Enrollment Trend Analysis

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Strategic Planning

Georgia Gwinnett College

Submitted by:

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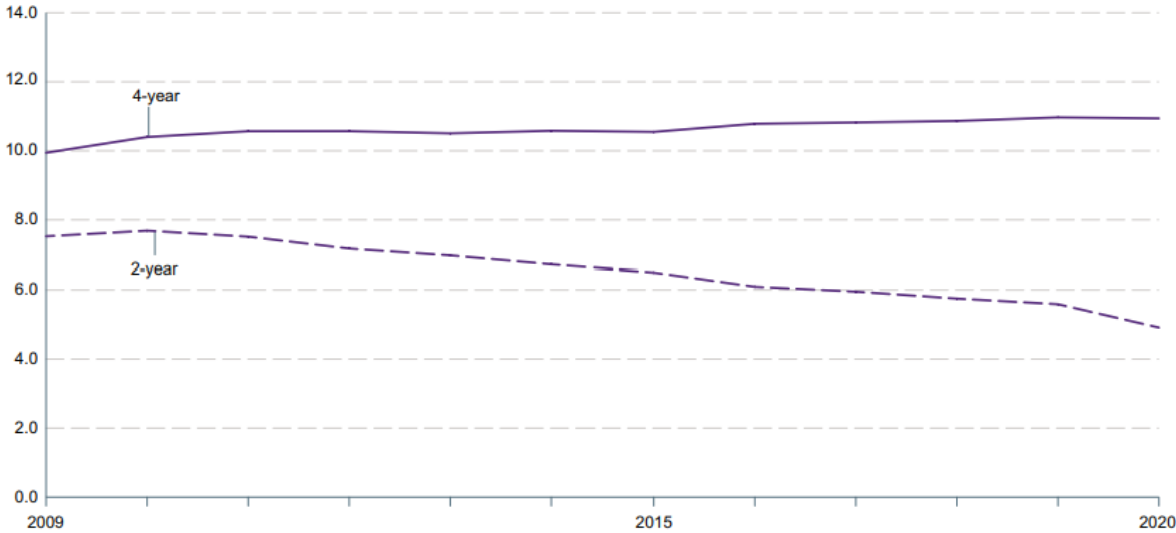
1. Background and Overview

Georgia Gwinnett College (GGC) hired MGT to conduct a comprehensive market assessment and enrollment trend analysis research study. The objective of the initiative is to provide Georgia Gwinnett College with the opportunity to grow enrollment and enhance GGC's reputation. This Enrollment Trend Analysis provides the historical enrollments and projected enrollments for Georgia Gwinnett College as well as the national context for higher education enrollment.

The national yield rate for colleges and universities is 39% overall and nearly 62% for public two- to four-year institutions. Between 2009 and 2020, national enrollments in undergraduate education declined by 9%, from 17.5 million to 15.9 million. Full-time enrollment decreased by 11% and part-time decreased by 6%. Two-year institutions experienced the greatest decline in enrollments, 35%, from 7.5 to 4.9 million. By the spring of 2022, public two-year institutions saw a sharp drop of 7.8% from the prior year as college attendance continued to decline.

Exhibit 1. Undergraduate Enrollment in Degree-granting Postsecondary Institutions, by Level of Institution, 2009-2020.

Source: Irwin, V., De La Rosa, J., Wang, K., Hein, S., Zhang, J., Burr, R., Roberts, A., Barmer, A., Bullock Mann, F., Dilig, R., and Parker, S. (2022). Report on the Condition of Education 2022 (NCES 2022-144). U.S. Department of Education. Washington, DC: National Center for Education Statistics. Retrieved from https://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2022144.

These declines are occurring at a time when unemployment is low, employers are struggling to find candidates, and society is questioning the return on investment of a college degree.

2. Methodology

MGT reviewed data gathered as part of the environmental scan and provided by Georgia Gwinnett College to frame and serve as a foundation for exploring enrollment scenarios. MGT collected data from various sources including Lightcast, which aggregates data from multiple sources. MGT also interviewed key staff to provide insight and perspective on current factors positively and negatively impacting enrollment. These discussions centered on recruitment of prospective students, enrollment of students, and issues concerning retention and persistence for the institution.

