

ACADEMIC AFFAIRS COUNCIL

AGENDA ITEM: 4 – C

DATE: November 1, 2016

SUBJECT: Enrollment Trends in the University System

This report offers an in-depth analysis of university system fall enrollment data from 2007 to 2016. While annual fall enrollment reports already provide summary-level information about student enrollment in the Regental system, this report draws special attention to several key trends observed in system enrollment data in recent years. Findings suggest that enrollment transitions that currently are underway in the university system already have begun to reshape the basic composition of the Regental student body, and consequently may have a significantly impact on university programming and resource allocation.

RECOMMENDED ACTION

Information only.



*** Special Data Analysis ***

Enrollment Trends in the University System

System-wide fall enrollment totals have remained relatively stable over the last five years. This overall stability, however, has masked significant changes in the type and location of students that make up those totals. This report provides an in-depth look at those enrollments, showing how the system has undergone a series of crucial transitions. These transitions have significant implications from program delivery to system finance.

Analysis

Overall Enrollment

Headcount enrollment and full-time equivalent (FTE) enrollment are the university system's two primary measures of student enrollment.¹ Table 1 displays the university system's official headcount and FTE figures, as reported in SDBOR Fact Book publications, as well as unduplicated headcount. In general, all three enrollment measures appear to reflect considerable stability since 2010.²

Table 1
University System Enrollment

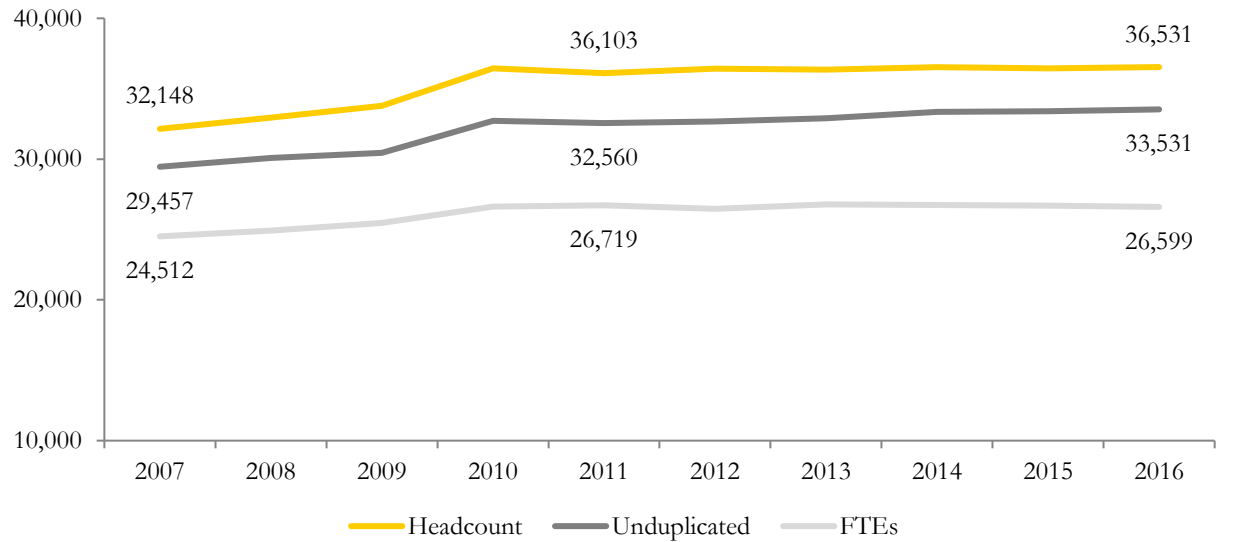
	Headcount	Unduplicated	FTEs
Fall 2007	32,148	29,457	24,512
Fall 2008	32,943	30,071	24,926
Fall 2009	33,779	30,449	25,468
Fall 2010	36,440	32,717	26,625
Fall 2011	36,103	32,560	26,719
Fall 2012	36,430	32,681	26,468
Fall 2013	36,365	32,892	26,782
Fall 2014	36,532	33,363	26,736
Fall 2015	36,439	33,390	26,684
Fall 2016	36,531	33,531	26,599
Δ Since 2010 (Percent)	+0.2	+3.7	-.1
Δ Since 2010 (Number)	+91	+814	-26

¹ All data for this analysis are sourced from census date enrollment extracts provided by Regents Information Systems.

² The year 2010 is used for comparison due to its position at the beginning of the university system's recessionary enrollment surge.

