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INTRODUCTION

The Association of Colleges surveyed college leaders at all member colleges in England in October 2023 (return date 6 October 2023) to gather early information about enrolments. AoC has collected data from colleges in this way for more than twenty years to provide an indication of enrolments in advance of the comprehensive national census collected by ESFA in the Individual Learner Record (ILR) (census as at 1 November 2023, return date 6 December 2023). 95 colleges chose to make a return to AoC’s 2023 enrolment survey.

EXECUTIVE SUMMARY

Our survey of 95 colleges shows:
- a substantial increase in 16-18 enrolments
- at least half of the colleges surveyed recruited fewer T level students than expected
- progression rates from T level transition programmes to T levels remain low due to the nature of the T level
- the great majority of colleges had substantial increases in GCSE and functional skills English and maths enrolments
- a third of college leaders said that apprenticeship recruitment was on target, meanwhile 20% saw a drop in enrolments
- adult enrolments are, for the majority, on target or growing, perhaps reflecting a post-pandemic confidence to return to learning
- demand for ESOL continues to grow with demand outstripping supply and many colleges having waiting lists
- free Courses for Jobs enrolments are on target for most of those colleges delivering those programmes, improving on last year.
A total of 95 colleges responded, which represents just less than half of college corporations. The vast majority (81%) were general further education or tertiary colleges, while 7% each were sixth form and specialist colleges. This is broadly in line with responses to our 2022 survey. Please note that response levels to each question vary according to the provision offered at each respondent college.

Responding colleges were based right across England, with strong representation in all AoC regions. Again, this mirrors 2022 survey responses.
Overall, most colleges saw an increase in enrolments, compared to the 2022/23 academic year. While we saw a similar trend last year, the level of growth was much greater this year, with 39% of leaders who responded saying their college had seen a growth of 10% or more – over one in five had 10-14.9% more enrolments and eight % each had 15-19.9% and 20% or more of an increase. A further 28% had 5-9.9% more enrolments. Only 6% saw a drop in enrolments.
When it comes to T levels, the survey results paint a very different picture. Across all T levels, the proportion of colleges that recruited as expected was lower than last year.

In 2023, 18 T level subjects are being taught. In 11 of these subjects, at least 50% of colleges surveyed had recruited fewer students than expected. In 2022, when 16 T level subjects were taught, in 10 of these subjects, at least 50% of colleges surveyed recruited fewer students than expected.

Across both years, there are five T levels in which the majority of colleges recruited fewer students than expected in both years: digital business services, digital support services, science, health and onsite construction.
In 2023 only in two subjects (Maintenance Installation for Repair for Engineering and Manufacturing and Agriculture, Land Management and Production) did at least half of colleges recruit their expected number of students. In the other 16, the majority either recruited fewer or more than they expected.
In all T levels offered, under a third of colleges recruited a higher number of students than expected in 2023, which is a similar trend to 2022.
Progression rates from T Level transition programmes to T levels were generally low – in the vast majority of colleges, fewer than 20% of learners moved into the T level provision from the transition programme. It should be noted that not all colleges offering a T level will offer the T level transition (now foundation) courses.
Students not meeting the entry requirements for T levels was the most commonly cited reason for learners not moving into a T level from the transition programme. However, progression into apprenticeships, other further study or employment were also cited by a significant number of the colleges where transition rates were below 50%. This highlights that not moving on to a T level cannot be equated to “failing” the transition programme. Instead, they can provide pathways for learners into other courses or work.

Principals also said there was sometimes a lack of motivation from learners, and a number said T levels were more challenging than other Level 3 programmes, and therefore out of reach for these students.
Most colleges said they required a grade 4 in English and maths from student studying T levels. However, this wasn’t the case across the board – with some colleges requiring a grade 5, some varying entry requirements depending on T level subject, and some looking for a combination of grades.

