



**UNIVERSITY SYSTEM  
OF GEORGIA**

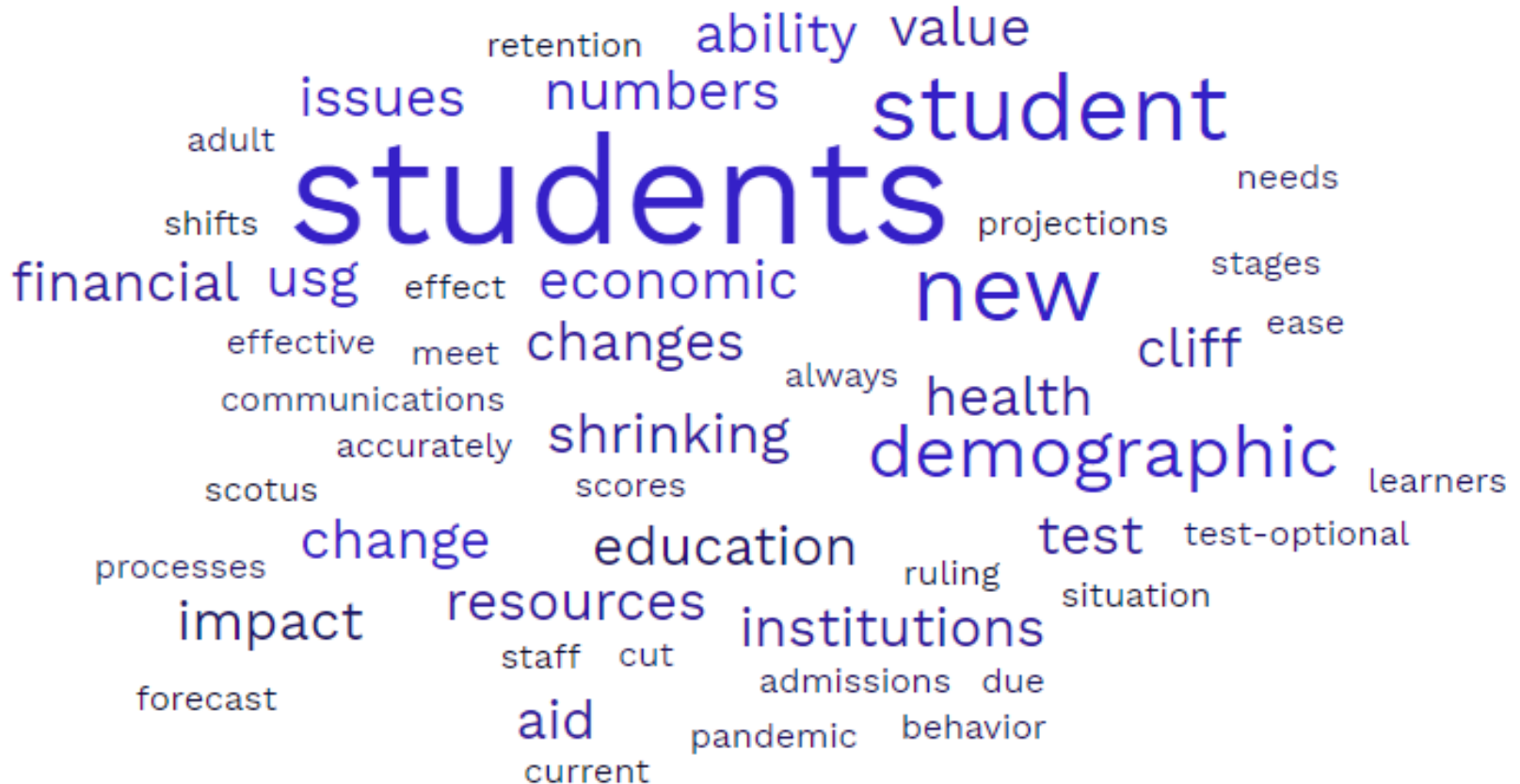
# Enrollment Management in the Current Landscape

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*Vice President, Consulting, Student Success*

March 23, 2023

# What (probably) kept you up last night...



# Today's Focus

- Changing Demographics: National, Regional, Georgia
- What is top of mind for prospective and current students?
- What role do families play?
- Current insights: College planning, student perceptions, and marketing
- Discussion



# The Current Landscape: Demographics

# Today's College Students

## *Demographics, Trends and Challenges*

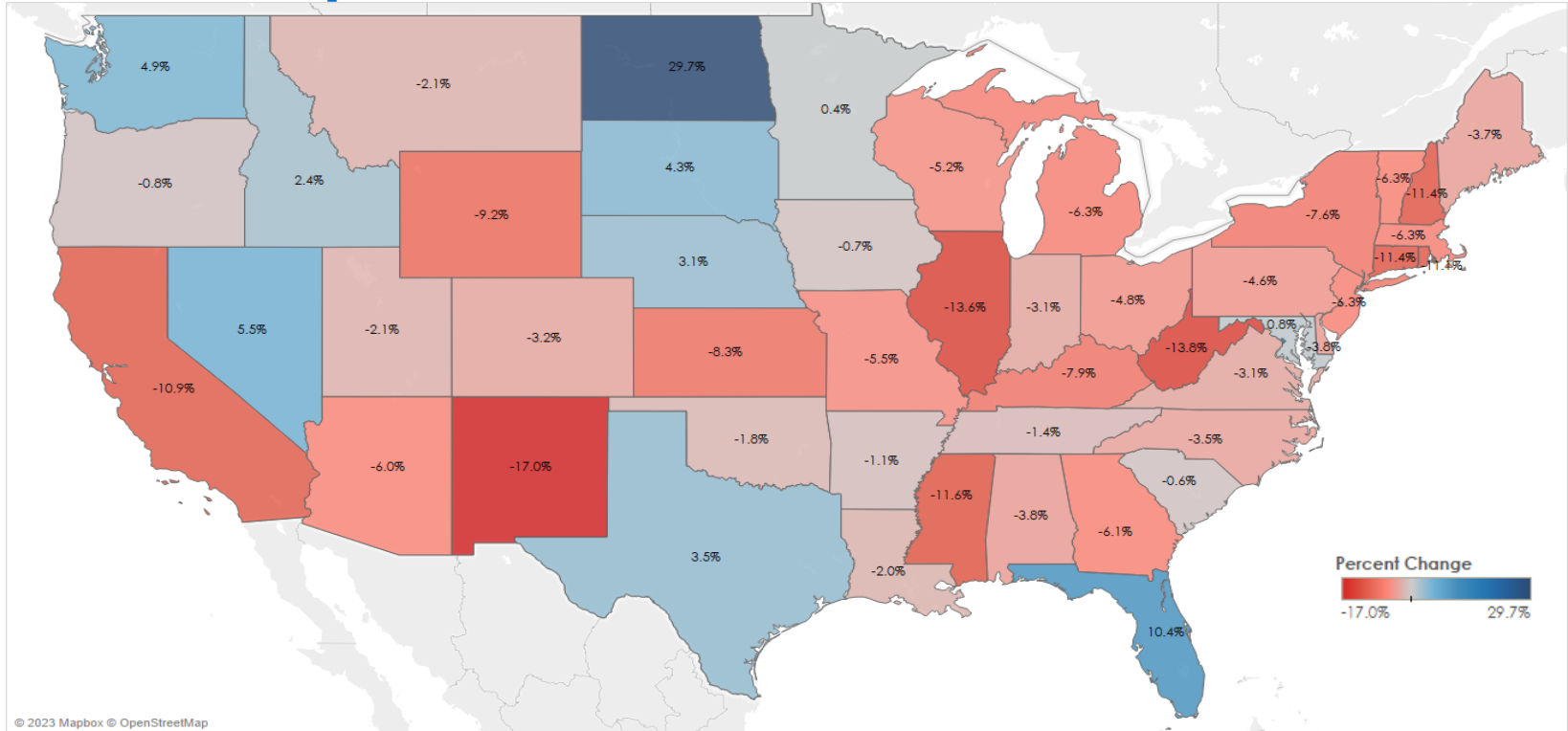
- Changing demographics present a new picture of current students;
- FAFSA filing rate for Class of 2022 graduates was up slightly, but concerns persist, particularly for first-generation, high-need, and underrepresented minority students;
- Adult learners (age 25+) make up nearly 40% of the US undergraduate population