All three enrollment measures displayed in Table 1 and Figure 1 show a similar pattern of moderate escalation during the economic recession followed by a prolonged plateau from 2010 to 2016.³ But while it appears from these figures that system enrollments have been relatively stable since 2010, this apparent stability owes not to an actual pattern of “holding steady,” but to the counterbalanced, contrary trending of several large student subgroups.

Figure 1
University System Enrollment



Enrollment by University

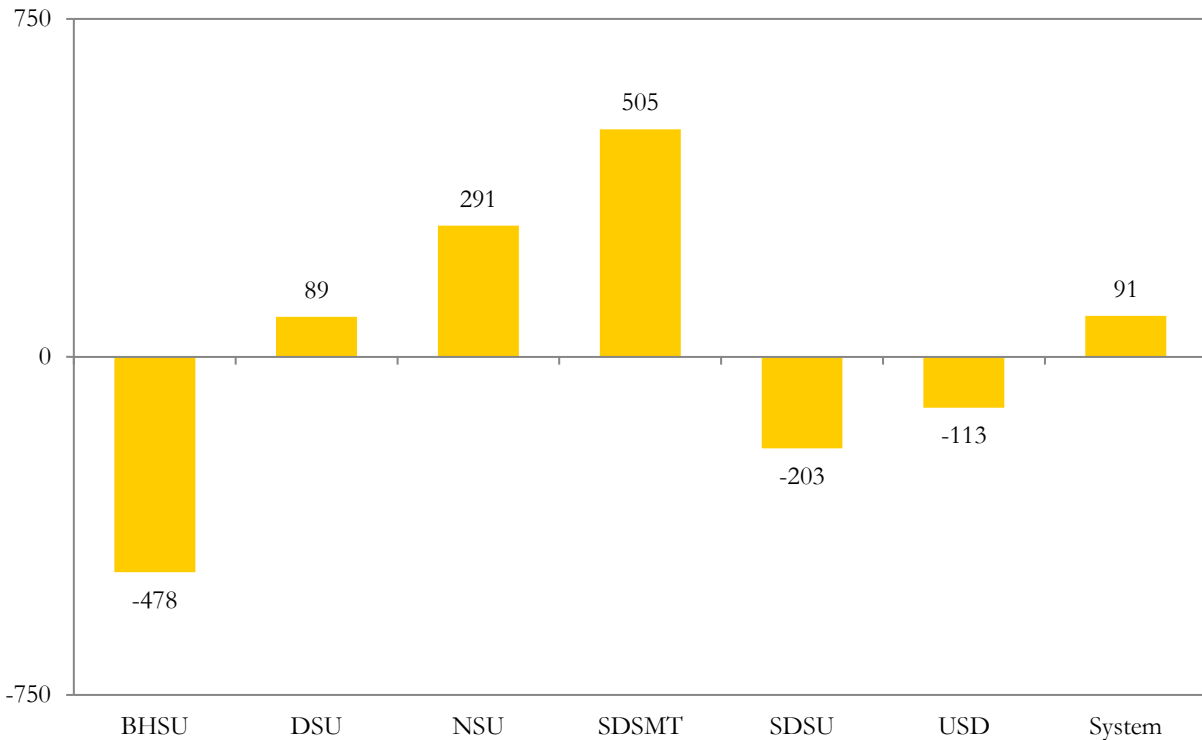
When system-wide totals are disaggregated by institution, significant differences in enrollment trends are evident. As shown in Table 2 (next page), enrollment patterns have indeed varied considerably by university in recent years. While DSU, NSU, and SDSMT have experienced net gains since 2010, BSHU, SDSU, and USD – the system’s three largest institutions – have lost enrollments over the same period. On the whole, however, system-level enrollments have remained virtually unchanged as a result of these offsetting institutional differences.

³ For the sake of readability, this report will focus mainly on headcount enrollment as a measure of student enrollment. Comparable full-time equivalent enrollment tables are presented in Appendix A.

Table 2
University Headcount

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	4,722	3,101	3,296	2,354	12,816	10,151	36,440
Fall 2011	4,415	3,102	3,580	2,311	12,725	9,970	36,103
Fall 2012	4,407	3,110	3,622	2,424	12,583	10,284	36,430
Fall 2013	4,464	3,129	3,343	2,640	12,554	10,235	36,365
Fall 2014	4,489	3,047	3,580	2,798	12,557	10,061	36,532
Fall 2015	4,395	3,145	3,496	2,843	12,589	9,971	36,439
Fall 2016	4,244	3,190	3,587	2,859	12,613	10,038	36,531
Δ Since 2010 (Percent)	-10.1	+2.9	+8.8	+21.5	-1.6	-1.1	+0.2
Δ Since 2010 (Number)	-478	+89	+291	+505	-203	-113	+91

Figure 2
Change in University Headcount, 2010-2016



These data illustrate one way in which system-level totals have appeared to remain stable despite considerable institutional fluctuation. The sections below will address several other forms of offsetting enrollments in the university system, some of which may rightly prompt deeper reflection about university system's broader enrollment trajectory.