<table>
<thead>
<tr>
<th>Grade 4</th>
<th>Grade 5</th>
<th>Grade 4 for all except grade 5 Engineering</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 GCSES, grade 4 English and/or maths</td>
<td>4-5 GCSEs (course dependent), grade 5 English and maths</td>
<td>5 GCSES, grade 5 English and/or maths (and science/related subject)</td>
</tr>
<tr>
<td>Full Level 2 including GCSE English and maths</td>
<td>Successful pass from T-Level transition course</td>
<td>PM at L2 Extended Certificate in relevant area and L2 English and maths</td>
</tr>
</tbody>
</table>
Similarly, colleges cited different English and maths requirements for those wanting to study T level transition or foundation programme study. However, a grade 3 was the most commonly required grade.

### Summary of English and maths requirements for T level transition/foundation programme students

<table>
<thead>
<tr>
<th>Grade 3</th>
<th>Grade 4</th>
<th>Grade 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Based on potential</td>
<td>5 GCSEs, inc. grade 4 English and maths</td>
<td>Depends on the programme</td>
</tr>
<tr>
<td>Lower than grade 2 commence L1 programme with functional skills</td>
<td>Same entry as other L2 courses</td>
<td></td>
</tr>
</tbody>
</table>

Enrolment survey summary report | November 2023
Enrolments in English and maths were up in over nine out of 10 colleges.

Colleges reported nearly 97,000 enrolments in GCSE maths, along with 86,445 in GCSE English. This means there were over 22,000 additional enrolments each in both of those subjects – a percentage increase of 35% in English, and 30% in maths.

Functional skills also saw a significant increase in enrolments compared to last year – although from a much lower benchmark. There were 21,466 enrolments in English and 29,847 in maths – an increase of 3,449 and 3,706, or 19% and 14%, respectively.
ENGLISH AND MATHS

Total enrolments for 2023/24

<table>
<thead>
<tr>
<th>Subject</th>
<th>Enrolments</th>
</tr>
</thead>
<tbody>
<tr>
<td>GCSE English</td>
<td>86,445</td>
</tr>
<tr>
<td>Functional skills English</td>
<td>21,466</td>
</tr>
<tr>
<td>GCSE maths</td>
<td>96,765</td>
</tr>
<tr>
<td>Functional skills maths</td>
<td>29,847</td>
</tr>
</tbody>
</table>

Additional enrolments since 2022/23

<table>
<thead>
<tr>
<th>Subject</th>
<th>Enrolments</th>
</tr>
</thead>
<tbody>
<tr>
<td>GCSE English</td>
<td>22,486</td>
</tr>
<tr>
<td>Functional skills English</td>
<td>3,449</td>
</tr>
<tr>
<td>GCSE maths</td>
<td>22,296</td>
</tr>
<tr>
<td>Functional skills maths</td>
<td>3,706</td>
</tr>
</tbody>
</table>

Percentage increase in enrolments since 2022/23

<table>
<thead>
<tr>
<th>Subject</th>
<th>Percentage Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>GCSE English</td>
<td>35%</td>
</tr>
<tr>
<td>Functional skills English</td>
<td>19%</td>
</tr>
<tr>
<td>GCSE maths</td>
<td>30%</td>
</tr>
<tr>
<td>Functional skills maths</td>
<td>14%</td>
</tr>
</tbody>
</table>
The largest proportion of colleges saw between 500 and 2000 enrolments in GCSE maths (about 30% with 501-1000 and 30% with 1001-2000) and English (just under 30% saw 501-1000 and around 25% saw 1001-2000 enrolments) this year. For functional skills, most colleges had much smaller groups sign up, with over one in five colleges having functional skill English cohorts of 101-250, for example.

No colleges in the survey saw a decrease in the number of GCSE English and maths enrolments this year – the largest number saw between 101 and 250 extra enrolments in these qualifications – but one college had between 2001 and 3000 extra enrolments in GCSE maths and one had between 1001 and 2000 more students in GCSE English. Twelve and nine colleges had between 501 and 1000 extra students in GCSE English and maths, respectively.
In percentage terms, that means a significant proportion of colleges saw huge increases in student numbers – nearly two thirds of colleges saw increases of over 20% in GCSE English, and 7% saw an increase of over 100%.