### *And...*

- Students are entering or transferring to our campuses having faced significant academic, psychosocial, and financial challenges in a global pandemic.

# Projected change in high school graduates (GA -6.1%)

*Public and non-public, 2023-24 to 2033-34*



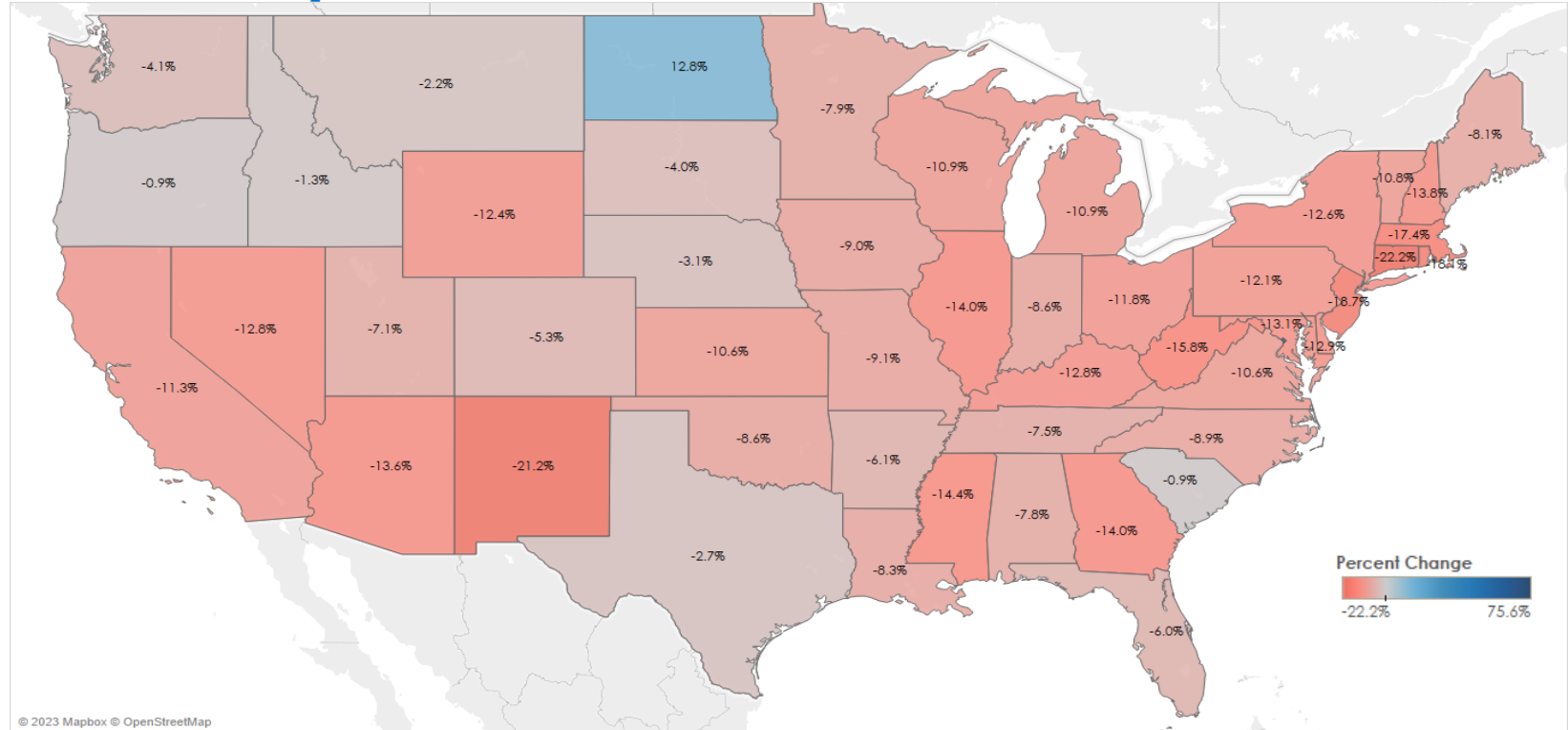
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Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, [www.knocking.wiche.edu](http://www.knocking.wiche.edu)

# Projected change in high school graduates (GA -14%)

*White, non-Hispanic, 2023-24 to 2033-34*



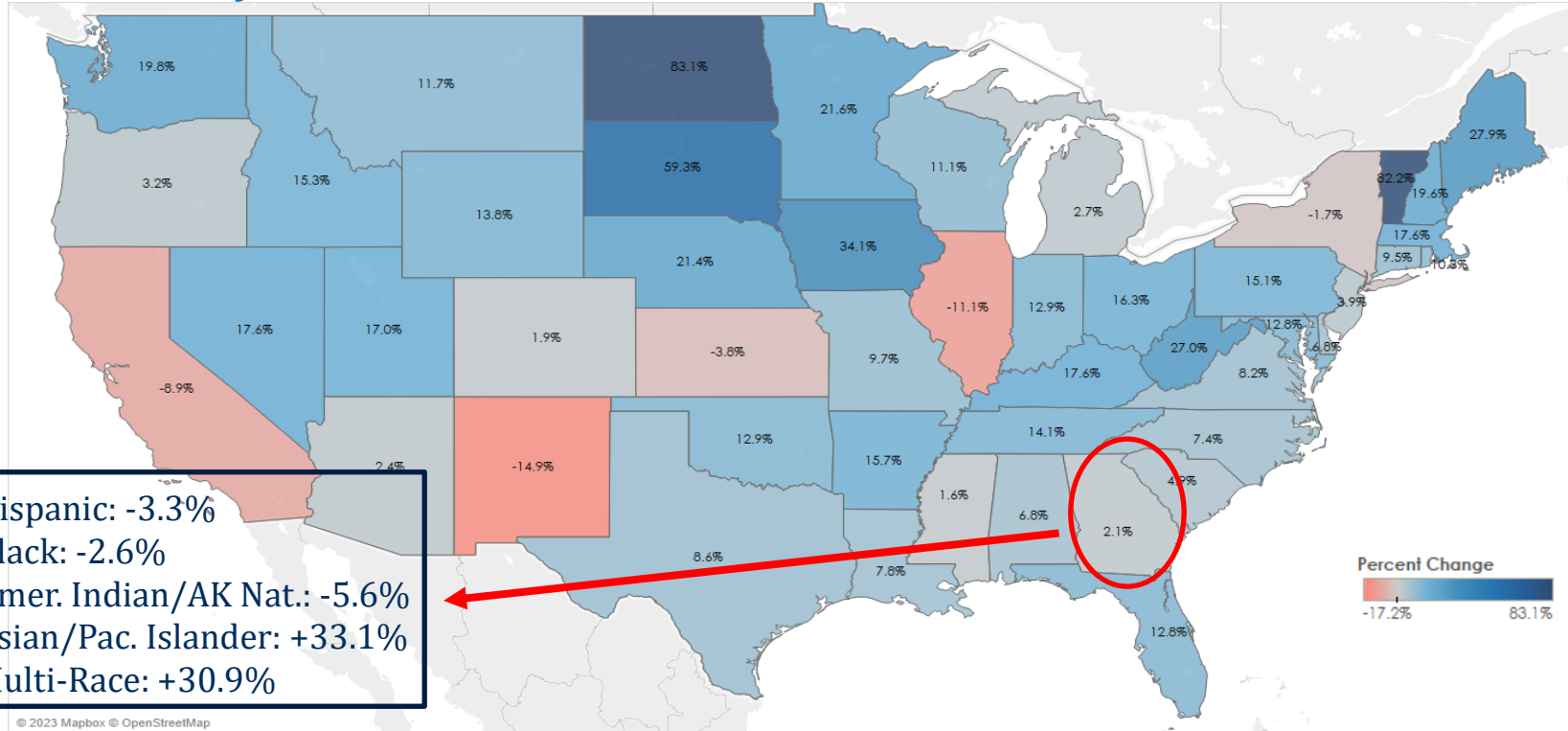
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Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, [www.knocking.wiche.edu](http://www.knocking.wiche.edu)