Enrollment by Location

Another dimension of enrollment change shows the way students now avail themselves of university system offerings. Table 3 displays the same headcount figures shown in Table 2, but after disaggregation by enrollment type. In this approach, headcount enrollments are split into two separate categories: (1) on-campus at a given university, and (2) off-campus at a given university.⁴ The “on-campus” category includes all students taking at least one face-to-face course at a given main campus; the “off-campus” category includes all other enrolled students. With respect to growth since 2010, differences between these two categories are immediately evident.

Table 3a
University Headcount, On-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,673	1,267	2,014	2,320	10,137	6,112	24,523
Fall 2011	2,547	1,261	2,015	2,284	9,999	6,029	24,135
Fall 2012	2,445	1,277	1,894	2,365	9,777	6,116	23,874
Fall 2013	2,398	1,272	1,907	2,586	9,864	6,118	24,145
Fall 2014	2,206	1,241	1,719	2,738	9,896	6,111	23,911
Fall 2015	2,152	1,261	1,615	2,758	9,817	6,179	23,782
Fall 2016	2,073	1,303	1,557	2,745	9,836	6,148	23,662
Δ Since 2010 (Percent)	-22.4	+2.8	-22.7	+18.3	-3.0	+1.1	-3.5
Δ Since 2010 (Number)	-600	+36	-457	+425	-301	+36	-861

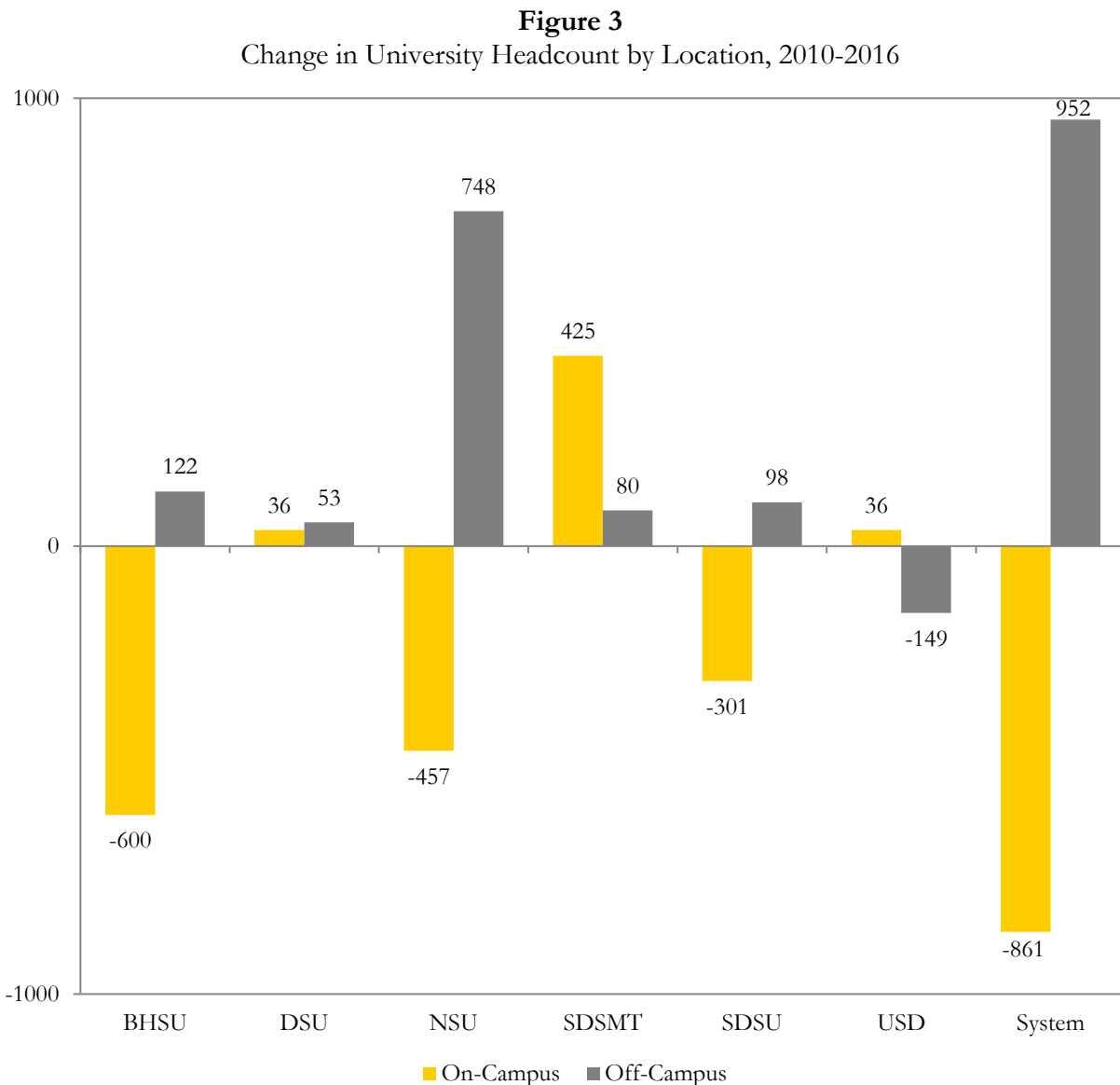
Table 3b
University Headcount, Off-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,049	1,834	1,282	34	2,679	4,039	11,917
Fall 2011	1,868	1,841	1,565	27	2,726	3,941	11,968
Fall 2012	1,962	1,833	1,728	59	2,806	4,168	12,556
Fall 2013	2,066	1,857	1,436	54	2,690	4,117	12,220
Fall 2014	2,283	1,806	1,861	60	2,661	3,950	12,621
Fall 2015	2,243	1,884	1,881	85	2,772	3,792	12,657
Fall 2016	2,171	1,887	2,030	114	2,777	3,890	12,869
Δ Since 2010 (Percent)	+6.0	+2.9	+58.3	+235.3	+3.7	-3.7	+8.0
Δ Since 2010 (Number)	+122	+53	+748	+80	+98	-149	+952