Similarly, 6% of institutions in the survey more than doubled their GCSE maths numbers – with 44% seeing growth of over 20%.

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**Percentage change in enrolments for GCSE English**

<table>
<thead>
<tr>
<th>Percentage change</th>
<th>Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 100% increase</td>
<td>1%</td>
</tr>
<tr>
<td>91% to 100% increase</td>
<td>1%</td>
</tr>
<tr>
<td>81% to 90% increase</td>
<td>1%</td>
</tr>
<tr>
<td>71% to 80% increase</td>
<td>3%</td>
</tr>
<tr>
<td>61% to 70% increase</td>
<td>2%</td>
</tr>
<tr>
<td>51% to 60% increase</td>
<td>5%</td>
</tr>
<tr>
<td>41% to 50% increase</td>
<td>14%</td>
</tr>
<tr>
<td>31% to 40% increase</td>
<td>14%</td>
</tr>
<tr>
<td>21% to 30% increase</td>
<td>17%</td>
</tr>
<tr>
<td>11% to 20% increase</td>
<td>7%</td>
</tr>
<tr>
<td>1% to 10% increase</td>
<td>7%</td>
</tr>
<tr>
<td>More than 100% decrease</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Percentage change in enrolments for GCSE Maths**

<table>
<thead>
<tr>
<th>Percentage change</th>
<th>Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 100% increase</td>
<td>6%</td>
</tr>
<tr>
<td>91% to 100% increase</td>
<td>1%</td>
</tr>
<tr>
<td>81% to 90% increase</td>
<td>1%</td>
</tr>
<tr>
<td>71% to 80% increase</td>
<td>4%</td>
</tr>
<tr>
<td>61% to 70% increase</td>
<td>1%</td>
</tr>
<tr>
<td>51% to 60% increase</td>
<td>3%</td>
</tr>
<tr>
<td>41% to 50% increase</td>
<td>6%</td>
</tr>
<tr>
<td>31% to 40% increase</td>
<td>9%</td>
</tr>
<tr>
<td>21% to 30% increase</td>
<td>12%</td>
</tr>
<tr>
<td>11% to 20% increase</td>
<td>18%</td>
</tr>
<tr>
<td>1% to 10% increase</td>
<td>13%</td>
</tr>
<tr>
<td>More than 100% decrease</td>
<td>1%</td>
</tr>
</tbody>
</table>
On functional skills, the picture is different – with a number of colleges seeing a decrease in enrolments and overall growth much smaller both in English and maths.
Generally, the range of students colleges plan to put forward for resits in November 2023 was more limited than the group they plan to enter for exams next summer. The most common reason for entering learners at this stage was if students had been between close reach of the required grade 4 previously. However, some colleges said they would put all resit students forward for the November resits.
GCSE retake criteria for November 2023 only

Within [2-10] marks of grade 4

- Grade 3 previous summer series (one inc. studied for at least a year)

- Grade 3 and attend extra resit classes

- Encourage all students to retake in November

Grade 3 and achieve:

- A small number with below grade 3 but who scored well during September 2023 initial assessments
- GCSE English - returning students within 5 marks of passing and attend all sessions plus revision sessions
- GCSE maths - returning and new students as long as they attend all sessions

Strong chance of achieving grade 4

- Only a small volume of students identified as ready

Very close to pass and commit to additional lessons

Students last academic year/ previously, achieved a grade 3 close to the grade 4 boundary

Haven’t achieved grade 4

Self-selecting following IAG or based on ability to achieve grade 4

Grade 3 previously and successful completion of an internal assessment
GCSE retake criteria for Summer 2024 only

All enrolled students

Haven’t achieved grade 4

Have not achieved grade 4 in Maths or English or a Level 2 functional skill

Grade 2 or 3 prior attainment

Unsuccessful resit in Nov 23

Most entered in summer as not ready for Nov 23

Those who would like to resit for higher grade

Grade 2 or lower on entry

prior GCSE grade 1/2 OR prior Entry 3 functional skill OR did well on their initial assessment

All 16-19s

previous Grades 1-3 or have achieved E3 or higher FS previously

Those not ready for Nov 23 resit (longer period to study)

Must have sat GCSE or FS previously

All grade 3 in November, the rest in summer
When asked for general comments on their GCSE and functional skills enrolments, several respondents commented on the increased volume of those needing to study GCSEs as well as requiring resits, partly due to more students on full-time study programmes, as well as changed grade boundaries in Summer 2023.