# Projected change in high school graduates (GA +2.1%)

## Students of color, 2023-24 to 2033-34



Hispanic: -3.3%  
Black: -2.6%  
Amer. Indian/AK Nat.: -5.6%  
Asian/Pac. Islander: +33.1%  
Multi-Race: +30.9%

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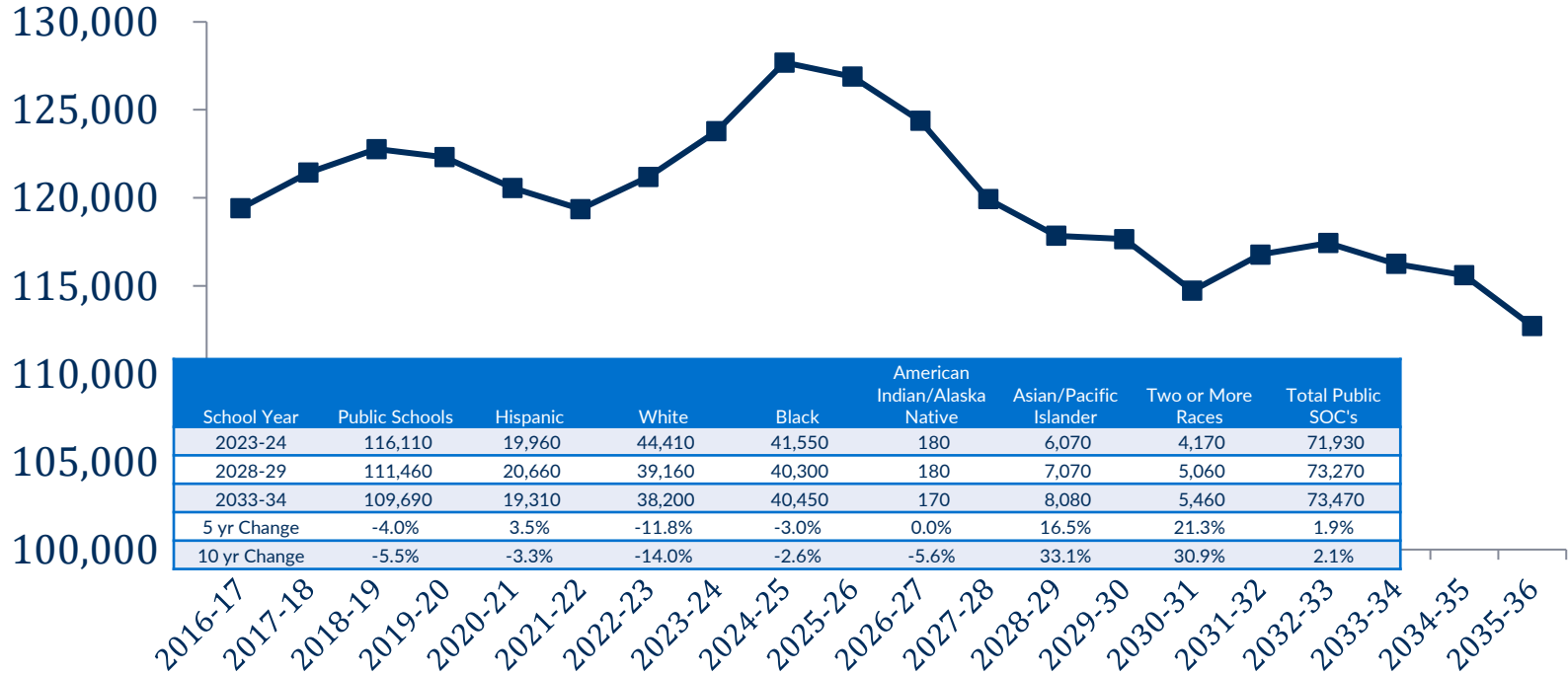


Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, [www.knocking.wiche.edu](http://www.knocking.wiche.edu)



# Projected change in high school graduates

## Georgia 2017-36



Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, [www.knocking.wiche.edu](http://www.knocking.wiche.edu)

# New student enrollment was down 13% last fall, high need and students of color represented the vast majority of the decline

**Table 4.** Estimated National Enrollment by Institutional Sector and Age Group: 2020 to 2022

Sector	Age Group	Spring 2022		Spring 2021		Spring 2020	
		Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
All Sectors	Under 18	704,133	-2.0%	718,460	-0.6%	722,843	6.9%
	18 to 24	9,674,810	-3.2%	9,991,267	-5.0%	10,515,363	-0.4%
	Over 24	5,791,324	-5.8%	6,145,574	-1.2%	6,220,100	-1.4%
Public 4-year	Under 18	169,205	-5.7%	179,389	2.7%	174,741	2.2%
	18 to 24	5,013,400	-2.5%	5,140,809	-2.0%	5,247,834	-0.3%
	Over 24	2,069,808	-5.3%	2,185,652	2.7%	2,128,668	-1.6%
Private nonprofit 4-year	Under 18	30,059	-0.9%	30,340	-6.4%	32,423	4.2%
	18 to 24	2,128,665	-0.5%	2,140,052	-2.8%	2,202,483	-0.4%
	Over 24	1,524,273	-3.4%	1,577,529	2.3%	1,541,556	-1.3%
Private for-profit 4-year	Under 18	1,363	9.7%	1,243	12.9%	1,101	-5.3%
	18 to 24	143,770	6.3%	135,294	0.8%	134,264	2.2%
	Over 24	571,742	-1.8%	582,020	-2.0%	593,999	-2.8%
Public 2-year	Under 18	498,812	-1.1%	504,446	-1.2%	510,389	8.7%
	18 to 24	2,223,198	-7.1%	2,392,844	-13.2%	2,758,183	-2.5%
	Over 24	1,447,920	-10.8%	1,623,756	-6.1%	1,728,470	-4.8%