MGT used three models to create the enrollment scenarios for GGC. All three perform best when population growth is relatively consistent. To mitigate spikes in either direction as impacted by the changing local population or factors such as COVID, models account for fluctuations.

Average Enrollment Growth Model

The Average Enrollment Growth Model calculates future enrollment growth based on the historical average growth from year to year. This simple model multiplies the historical average percentage increase or decrease by the prior year's enrollment to project future enrollment estimates. For example, if enrollment in the first years decreased 5% from 2010 to 2011 and decreased 7% from 2011 to 2012, then the average percentage change would be a 6% decrease, and 6% would be the factor used to project future enrollment in this model.

Linear Regression Model

The Linear Regression Model uses a statistical approach to estimate an unknown future value of a variable by performing calculations on known historical values. Once calculated, values for different future dates can then be plotted to provide a "regression line" or "trend line." MGT uses a "straight-line" model to estimate future enrollment values, a model that finds the "best fit" based on historical data.

Population Projection Models

The population projection model uses age-related population data as its base. In this case, using historical population data from the 15 to 29 age group and those 29 and over as well as the historical enrollment data, MGT created a student generation factor or capture rate for each of the last ten years, from both the local Gwinnett County population and the surrounding counties. To provide greater precision, historical enrollments by age cohorts were factored into this model. This capture rate was then applied to expected population increases or decreases to project future enrollment.
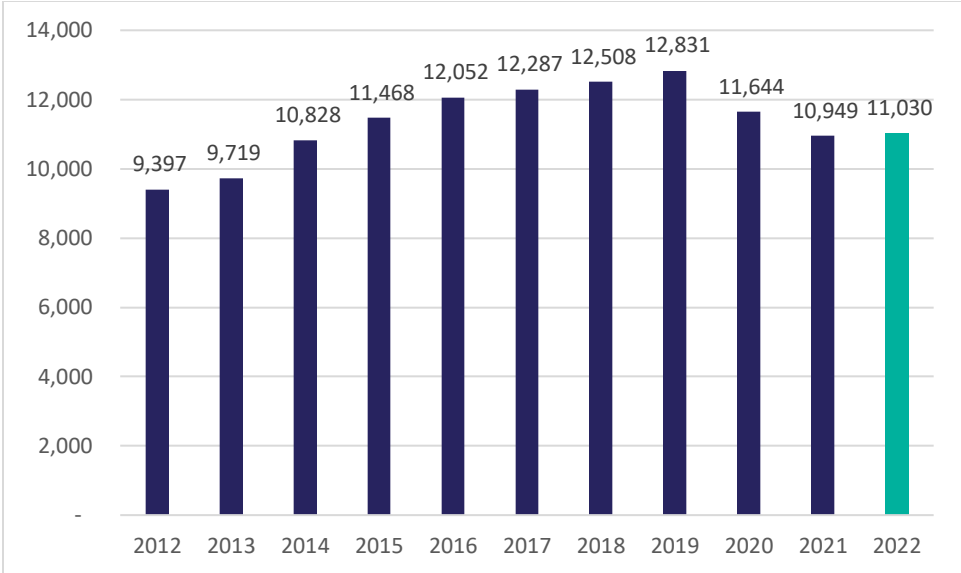
MGT Weighted Enrollment Model