One principal said: "A very large increase in our full time study programme student cohort, along with the more stringent grade boundaries applied to GCSEs in Maths and English nationally in summer 2023, have combined to create an uptick in the numbers studying these subjects."

A number of college leaders acknowledged the challenges in delivery due to a lack of resource, including staff and space shortages, as well as lack of invigilators for resits.

"The increased volume of GCSE resits has created a challenging environment for staffing and resources to ensure all students have the right teacher at the right time."

"The numbers are significantly higher than forecast placing additional burden on the college's resources including staff time and examination arrangements."

"The GCSE exams are difficult to administer for the exams team as many of our students have access arrangements. It would be easier if the electronic papers were released earlier."
The drivers behind the changes in enrolments were a lot less varied than in previous years. Last year, a large proportion of college leaders pointed to the cost-of-living crisis, the health of the local jobs market and the availability of work-based training, as well as the impact of summer GCSE grades. This year, however, while 43% of leaders cited the impact of 2023 summer GCSE grades as a reason for the change in enrolments, only a very small number felt any of the other factors contributed.
ENROLMENT TRENDS - CAUSES

Asked for other drivers behind their 16-18 enrolment trends, demographic changes were cited most commonly, while leaders also felt their institutions were benefiting from effective partnerships with schools, strong reputations, and improved facilities. A lack of alternatives in the local area and students lacking skills to take up other options were other factors cited.

<table>
<thead>
<tr>
<th>Increased demographics</th>
<th>Strong marketing and/or reputational advantage</th>
<th>Mental health and wellbeing</th>
<th>New/ refurbished facilities e.g., sport</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective College partnerships with local schools</td>
<td>Attracting students who did not achieve English and maths</td>
<td>Very limited local alternative offer for all lower level qualifications</td>
<td>16yr olds lack 'soft' skills for apprentices... work-based option</td>
</tr>
<tr>
<td></td>
<td>Increasing population in local area</td>
<td>Increased school leavers</td>
<td>Desire to re-engage post-Covid</td>
</tr>
</tbody>
</table>

| Travel barrier to College | Ofsted report |

| Ofsted report | 21 |
SUBJECTS WHERE COLLEGES SAW AN INCREASE OR DECREASE IN DEMAND

Decrease in 16-18 enrolments

- A Level (inc. English)
- Health and Social Care
- Land-based (animal care, management, agriculture, horticulture)
- Business (inc. BTEC First Diploma)
- Hair and Beauty
- E-Sports (BTEC National Extended Diploma)
- Electrical
- Journalism
- Plumbing
- Media
- Sport
- Level 3
- Public Services
- T Level
- Art and Design (Level 3)
SUBJECTS WHERE COLLEGES SAW AN INCREASE OR DECREASE IN DEMAND

Increase in 16-18 enrolments

Level 1 and 2 (generally due to lack of Grade 4 attainment)

Overall (inc. Full-time)

Business (inc. BTEC National Extended/Foundation Diploma)

Construction

Hair and Beauty

Art and Design (Diploma, Level 2, Visual Arts)

Engineering

Motor Vehicle

Land-based (Agriculture, Animal Care, Arboriculture, Land and...)