⁴ These categories are mutually exclusive and cumulative; added together, they sum to the same headcount figures presented in SDBOR Fact Book publications. Students are assigned to levels in ascending hierarchical fashion, meaning that a student taking courses both on-campus and off-campus will be counted as an on-campus student.

These figures underscore a growing gap between on-campus and off-campus enrollments in the university system, particularly at certain universities. Since 2010, the university system has sustained a net 3.0 percent loss in on-campus headcount while at the same time experiencing an offsetting 6.2 percent gain in off-campus headcount. Overall, these data indicate – aside from SDSMT – a slow but steady decline in on-campus students in the public university system. At BHSU and NSU in particular, on-campus headcount enrollments have fallen nearly 20 percent since 2010. Indeed, as of Fall 2015, three universities enroll more off-campus students than on-campus students.

Figure 3 provides a visual representation of the numeric changes presented above. It is clear from these data that – despite maintaining roughly unchanged totals – system-level enrollment totals have shifted appreciably toward off-campus offerings. Compounded over time, these changes will profoundly transform the operational demands of the public universities.



Enrollment by Residency

Stemming in part from state budgetary constraints, a declining pool of high school graduates, new institutional and non-institutional competitors, and an improving economy, postsecondary institutions of all kinds currently face unprecedented pressure to explore and cultivate new student markets. These enrollment pressures have – in South Dakota and elsewhere – resulted in a new emphasis on recruiting students from other states. Consequently, university system enrollment counts have begun to reflect the ever-increasing presence of out-of-state students enrolling the state’s public universities.

In 2010, there were roughly 26,000 South Dakota residents and 11,000 non-residents enrolled in the university system (see Table 4). By 2016, the resident figure had fallen by 10.5 percent to roughly 23,000 while the non-resident figure had risen by 26.5 percent to about 13,000. In total, it appears that the university system has shed more than 2,700 South Dakota residents since 2010, a loss of over ten percent. This shift has been especially prominent at particular universities. Figure 4 (next page) shows these data graphically, and reinforces the pronounced expansion of out-of-state students in the university system.

Table 4a
University Headcount, Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	3,742	2,429	2,425	1,374	8,537	7,333	25,840
Fall 2011	3,455	2,361	2,500	1,301	8,297	6,823	24,737
Fall 2012	3,405	2,317	2,706	1,282	7,923	6,884	24,517
Fall 2013	3,434	2,277	2,510	1,325	7,613	6,701	23,860
Fall 2014	3,404	2,128	2,786	1,384	7,449	6,609	23,760
Fall 2015	3,317	2,121	2,664	1,378	7,404	6,447	23,331
Fall 2016	3,190	2,107	2,767	1,353	7,141	6,562	23,120
Δ Since 2010 (Percent)	-14.8	-13.3	+14.1	-1.5	-16.4	-10.5	-10.5
Δ Since 2010 (Number)	-552	-322	+342	-21	-1,396	-771	-2,720