# Georgia

## Where do Georgia high school graduates attend college?

86,780 Georgia high school graduates attend college (in any state)			
Rank	Where do they go?	How many?	Share of total enrollment
1	Georgia	69,284	79.8%
2	Alabama	2,871	3.3%
3	Florida	1,744	2.0%
4	Tennessee	1,697	2.0%
5	South Carolina	1,268	1.5%
6	North Carolina	1,146	1.3%
7	New Hampshire	641	0.7%
8	Virginia	592	0.7%
9	New York	558	0.6%
10	Ohio	478	0.6%
Sum (of top 10)		80,279	92.5%

# Georgia

## The competition factor



	In-state Counts	Percentage	Rank
2021-22 High School Seniors*	119,360		8th
Institutions of Higher Education**	118		9th
College Continuation***	91,148	76.4%	16th
Leave the State to Go to College***	18,882	15.8%	21st

Largest Institutions***	In-state Freshman***	Estimated Market Share^
University of Georgia	4,809	5.28%
University of North Georgia	4,293	4.71%
Georgia Southern University	4,049	4.44%
Georgia State University	4,008	4.40%
Kennesaw State University	4,001	4.39%

Remaining Students	Remaining Institutions	Students Per Institution
51,106	113	452

Sources:

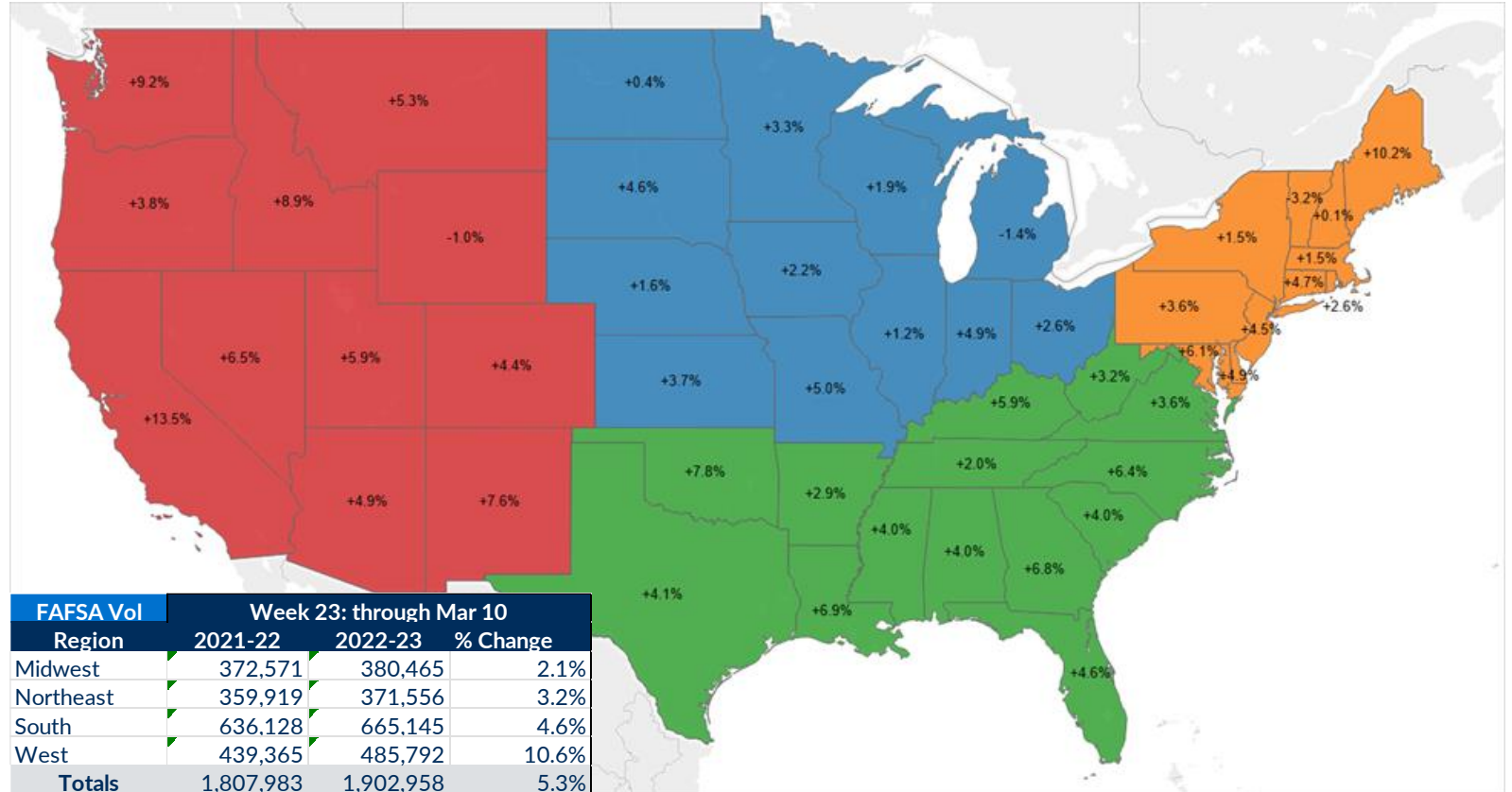
\*Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, [www.knocking.wiche.edu](http://www.knocking.wiche.edu)

\*\*National Center for Education Statistics, IPEDS, 2020

\*\*\*National Center for Education Statistics, Freshman Migration Data for 2018-19

# FAFSA Submission Volume by Region

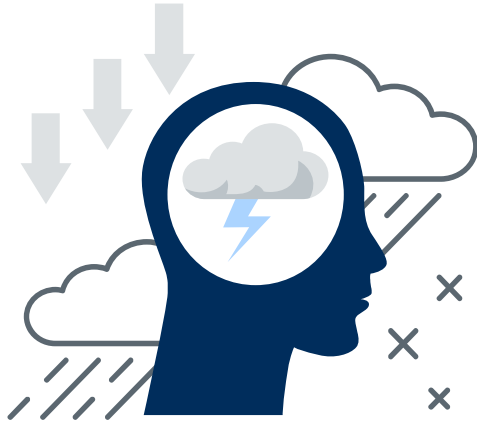
Change in FAFSA Volume through March 10, 2023





# The Current Landscape: Students

# Students' feelings about college planning activities



## Confusion

Understanding how they qualify for financial aid or scholarships  
Filling out financial aid forms  
Filling out the FAFSA  
Understanding the admissions requirements

## Fear

Forgetting to submit a required form  
Not knowing if they will be able to afford to pay for college  
Not knowing if I will get in into their first choice  
Doing an admissions interview in person

## Anxiety

Not knowing when I am going to hear if they got in  
Not knowing if they will be able to afford to pay for college  
Not knowing if I will get in into their first choice  
Doing an admissions interview in person