Childcare (inc. Early Years)

Digital

Foundation Learning

Science

Technology areas

Music

Media (inc. Creative Media Production and Technology Extended Diploma)

IT

Performing Arts

Public services

Entry Level

English

T Level

E-Sports

Retail and Commercial

Aviation Operations

Mixed programme enrolment

GCSE Plus - 5 results

Preparation for life and work
College leaders were slightly more optimistic about student retention this year, with 45% of leaders saying they believed retention would be better than last year, and fewer leaders than last year said retention would be broadly the same. A marginally bigger proportion said retention would be worse than last year – but that proportion sat at 5%.
Around one in five leaders said they were seeing higher than usual numbers of students not returning to two-year Level 3 programmes – but that proportion was significantly lower than last year, when it sat at 39%.
Only 5% of colleges saw between 101-200 students not returning to the second year of their two-year Level 3, and 6% each had 50 of fewer and between 51 and 100 students not returning.
Around a third of college leaders said their apprenticeship recruitment was on target. Meanwhile, just over one in five colleges saw a drop in apprenticeship enrolments, compared to 28% that saw an increase. That compares to only 14% of college leaders in 2022 saying they had seen a drop in enrolments, when at the same time, 41% saw an increase and for 36% their enrolment numbers were on target.

Engineering and construction were the most common areas where colleges saw an increase in apprenticeship numbers – followed by hairdressing, business and electrical. However, there were significant disparities in this area, with other institutions citing construction and engineering as areas where numbers had dropped.
APPRENTICESHIP ENROLMENTS

Increased apprenticeship enrolments by subject area

- **Engineering**
  - Construction increase, including Carpentry
  - Electrical (inc. Installation)

- **Business**
- **Electrical (inc. Installation)**
- **Hairdressing**
- **Project Management Certificate (PMO)**
- **Green technologies and retrofitting**
- **Health**
  - Science
  - Increase at HADA level
  - Strong in several areas
  - Nuclear
  - Geo Spatical
  - Agriculture
  - Accountancy
  - Property Maintenance
  - Commis Chef
Decreased apprenticeship enrolments by subject area

- Construction
  - Paused / limited certain standards
- Engineering
- IT
- Business
- Electrical Installation
- Bricklaying placement shortage
- Plumbing removed
- AAT removed
Colleges are facing a number of more general challenges, too – such a lack of employer engagement, staff shortages, and an overall low number of apprenticeship starts.
Higher education enrolments were on target in 31% of institutions this year. However, they were down on the previous year in 42% of institutions – with one in five colleges experiencing a drop of up to 9.9% and 18% seeing enrolments down by between 10% and 19.9%. Meanwhile, only 9% of colleges had higher HE enrolment numbers than their target number. These numbers broadly mirror the enrolment trend of 2022/23 – although last year, only a quarter of colleges recruited to their target number, and over half (52%) saw a drop compared to their target enrolment figures. Roughly one in five institutions saw a drop of between 5% and 9.9%.
Almost four in five institutions saw no significant change in the timing of HE enrolments this year – a higher proportion than last year. A smaller proportion of leaders said more students enrolled early or late.
### Subjects which saw a change in HE enrolments and delivery

<table>
<thead>
<tr>
<th>Engineering</th>
<th>Degree apprenticeships inc. Manufacturing</th>
<th>Media/ Journalism OU degree provision</th>
<th>Web Development (L5)</th>
<th>HNC Computing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counselling (L4)</td>
<td>HTQ</td>
<td>Progressing students</td>
<td>Non-prescribed HE</td>
<td>Professional Qualification</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Re-skilling / career change (Education)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Musical Theatre</td>
</tr>
</tbody>
</table>

Increase in higher education enrolments and delivery
SUBJECTS WHICH SAW A CHANGE IN HE ENROLMENTS AND DELIVERY

Decrease in higher education enrolments and delivery

<table>
<thead>
<tr>
<th>Losing enrolments to universities</th>
<th>Construction</th>
<th>Reviewing offer in Lifelong Learning</th>
<th>Reviewing offer of HTQ</th>
<th>FdSc and Fda</th>
<th>Teacher training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally low numbers</td>
<td>Conservatoire programmes</td>
<td>Healthcare</td>
<td>HNDS in Creative subjects</td>
<td>FD Business</td>
<td>Staff retention (esp. Construction, Engineering, Healthcare)</td>
</tr>
<tr>
<td>STEM (inc. L4)</td>
<td>Business and Law</td>
<td>Agriculture</td>
<td>FD Early Years</td>
<td>Removed Creative</td>
<td>Level 3 progressors</td>
</tr>
</tbody>
</table>
More colleges than last year recruited their target number of international students. Only 2% of colleges said their student numbers were down, and 14% of institutions said they recruited more international students – including EU students on visas – than their target number. In 2022/23, 6% of colleges recruited below their target number and 10% recruited more than their target number of students.