Table 4b
University Headcount, Non-Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	980	672	871	980	4,279	2,818	10,600
Fall 2011	960	741	1,080	1,010	4,428	3,147	11,366
Fall 2012	1,002	793	916	1,142	4,660	3,400	11,913
Fall 2013	1,030	852	833	1,315	4,941	3,534	12,505
Fall 2014	1,085	919	794	1,414	5,108	3,452	12,772
Fall 2015	1,078	1,024	832	1,465	5,185	3,524	13,108
Fall 2016	1,054	1,083	820	1,506	5,472	3,476	13,411
Δ Since 2010 (Percent)	+7.6	+61.5	-5.9	+53.7	+27.9	+23.3	+26.5
Δ Since 2010 (Number)	+74	+411	-51	+526	+1,193	+658	+2,811

Figure 4
Change in University Headcount by Residency, 2010-2016

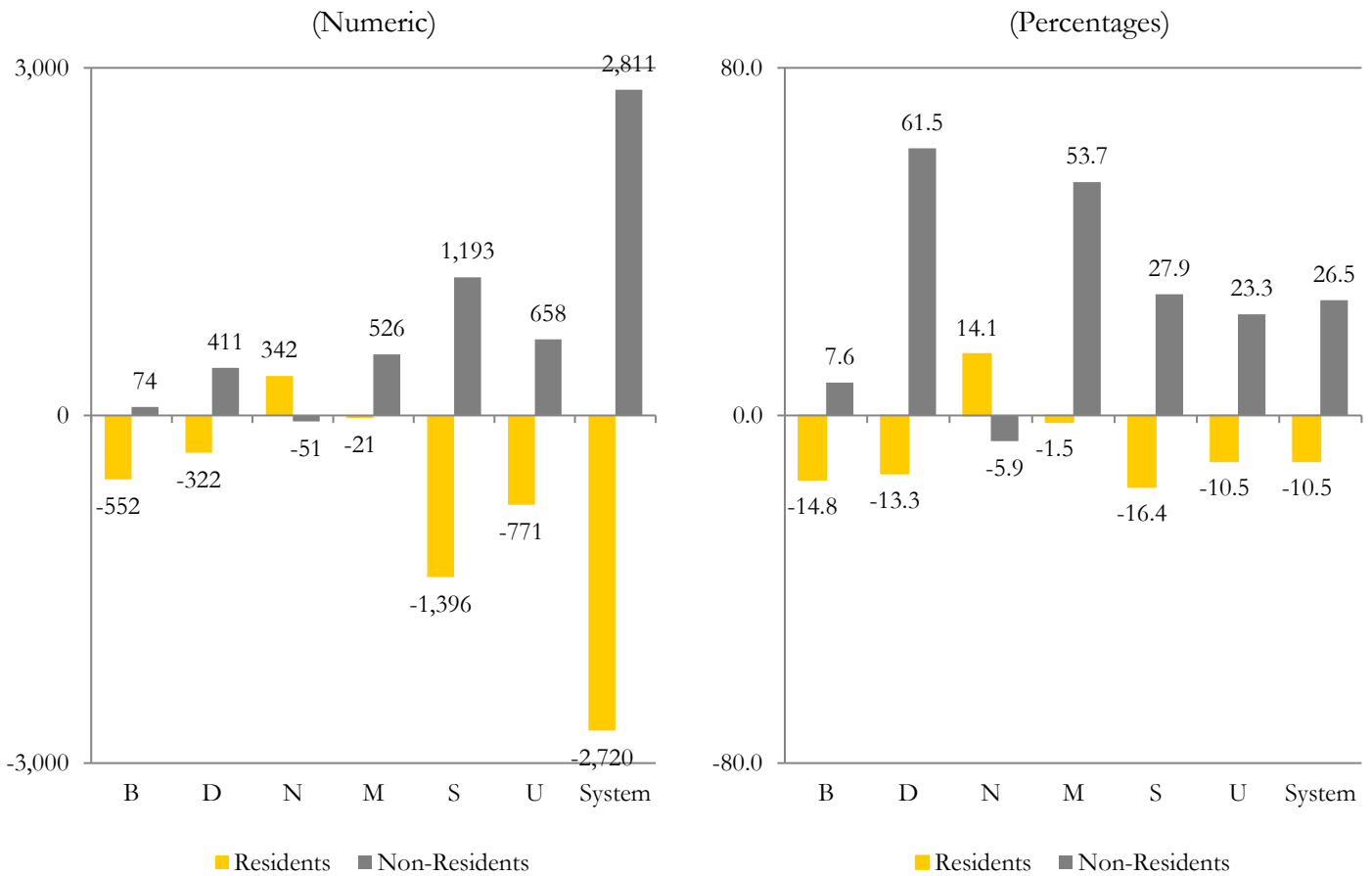


Table 5 shows a comparative summary of these two factors (location and residency) for 2010 and 2016. This cross-tabulation indicates that virtually all of the South Dakota residents lost since 2010 have been students taking at least one on-campus course. Despite this cavernous segmentation of the student population, system totals have remained essentially unmoved.