# Students' feelings about the transition to college



## They are excited about

- Finding themselves
- Being independent
- Not having constant supervision of adults
- Socializing
- Taking new classes

## They are cautious about

- Peer pressure
- Keeping up with their assignments
- Managing their own time
- Staying safe
- Reaching out when they need help

## They are anxious about

- Keeping up with their assignments
- Reaching out when they need help
- Peer pressure
- Managing their own time
- Taking care of themselves (physically and mentally)

## They are afraid of

- Peer pressure
- Not living with their family
- Reaching out when they need help
- Keeping up with their assignments
- Taking care of themselves (physically and mentally)



# College Students and Mental Health

- More than 60% of college students met the criteria for at least one mental health problem and 73% of students reported moderate or severe psychological distress.\*
- Nearly 6 in 10 college students report mental state negatively impacted their grades\*\*
- **More than 80% of students are feeling stress and anxiety, with 75% saying it has impacted their academic work.\***
- From 2013 to 2021, researchers found depression among college students increased by nearly 135%.\*
- **Students who engage in counseling *and* participate in co-curricular activities are 51% less likely to withdraw from school\*\*\*\***

64%



Students who leave college because of mental health issues\*\*\*



\*Healthy Minds Study

\*\*Fortune conducted by the Harris Poll

\*\*\*National Alliance on Mental Illness (NAMI)

\*\*\*\*Center for Collegiate Mental Health. (2023, January). *2022 Annual Report* (Publication No. STA 23-168)

# Student Motivations Differ by Type

## *Adult vs. Traditional Students*

ITEM	ADULT	TRADITIONAL
Prepared to make the sacrifices needed to reach goals	96%	89%
Have found an occupation that interests them	90%	83%
Greater family understanding and support	85%	76%
Perceive educators more positively	84%	77%
Have developed a solid system of self discipline	73%	60%
See the benefits of tutoring in one or more of their classes	67%	59%
Have a career action plan that guides their studies	61%	52%
Greater pleasure from reading	60%	37%
Ability to manage finances without having to work more hours	55%	45%
Less doubt about the value of earning a college degree	19%	36%

N = 3,458 Adult Learners (25+)  
 N = 5,604 Traditional Students (18-24)



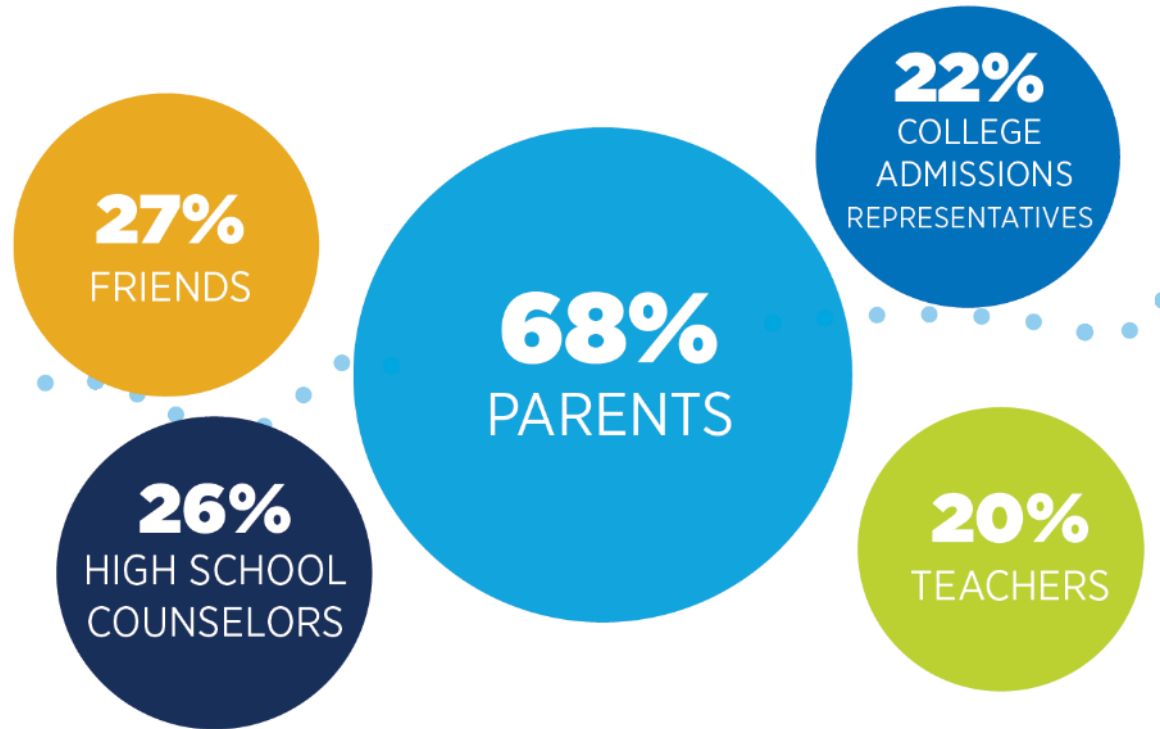
# Top 10 areas of assistance for adult learners





# The Current Landscape: Families

# Who are influencers for students?



# Influencers by grade level

INFLUENCERS	9 <sup>TH</sup>	10 <sup>TH</sup>	11 <sup>TH</sup>	12 <sup>TH</sup>
Parents	66%	68%	69%	68%
High school counselors	28%	29%	24%	24%
College admissions representatives	19%	26%	23%	19%
Teachers	13%	27%	21%	18%
Friends	44%	23%	30%	25%

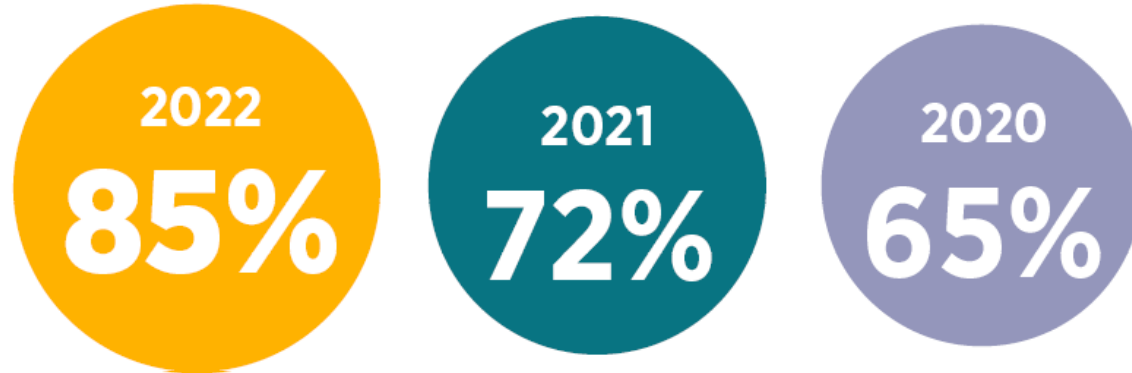
# 5 key findings about families of students

- 1 Nearly all families want weekly communication from institutions
- 2 More than 4 out of 10 families would like to receive text messages
- 3 Most families are satisfied with the college experience of their students, but there is room for improvement in specific areas
- 4 Nearly 40 percent of families attend virtual events, and  $\frac{3}{4}$  are satisfied with those events
- 5 3 out of 4 families say financing college is difficult