To estimate enrollment projections over ten years, MGT weighted the three models which creates a single estimate and accounts for prior implemented strategies along with future strategies.
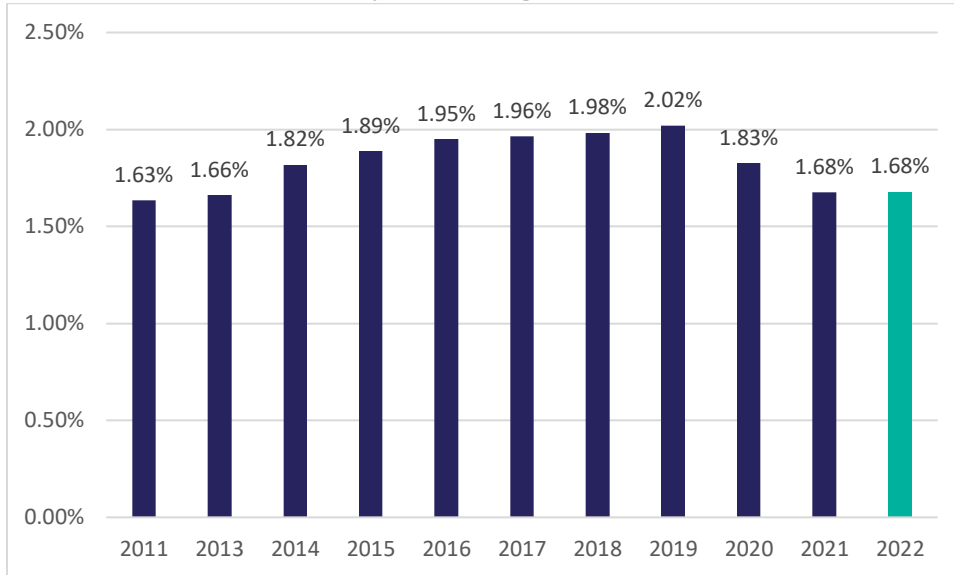
3. Enrollment Analysis

MGT examined a variety of factors pertaining to GGC's enrollment and historical enrollments from 2012 to 2022, a period in which the school experienced a growth of 17.4%, or 1,633 students. The enrollment climbed every year from 2012 to 2019, declining in 2020 and again in 2021, when enrollment significantly declined by 14.7% or 1,882 students over two years. Enrollment increased by 0.7% from 2021 to 2022 attributable to an increase of 81 students. Given that enrollments have been steadily increasing over the past ten years, and that the population of Gwinnett County is expected to rise overall, this increase could signal a return to the original growth patterns prior to COVID.
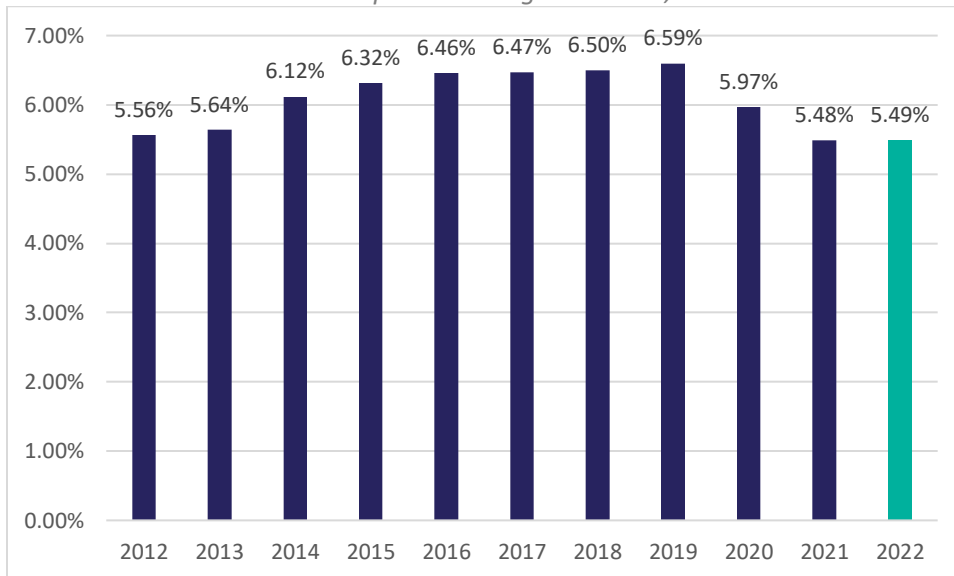
Exhibit 2. GGC Historical Enrollment, 2012 to 2022

The percentage of the local population aged 15-64 who enrolled at GGC is represented by the capture rate. The capture rate increased from 2012 to 2022; however, from 2019 to 2021, the overall decline in the capture rate was only 0.34%. The initial capture rate for 2021 to 2022 based on fall 2022 enrollments is 1.68%.