Table 5
University System Headcount by Location and Residency, 2010-2016

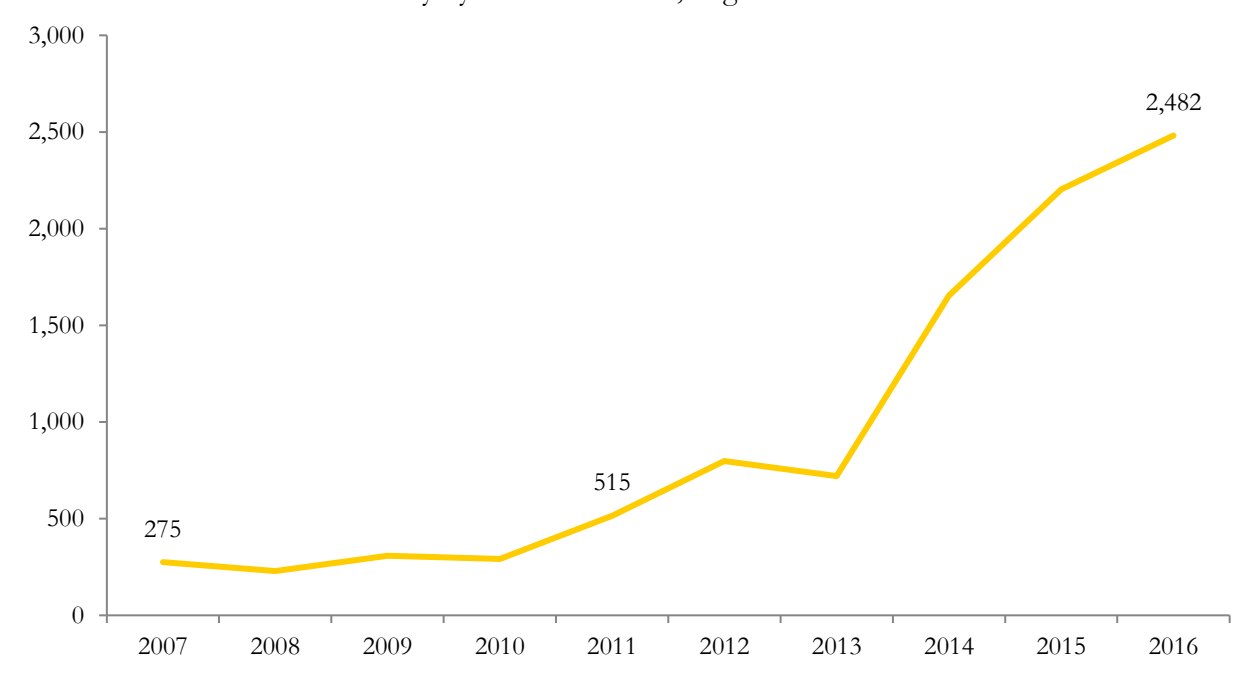
	2010	2016	Gain (n)	Gain (p)
Residents, On-Campus	15,972	13,131	-2,841	-17.8
Residents, Off-Campus	9,868	9,989	121	+1.2
Non-Residents, On-Campus	8,551	10,531	+1,980	+23.2
Non-Residents, Off-Campus	2,049	2,880	+831	+40.6
Total	36,440	36,531	+91	+0.2

Enrollments by High School Students

A final transition occurring in university enrollments relates to high school students. Whether through concurrent enrollment, dual credit enrollment, or by other means, high school students in South Dakota may enroll in credit-bearing university courses at any Regental university. Fueled mainly by new legislative funding for dual credit offerings beginning in 2014, the university system has experienced a meteoric rise in enrollments by high school students.

Figure 5 illustrates university system enrollments by high school students over the course of the last decade. Since 2010 alone, high school enrollments in the university system have grown by over 750 percent, a net gain of nearly 2,200 students.