# Communication from colleges and universities

*In two years, the number of families preferring weekly communications has increased by 20 points*





# What do families want to learn more about?



**85%**  
ACADEMIC  
CALENDAR



**66%**  
PARENT/FAMILY-SPECIFIC  
PROGRAMS



**73%**  
COSTS AND TUITION



**59%**  
ACADEMICS (PROGRAMS,  
MAJORS, AND MINORS)



**49%**  
RESIDENTIAL LIFE /  
HOUSING INFORMATION



**70%**  
THE ATHLETIC SEASON



**58%**  
FINANCIAL AID AND  
SCHOLARSHIPS



**38%**  
VIRTUAL EVENTS FOR  
PARENTS AND FAMILY

# Demographics that are more likely to:



## Prefer text messages

- Hispanic families
- First-generation families
- Family income less than \$100,000
- Families with students in the first two years of college
- Families with students living at home



## Prefer the telephone

- Black families
- First-generation families
- Family income less than \$60,000
- Families with students living at home



## Prefer the family/parent portal

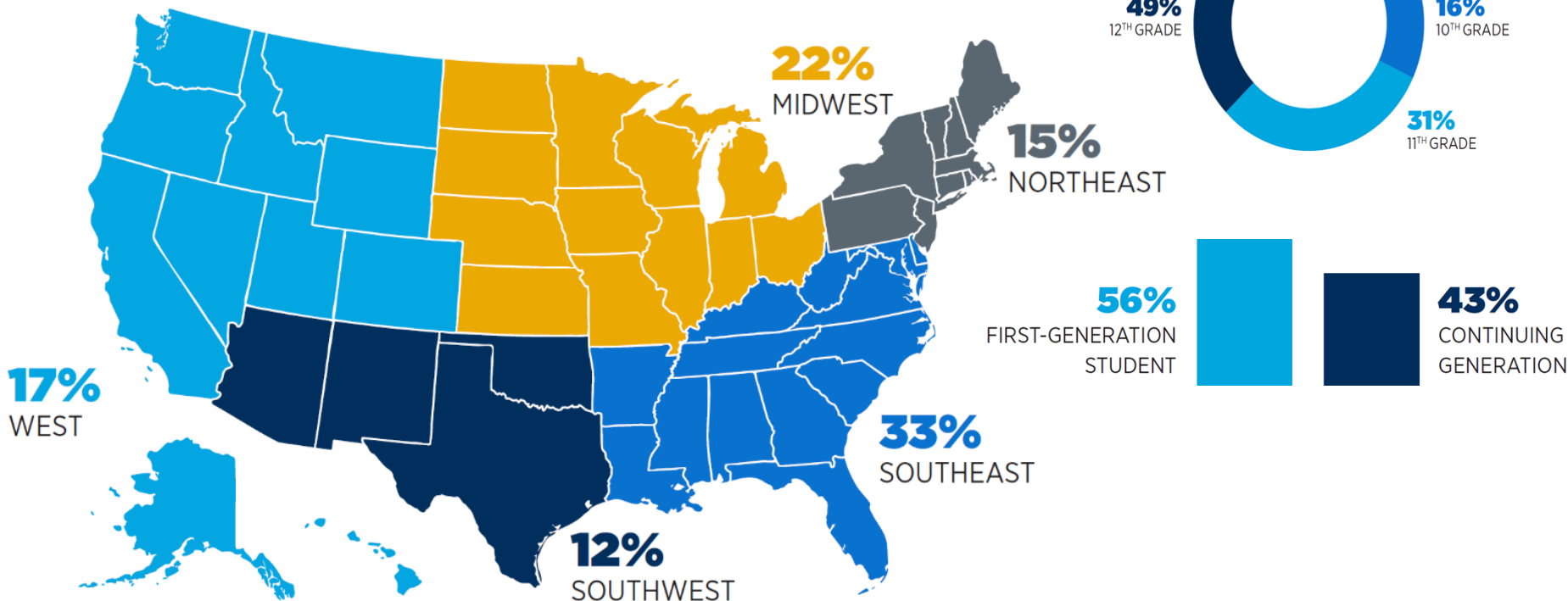
- Black families
- Family income more than \$100,000
- Families with students in the first year of college
- Families with students living on campus



# The Current Landscape: College Planning and Recruitment

# About the study

## Region, grade level, student type

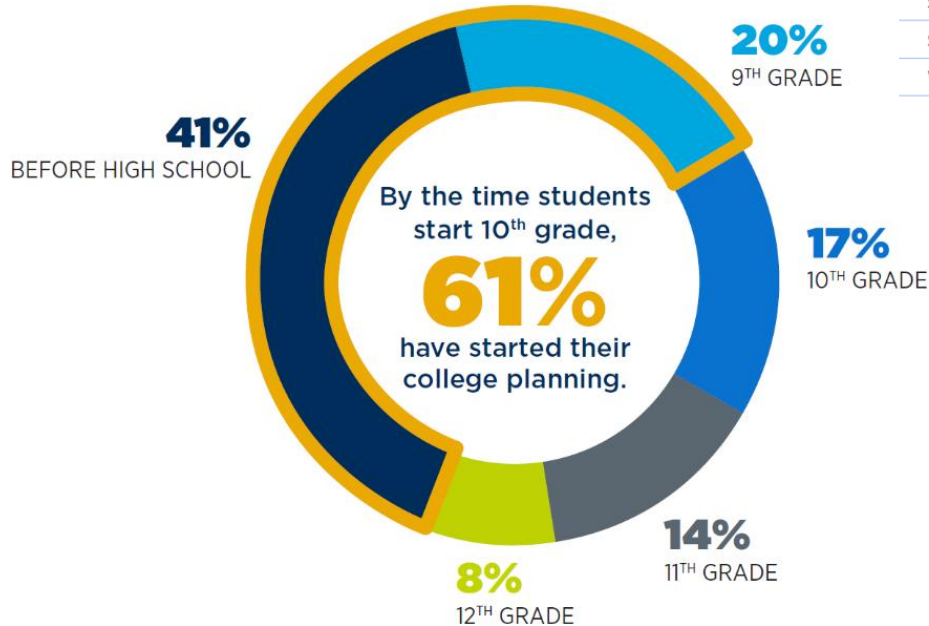


Ruffalo Noel Levitz (2022). *High School Student College Planning Report*



Responses from families are taken from the *2022 Prospective Family Engagement Report*, available at [RNL.com/Papers](https://www.rnl.com/Papers).