Exhibit 3. Percent Capture Rate ages 15 to 64, 2011 to 2022.

The capture rate in the 15-29 age cohort decreased from 2012 to 2022; nonetheless, the overall reduction from 2019 to 2021 was 1.11%. The initial capture rate for 2022 based on fall 2022 enrollments is 0.01% higher than the prior year.

Exhibit 4. Percent Capture Rate ages 15 to 29, 2011 to 2022.

Graduation, Transfer Out, and Retention

Graduation, transfer out, and retention are key indicators of continued success. National Center for Education Statistics (NCES) defines graduation, transfer out, and retention in the following ways:
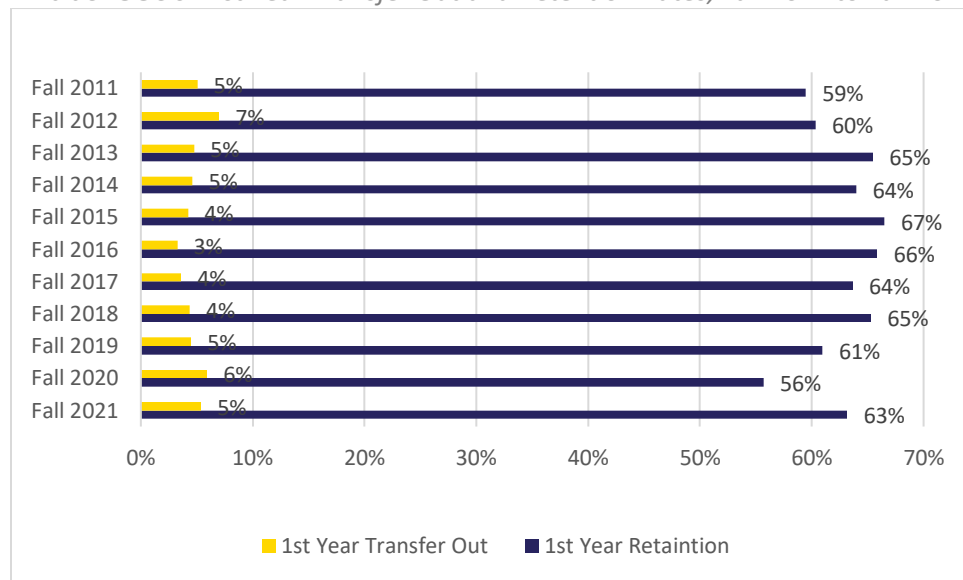
Graduation Rate: the calculated percentages of students who graduate or complete their program within a specified timeframe (4 to 6 years).

Transfer Out Rate: Percentage of students who leave an institution without completing their program of study and subsequently enrolled in another institution.

Retention Rate: The percentage of students who started out in the respective programs and returned to the college, regardless of the program they enrolled in, or graduated by the following fall. [1]

