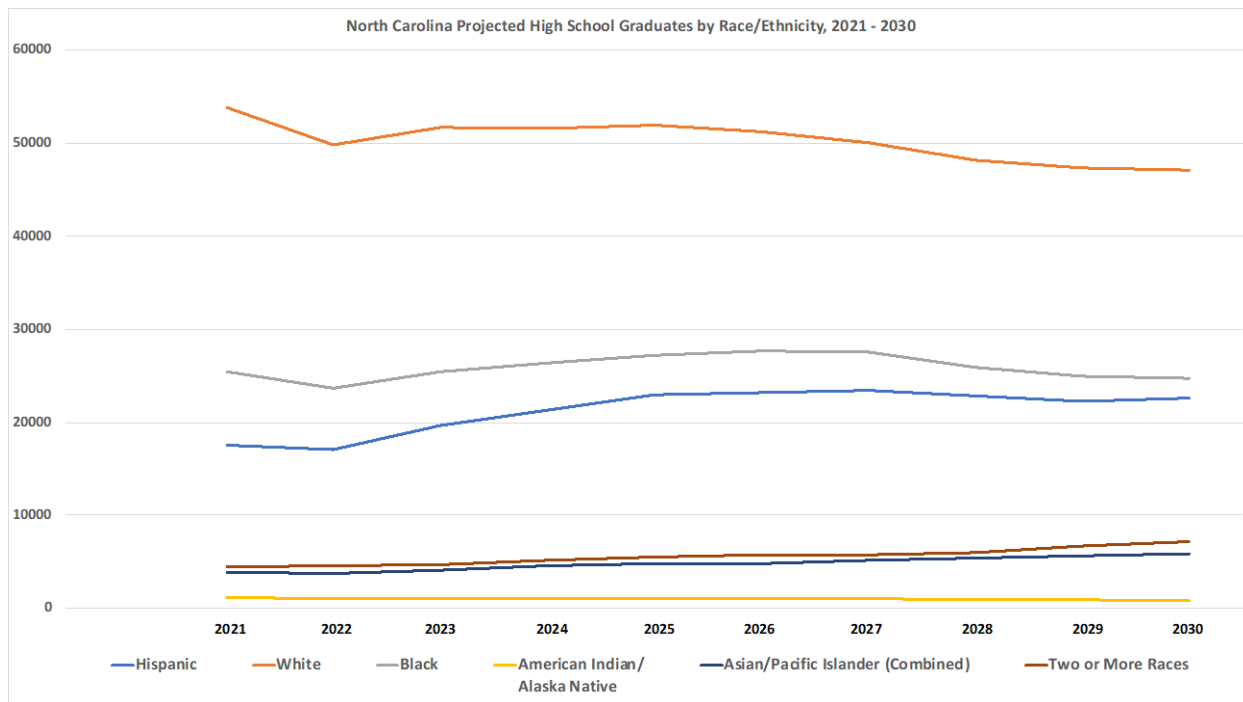


A closer examination of the North Carolina data shows that there is substantial variation in the projections across race/ethnicity. Between 2021 and 2030, students who identify as White or Black, which are the two largest categories of students, are expected to decline. White North Carolina graduates are expected to decline by nearly 7,000 students (-12.6 percent), and Black North Carolina graduates by nearly 1,000 (-2.7 percent). A decline of roughly 300 students (-26.3 percent) is also expected for students who identify as American Indian/Alaska Native.

Growth, however, is expected in students who identify as Hispanic (28.6 percent), Asian/Pacific Islander Combined (52.7 percent), and two or more races (58.6 percent). The total expected growth across those student categories is roughly equivalent to the total expected decline in White and Black student graduates over the next decade. So, while the total number of North Carolina high school graduates in 2029/2030 will look very similar to 2021, the mix of students will be very different.

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Figure 10: Knocking at the Door, North Carolina High School Graduate Projections by Race/Ethnicity



Conclusion

Enrollment in the UNC System maintained a strong and positive trajectory in the fall of 2021. While strong enrollment growth is important in any year, it is particularly notable this year given the strong headwinds caused by the impacts of COVID-19 and the attendant decreases seen in other states, systems, and institutions. Growth of new first-time freshmen and new graduate students helped to offset continued declines in new transfer student enrollment, and the overall diversity of students as measured by race/ethnicity in the UNC System increased every year between 2012 and 2021. While enrollment of North Carolina students increased slightly at the first-time freshmen level in 2021, demand from out-of-state students was unprecedented.

Moving forward, the impacts of COVID-19 will continue to be felt in the years to come. Additionally, North Carolina is expecting a substantial decrease in total high school graduates this year, which will put substantial pressure on institutions to maintain or meet their enrollment targets for the fall of 2022. In the coming decade substantial enrollment declines in the Northeast, Midwest, and West will cause colleges and universities in those regions to become more aggressive in recruiting students from the South, including North Carolina. Changing demographics in North Carolina will result in a decrease in White and Black students, the two largest categories of students enrolled in the UNC System. This will be offset by roughly equivalent increases in Hispanic, Asian/Pacific Islander, and students who identify as two or more races.

With all of these shifts, it will be important for the UNC System to have a focused and coordinated approach to enrollment and be proactive in identifying and serving students from historically underrepresented and non-traditional backgrounds, including returning students, adult learners, military affiliated students, and others.

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Report Authors:

Dr. David English, Vice President for Academic Affairs

Dr. Diane Marian, Vice President for Data and Analytics

Dr. Bethany Meighen, Vice President for Student Affairs