# When does college planning start?



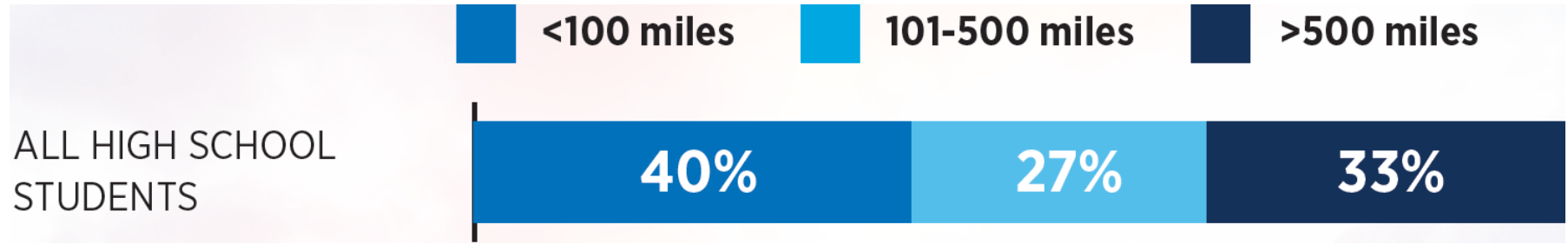
REGION	STARTED PLANNING BEFORE HIGH SCHOOL OR 9 <sup>TH</sup> GRADE
Northeast	57%
Midwest	58%
Southeast	60%
Southwest	65%
West	67%



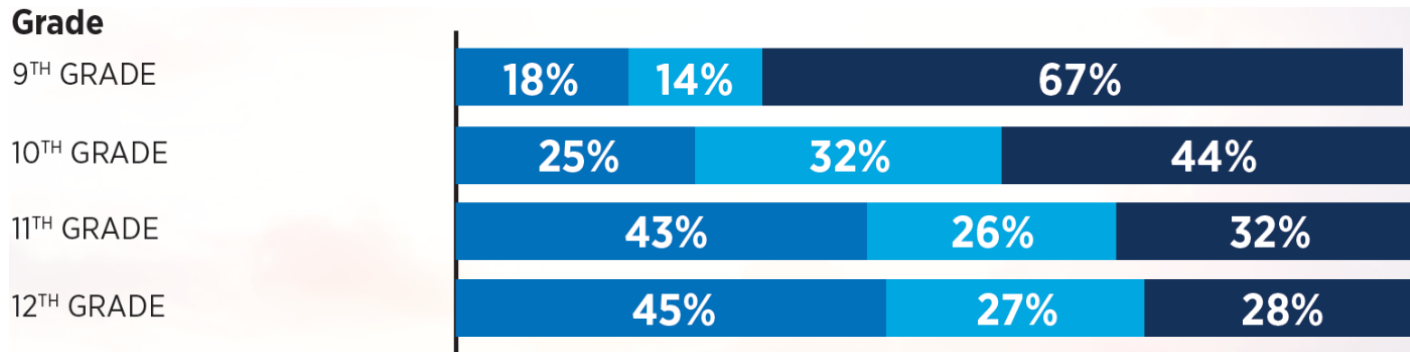
# Five most important topics for students for college planning

<b>1</b>	<b>Academics (programs, majors, minors, etc.)</b>	<b>73%</b>
<b>2</b>	<b>Cost (tuition, fees, room, and board, etc.)</b>	<b>67%</b>
<b>3</b>	<b>Financial aid and scholarships</b>	<b>54%</b>
<b>4</b>	<b>The location (town, area, local spots, etc.)</b>	<b>36%</b>
<b>5</b>	<b>The strength of the academic programs (ratings, rankings, etc.)</b>	<b>32%</b>

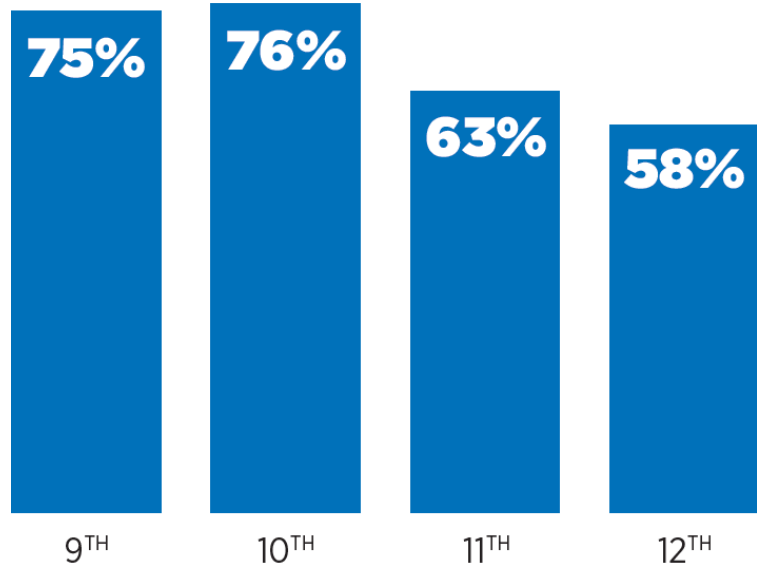
# How far are students planning to travel to attend college?



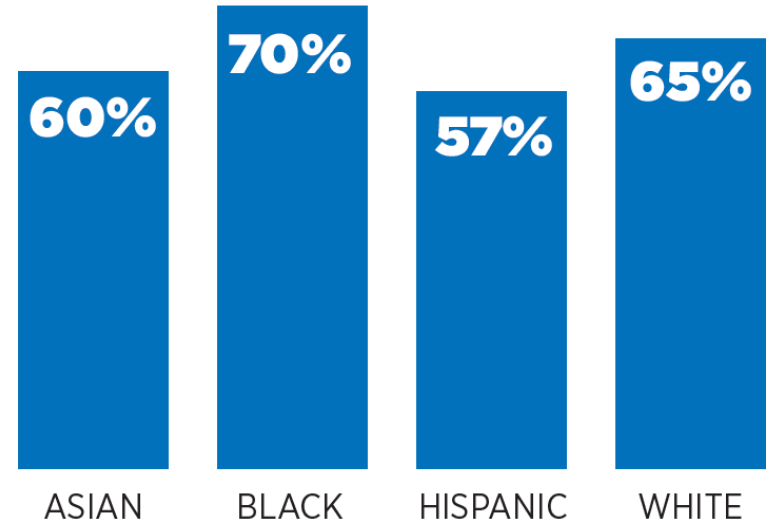
...but as they get closer to high school graduation, they are more likely to stay closer to home



## Students considering out-of-state by grade level



## Students considering out-of-state by ethnicity



FIRST-GENERATION STUDENT

56%

CONTINUING GENERATION

71%





# What information have students received/seen?

<b>Academics (programs, majors, minors, etc.)</b>	<b>85%</b>
<b>Location (town, area, local spots, etc.)</b>	<b>85%</b>
<b>Financial aid and scholarships</b>	<b>77%</b>
<b>Cost (tuition, fees, room, and board, etc.)</b>	<b>74%</b>
<b>Community life and activities</b>	<b>74%</b>
<b>Strength of the academic programs (ratings, rankings, etc.)</b>	<b>73%</b>
<b>Admission requirements</b>	<b>73%</b>
<b>Why the institution is different</b>	<b>71%</b>

# Have received/seen information (12th graders by ethnicity)

INFORMATION	ASIAN	BLACK	HISPANIC	WHITE
Academics programs, majors)	97%	88%	90%	91%
Strength of academic programs	98%	76%	72%	80%
Financial aid and scholarships	92%	88%	89%	87%
Why the institution is different	93%	80%	72%	82%

**When we segment communications by ability, region, and intended major...are we also unintentionally segmenting by race?**

# Have received/seen information (12th graders by generation status)

INFORMATION	FIRST-GENERATION STUDENT	CONTINUING GENERATION
Academic (programs, majors)	84%	95%
Strength of academic programs	73%	83%
Financial aid and scholarships	83%	93%
Admission requirements	79%	90%
Application process and timeline	76%	91%
Why the institution is different	75%	85%
Cost	80%	89%