Figure 5
University System Headcount, High School Students



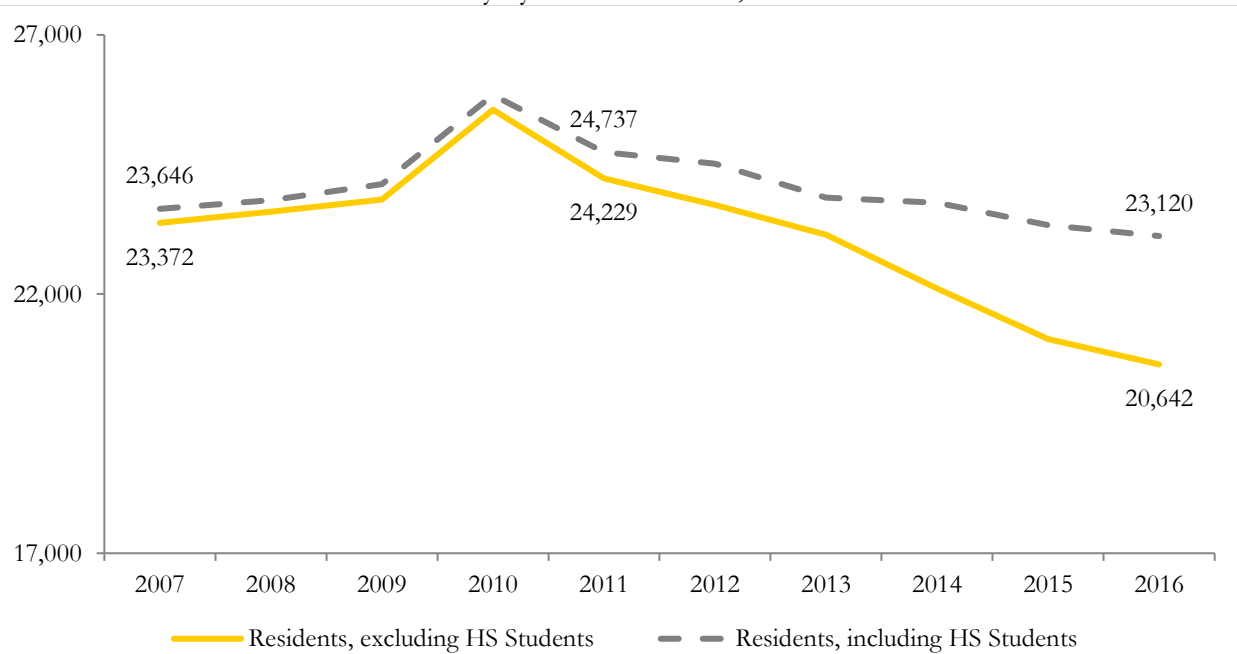
This rise in high school student enrollments has sustained university system headcounts that otherwise would have fallen significantly since 2010. Table 6 displays headcount trends for high school students, non-high school students, and all students. While high school enrollments rose by 752.9 percent over this period, all other enrollments fell by 5.8 percent. Again, in spite of this crucial shift, overall enrollment counts show essentially no change.

Table 6
University System Headcount, High School Students

	High School Students	All Other Students	Total Students
Fall 2010	291	36,149	36,440
Fall 2011	515	35,588	36,103
Fall 2012	798	35,632	36,430
Fall 2013	721	35,644	36,365
Fall 2014	1,653	34,879	36,532
Fall 2015	2,204	34,235	36,439
Fall 2016	2,482	34,049	36,531
Δ Since 2010 (Percent)	+752.9	-5.8	+0.2
Δ Since 2010 (Number)	+2,191	-2,100	+91

One final graphic shows the combined effect of this rise in high school enrollments and the aforementioned decline in South Dakota resident enrollments. More specifically, Figure 6 displays historical trends for resident enrollments after excluding high school students. These data indicate that – sans high school students – university system resident headcounts have fallen by over 4,900 students in the last six years alone, a drop of 19.2 percent, or over 800 students per year. These trends imply a dramatic reconstitution of the Regental student body, and have clear implications for the university system’s capacity to affect macro-level change in the South Dakota labor force.

Figure 6
University System Headcount, Residents



Appendix A Supplementary FTE Tables

The above report focuses on headcount enrollment – which measures enrollment *coverage* – as its primary measure of interest. However, full-time equivalent enrollment – which measures enrollment *intensity* – is another important indicator of student participation in the university system. Accordingly, each table presented in the main report (except Table 1) is reproduced below with full-time equivalent enrollment data.