GGC's transfer rate for first time first year students (full and part time) has varied between 3% and 6%, with an average of 5%, from fall 2011 through 2021. The lowest rate was recorded in the fall of 2016 at 3%. The rate reached its highest in fall 2012 and 2020, at 7% and 6%, respectively. During the same time frame, the average retention rate was roughly 63%. The highest retention rate was in the fall of 2015, at 67%. The lowest retention rate, 56%, was recorded in fall 2020, likely caused, in large part, by the pandemic.
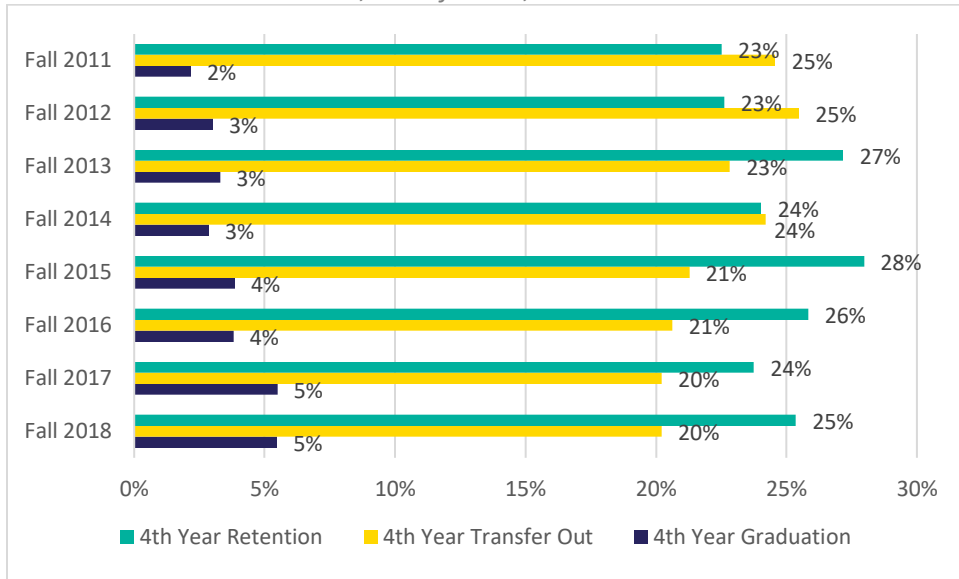
Exhibit 5. GGC's First Year Transfer Out and Retention Rates, Fall 2011 to Fall 2021.

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[1] Condition of Education - Undergraduate Retention and Graduation Rates, 2019

The average 4th year retention rate (those returning after their 3rd year of education with the same institution) from fall 2011 to fall 2018, for full and part time students, was around 25%. The fall of 2015 saw the greatest retention rate at 28%. The transfer rate for fourth years ranged from 20% to 25%, with an average of 22%. Fall 2011 and 2012 saw the lowest retention percentage, 23%. The fall of 2017 and 2018 saw the lowest rate, which was 20%. In the fall of 2011 and 2012, the rate peaked at 25%. The average percentage of graduation from the fourth year was 4%, ranging from 2% to 5%. Since fall 2011, the graduation rate has been rising by about 1% every couple of years, demonstrating a positive trend toward improved graduation results.

Exhibit 6. GGC's Fourth Year Retention, Transfer Out, and Graduation Rates Fall 2011 to Fall 2021.

4. Enrollment Modeling

MGT developed enrollment projection models for Georgia Gwinnett College based on the historical enrollments through 2022. The capture data is based on the historical enrollments through 2021 along with U.S. Census data about the population from 2012 to 2022, and projected population from 2023 to 2032.

GGC Enrollment Model

The different models indicate varied enrollment projections overall as noted in **Exhibit 7.** The initial MGT weighted model, given GGC's past performance and the current environment, projected an enrollment decrease of 225 students over the next ten years from a projected enrollment of 10,798 to 10,573 students by 2032. The calculations differ for 2022 due to the various statistical methods used to project enrollment. Average Enrollment Growth and Linear Regression calculations are functions of past enrollment performance. The average model indicates a decline of 973 enrollees over the next 10 years. The linear model indicates an increase of 1,701 students by 2032, the second largest modeled increase despite the decreasing enrollments since 2019. Population growth is a function of changes in the projected populations of Gwinnett County and Georgia.