# Admissions and Standardized Test Plans

*Students were asked whether they would take the ACT and SAT.*

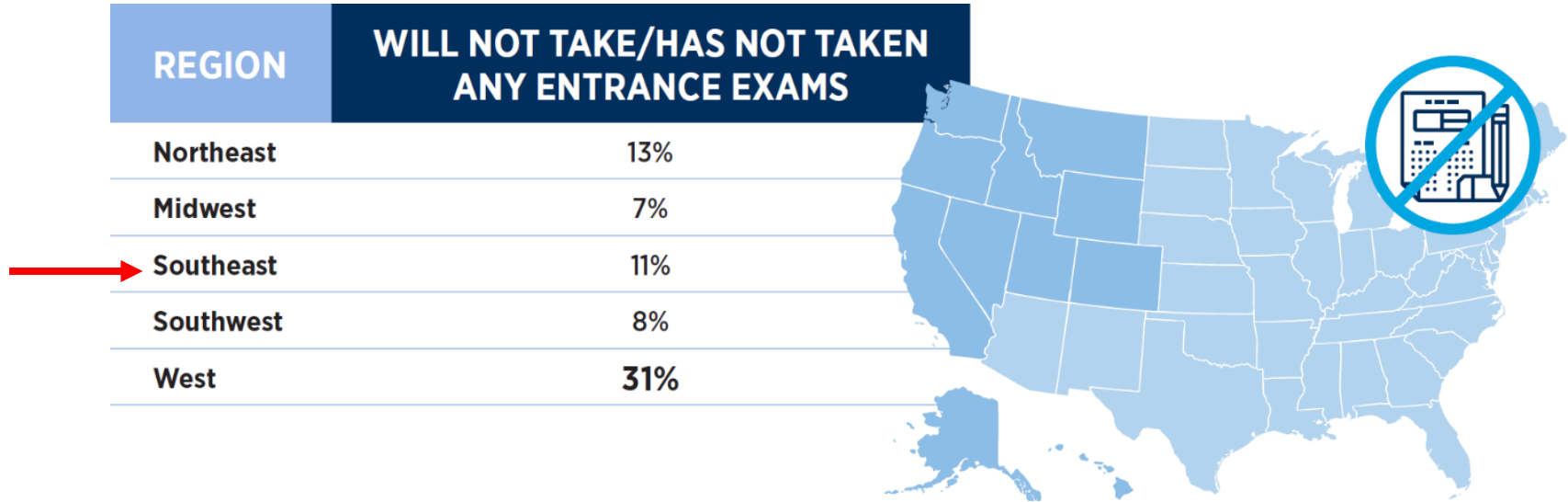
TEST PLANS	FAMILIES	STUDENTS
The student will take the ACT.	22%	20%
The student will take the SAT.	40%	32%
The student will take both the ACT and SAT.	23%	34%
The student has no plans on taking any tests.	15%	14%

REASON	FAMILIES	STUDENTS
The student is not planning on applying to any colleges that require tests.	→ 57%	42%
The family does not believe tests are a good measure of student.	→ 52%	41%
Our student is not a good "test-taker."	27%	39%
The family can't afford to pay for tests.	5%	19%



# Admissions and Standardized Test Plans

## *Students' test plans by region of the country*



# Admissions and Standardized Test Plans

## *Reasons students will take exams*

It will allow me access to additional scholarship opportunities.

51%

I am planning on applying to colleges that require tests.

32%

Everyone in my high school takes the tests.

32%

# Admissions and Standardized Test Plans

OPINION	FAMILIES	STUDENTS
<b>All should be test-optional.</b>	48%	47%
<b>Institutions that require tests are better/more prestigious.</b>	27%	21%
<b>There is no difference.</b>	25%	36%
<b>The family can't afford to pay for tests.</b>	5%	19%



# High School Student Perceptions & Motivations



# Students' perception of value: Change over time

*Question: "I often wonder if a college education is worth the time, money, and effort that I'm being asked to spend on it."*

**26%**

**2021**

(mid-pandemic)

**25%**

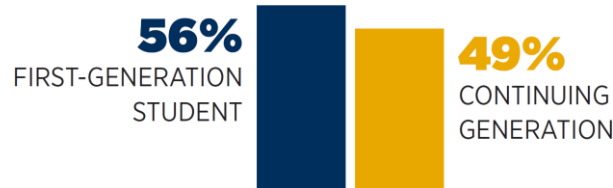
**2019**

(post-recession)

**17%**

**2009**

(mid-recession)



# Desire to finish college by ethnicity

DESIRE TO FINISH COLLEGE	ASIAN	HISPANIC	NATIVE	BLACK	WHITE	OVERALL
I am strongly dedicated to finishing college.	95%	95%	94%	95%	95%	95%
Of all the things I could do now, going to college is most satisfying.	77%	78%	78%	81%	75%	77%
I wonder if college is worth the time, money, and effort.	30%	29%	22%	34%	20%	25%

# First-Year Student Priorities: Fall 2021

## *Connections, careers dominate their top priorities*

TOP 10 PRIORITIES FOR INCOMING FIRST-YEAR STUDENTS	2020	2019
Meet new friends	75%	73%
Help selecting an educational plan to get a good job	70%	69%
Talk about qualifications needed for certain occupations	67%	69%
Find out more about clubs and organizations	66%	57%
Receive help to improve student habits	65%	69%
Receive instruction on how to take college exams	65%	68%
Talk with someone about getting a scholarship	63%	67%
Talk with someone about salaries and future occupations	57%	60%
Meet an experienced student to seek advice	55%	56%
Talk about advantages/ disadvantages of various careers	53%	55%





# Questions to Consider

# Questions to Consider

## *Enrollment Management*

- How would you finish this sentence: “Students enroll at [insert college name here] because \_\_\_\_\_.”
  - How do you know? Which of these reasons is distinct from your peers?
- How has your student population changed over the past five years?
  - How have your recruitment and retention strategies changed as a result?
- What would a seamless path to admission, progression, and graduation look like at your institution?
  - What are some barriers to this path that you could address in the next 30 days? 90 days? In your annual plan?

# Thank You

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# Additional Insights

# Markets that are attracting a lot of interest

- Transfer students (dual-admission, financial incentives, program-level articulation, 2+3 MAs)
- Dual-enrollment
- Hispanic students
- Military and military families
- Like-minded churches/denominations
- Specialty high schools
- Out-of-state/non-resident students (where are other schools in your region successful?)
- Targeting employers through more intentional business development activities
- Online students (Your Institution Online/Global)



# What are our transfer students telling us they need now?

Priority	% Requesting Assistance
Identify work experiences or internships related to my major.	79.2%
Define goals suited to my major or career interest(s).	67.9%
Explore advantages and disadvantages of my career choice.	66.7%
Prepare a written academic plan for graduation.	65.5%
Figure out the impact of my grades on my desired major.	60.9%
Discuss options for financing my education.	58.0%
Find ways to balance the demands of school with work.	55.3%
Find tutors in one or more of my courses.	52.4%
Get help with study skills (time management, taking notes, etc.).	52.0%
Find better ways to manage my personal finances.	50.9%