Table A1
University System Enrollment

(Not shown; same as main report)

Table A2
University FTE

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	3,241	1,708	2,097	1,997	10,512	7,069	26,625
Fall 2011	3,135	1,746	2,202	1,982	10,421	7,234	26,719
Fall 2012	3,036	1,728	2,157	2,070	10,153	7,325	26,468
Fall 2013	3,062	1,741	2,128	2,235	10,220	7,396	26,782
Fall 2014	2,920	1,740	2,144	2,391	10,180	7,362	26,736
Fall 2015	2,882	1,859	1,995	2,405	10,141	7,401	26,684
Fall 2016	2,825	1,897	1,953	2,394	10,130	7,400	26,599
Δ Since 2010 (Percent)	-12.8	+11.1	-6.9	+19.9	-3.6	+4.7	-.09
Δ Since 2010 (Number)	-416	+189	-144	+397	-382	+331	-26

Table A3a
University FTE, On-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,241	1,076	1,693	1,953	8,937	5,345	21,245
Fall 2011	2,101	1,037	1,733	1,945	8,641	5,331	20,787
Fall 2012	1,946	1,043	1,607	2,016	8,246	5,279	20,137
Fall 2013	1,893	1,017	1,583	2,183	8,275	5,277	20,229
Fall 2014	1,680	992	1,451	2,327	8,298	5,268	20,015
Fall 2015	1,643	994	1,358	2,329	8,110	5,312	19,746
Fall 2016	1,626	1,035	1,287	2,305	8,089	5,143	19,485
Δ Since 2010 (Percent)	-27.4	-3.8	-24.0	+18.0	-9.5	-3.8	-8.3
Δ Since 2010 (Number)	-615	-41	-406	+352	-848	-202	-1,760

Table A3b
University FTE, Off-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	1,000	632	404	44	1,576	1,725	5,380
Fall 2011	1,033	710	469	38	1,780	1,903	5,933
Fall 2012	1,090	685	550	55	1,907	2,046	6,332
Fall 2013	1,169	724	545	51	1,945	2,119	6,553
Fall 2014	1,240	748	693	64	1,882	2,095	6,721
Fall 2015	1,240	864	637	76	2,032	2,089	6,938
Fall 2016	1,199	861	666	89	2,040	2,257	7,112
Δ Since 2010 (Percent)	+19.9	+36.2	+64.9	+102.3	+29.4	+30.8	+32.2
Δ Since 2010 (Number)	+199	+229	+262	+45	+464	+532	+1,732

Table A4a
University FTE, Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,477	1,295	1,425	1,104	6,809	4,870	17,980
Fall 2011	2,399	1,278	1,487	1,062	6,624	4,788	17,639
Fall 2012	2,266	1,227	1,470	1,045	6,155	4,716	16,879
Fall 2013	2,266	1,206	1,468	1,071	6,012	4,732	16,754
Fall 2014	2,114	1,159	1,505	1,135	5,835	4,706	16,455
Fall 2015	2,069	1,207	1,356	1,107	5,747	4,657	16,143
Fall 2016	2,010	1,223	1,354	1,083	5,488	4,700	15,859
Δ Since 2010 (Percent)	-18.9	-5.6	-5.0	-1.9	-19.4	-3.5	-11.8
Δ Since 2010 (Number)	-467	-72	-71	-21	-1,321	-170	-2,121

Table A4b
University FTE, Non-Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	765	413	672	892	3,704	2,199	8,645
Fall 2011	736	468	715	920	3,797	2,445	9,081
Fall 2012	770	500	686	1,025	3,998	2,609	9,589
Fall 2013	796	535	661	1,164	4,209	2,664	10,028
Fall 2014	806	580	639	1,256	4,345	2,656	10,282
Fall 2015	814	652	639	1,298	4,394	2,744	10,541
Fall 2016	815	674	600	1,311	4,642	2,700	10,741
Δ Since 2010 (Percent)	+6.5	+63.2	-10.7	+47.0	+25.3	+22.8	+24.2
Δ Since 2010 (Number)	+50	+261	-72	+419	+938	+501	+2,096

Table A5

University System FTE by Location and Residency, 2010-2016

	2010	2016	Gain (n)	Gain (p)
Residents, On-Campus	13,708	10,760	-2,948	-21.5
Residents, Off-Campus	4,272	5,097	+825	+19.3
Non-Residents, On-Campus	7,537	8,725	+1,188	+15.8
Non-Residents, Off-Campus	1,108	2,015	+907	+81.9
Total	26,625	26,599	-26	-0.09

Table A6

University System FTE, High School Students

	High School Students	All Other Students	Total Students
Fall 2010	75	26,550	26,625
Fall 2011	140	26,579	26,719
Fall 2012	223	26,245	26,468
Fall 2013	207	26,575	26,782
Fall 2014	447	26,289	26,736
Fall 2015	595	26,089	26,684
Fall 2016	695	25,904	26,599
Δ Since 2010 (Percent)	+826.7	-2.4	-0.09
Δ Since 2010 (Number)	+620	-646	-66