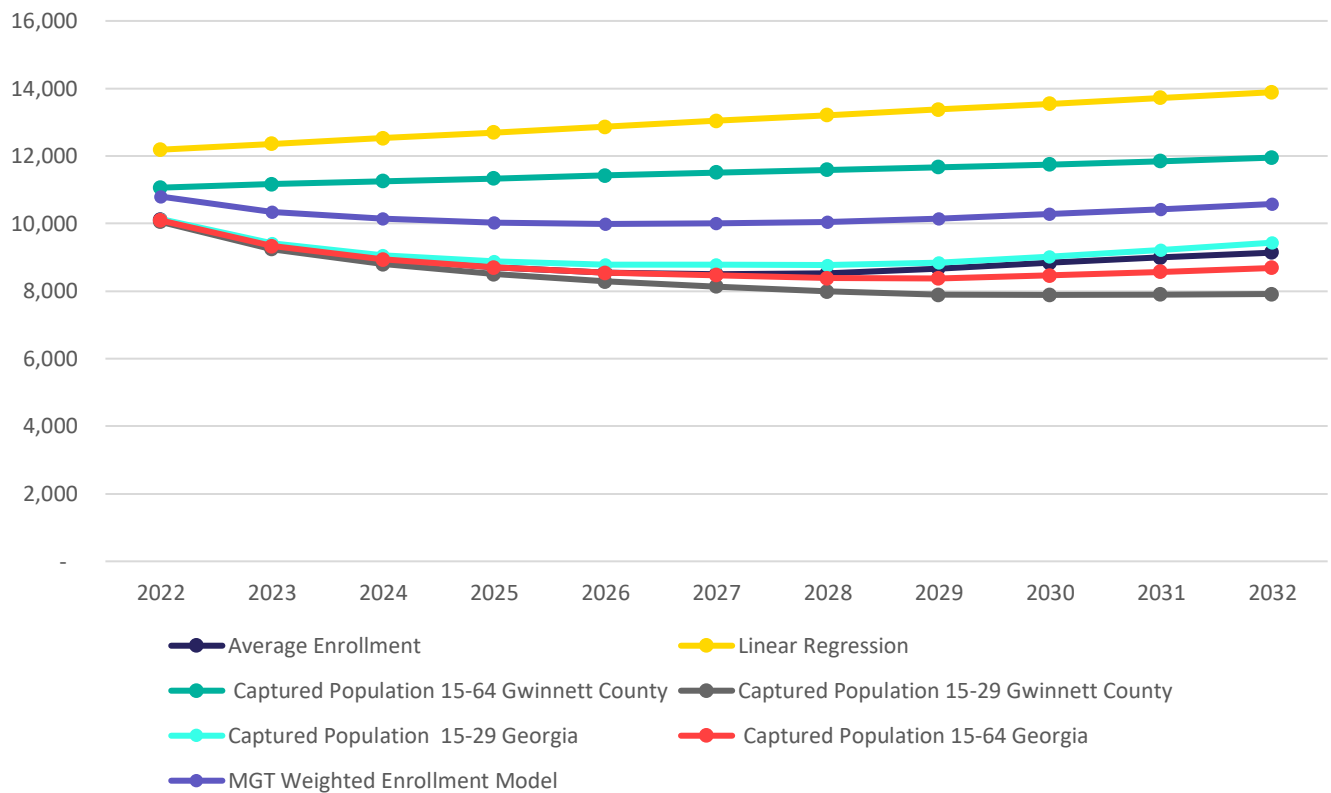*Exhibit 7. Georgia Gwinnett College Enrollment Projections, 2022-2032.*

Exhibit 8. Georgia Gwinnett College Initial Projected Enrollment, 2022-2032.

	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Average Enrollment	10,116	9,346	8,952	8,710	8,555	8,501	8,526	8,671	8,834	9,000	9,143
Linear Regression	12,188	12,358	12,529	12,699	12,869	13,039	13,209	13,379	13,549	13,719	13,890
Captured Population 15-29 Gwinnett County	10,048	9,239	8,798	8,507	8,289	8,142	7,985	7,891	7,889	7,898	7,914
Captured Population 15-64 Gwinnett County	11,064	11,163	11,255	11,340	11,427	11,510	11,588	11,668	11,752	11,847	11,953
Captured Population 15-29 Georgia	10,133	9,417	9,063	8,878	8,787	8,781	8,774	8,839	9,016	9,221	9,430
Captured Population 15-64 Georgia	10,091	9,330	8,933	8,696	8,543	8,468	8,387	8,374	8,463	8,573	8,687
MGT Weighted Enrollment Model	10,798	10,345	10,138	10,035	9,989	10,002	10,041	10,141	10,282	10,431	10,573

Source: MGT.

5. Economic Influencers

An analysis of the data collected during the Environmental Scan highlighted external and internal factors that will influence enrollment at Georgia Gwinnett College. The evolving demographics and economic shifts are indicative of the pressures, both beneficial and challenging, that GGC will face for future enrollments.

Evolving Demographics and Economic Shifts

GGC welcomed 168 international students and 215 out of state students in the fall of 2022. Florida, the state with the most students enrolling in GGC, included 22 new students. A significant portion of the out-of-state students came from New York (13 students) and California (10 students). Since 2012, there have been a total of 2,021 students from out of state who attended GGC.

Currently, Gwinnett County, Georgia, and the surrounding states (Alabama, Florida, Georgia, North Carolina, South Carolina, and Tennessee) populations are shifting and students in these states may be interested in enrolling in GGC given their proximity and programmatic offerings. The population in Gwinnett County is expected to grow by 7%, Georgia is projected to increase by 8%, and surrounding states populations are also anticipated to grow between 3% (Alabama) to 11% (South Carolina). Populations within all age cohorts between 15 to 54 are expected to grow 3% in Florida and South Carolina. The remaining states expect a decrease in the ranges of 0% to 2%. While there is variation in the population projections, these shifts in the population could have a positive impact on GGC's enrollment.

Educational attainment, the percentage of people between the ages of 25 and 65 by degree earned, contributes to a positive outlook for increasing enrollments for adult students at GGC. In Gwinnett County, approximately 39.4% of adults have earned a high school diploma or some college and an additional 9.5% have earned an associate degree as the highest educational credential. This population may be a target audience for returning to college to earn a bachelor's degree to build knowledge, abilities, skills, and experiences as required in the workforce.

A review of local jobs reveals that there are slightly more jobs requiring a bachelor's degree than citizens with bachelor's degrees. Employers are shifting from degree requirements to seek and further train occupation specific skills. Further, 11,550 people are currently unemployed in the county. This information discloses potential opportunities for GGC to boost the talented workforce and potentially connect adult students with employers through their education and into career pathways.

6. Industry Needs

The top growth industries that drive the economy in the Gwinnett County are health care and social assistance; construction; and professional, scientific, and technical services. These growth industries provide insight into majors and partnerships for GGC that may also build enrollment growth.

Due to the aging of the population and developments in medical technology, the health care sector has undergone tremendous change in recent years. Employers are consequently searching for employees with advanced technology skills and training in healthcare administration, medical terminology, and healthcare informatics. According to job posts in the county, the industry has a significant demand for workers with a high school diploma or GED (27% of unique job postings), a bachelor's degree (16% of unique job postings), as well as those with specialized certificates and licenses, including registered nurses and medical technicians. Additionally, employers in the sector place a great importance on strong managerial abilities, excellent communication skills, and exemplary customer service.

The construction industry is characterized by a high demand for skilled workers, especially in areas such as warehousing, accounting, and marketing. Employers are looking for people with a combination of technical abilities and education in construction management and sales as the need for new construction and renovation projects continues to climb. According to job postings in the county, the industry has a large need for workers with a high school diploma or GED (31% of unique job postings), a bachelor's degree (18% of unique job postings), as well as individuals with certifications and expertise in safety management and building codes, reading and interpreting blueprints, and a strong understanding of construction materials and processes.

Engineering, consulting, and management services are just a few of the many sectors that make up the professional, scientific, and technical services industry. As a result, there is a considerable demand within the market for employees with advanced technical training and education. The county's job listings indicate that the industry has a significant need for individuals with a high school diploma or GED (26% of unique job postings), a bachelor's degree (30% of unique job postings), as well as those with certifications and experience in particular fields or specialties. Success in the field also requires strong communication and teamwork skills, as well as solid problem-solving and critical thinking abilities. Furthermore, it is highly desired to have knowledge of emerging technologies and their applications within the industry.[2]

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[2] *Lightcast Analyst*, 2022