For academic year 2023/24, international travel has largely returned to normal following the Covid-19 pandemic, making it easier for students to consider studying in England. Furthermore, now that the UK sits outside the EU, all EU students without Settled Status or other forms of UK residency are counted within international student figures. However, the cost of living in the UK and the availability of student accommodation are two key challenges to international recruitment in FE.
Two in five colleges recruited their target number of adult learners – significantly more than the third that did so in 2022/23. Over a third had more adults enrol on courses than their target number – with the remaining 15% seeing a small decrease, in all but one cases, of below 14.9%. 6% of colleges saw increased recruitment of over 20% beyond their target recruitment number.

In 2022, 28% of colleges recruited fewer adults than their target number – with 7% of colleges recruiting at least 20% fewer. Meanwhile, only 1% of colleges recruited a number of adults that was at least 20% higher than their target number.
The subject most commonly cited as having seen a change in enrolments was ESOL (increase) – followed by English and maths (increase) and accounting (increase), as well as Access to HE – where a high number of colleges said they had seen a decrease.
The increase in ESOL coming through in the open question is backed by this year’s enrolment figures for adult ESOL courses. Three quarters of colleges recruited on or beyond their target enrolment number – with almost one in five seeing growth of up to 10%, nearly one in 10 seeing growth of 10-19.9% and 18% seeing growth of 20% or more.

Last year, by comparison, 43% of colleges recruited to or beyond their target number.
By far the biggest reason for an increase in ESOL enrolment was higher demand due to displacement, refugee status, and asylum seeking. Others frequently noted the high demand, and typically increased waiting lists as a result of inability to meet demands. A couple of respondents did report increasing their delivery capacity in order to meet demands. Colleges that have typically not delivered ESOL previously have developed provision in response to the Homes for Ukraine scheme. Ukrainian nationals have been placed across the country rather than the more normal concentration of refugees and asylum seekers in larger urban areas.
Colleges also recruited significant numbers of refugees from Ukraine – although the number of colleges that recruited none rose from 16% to one in four.
Almost a third of colleges said they did not deliver adult leisure courses in 2023/24. Meanwhile, nearly half said they had seen no change in the number of learners on these courses, compared to last year, with a further 6% seeing a decrease in numbers. 9% reported an increase in enrolment numbers for adult leisure courses.
Just over two thirds of college leaders in the survey reported that starts were in line with their expectation – an increase from last year, when that was the case in around half of institutions. Just below one in five colleges saw a number of starts that was lower than expected.
College leaders identified a range of opportunities to grow their Level 3 provision via Free Courses for Jobs, such as opportunities through job centres and waiting lists in subjects like ESOL.

**FREE COURSES FOR JOBS ENROLMENTS**

Opportunities in growing Level 3 learning via Free Courses for Jobs:

- **No barriers**
  - Development is key priority
  - Waiting lists in ESOL - huge opportunities

- **Opportunities via Job Centre becoming available**
  - Funding offered to meet demand (newly announced automatic payment of delivery to 150% of allocation value and post R04 automatic trigger for in-year growth)

- **Building staff capacity**
  - Remission become greater proportion of L3 adult learners
However, college leaders also saw barriers to this growth, most commonly including a lack of interest, a lack of flexibility in the programme, and a limited course offer.
SKILLS BOOTCAMP ENROLMENTS

Just over half of the colleges in the survey say they do not offer Skills Bootcamps – with 17% of college leaders saying they plan to run them by 2025. Just over one in five of the colleges in the survey have delivered them between 2021 and 2023. Those that are delivering them are finding the flexible nature benefiting the individual learner, the employer and the college. Work is ongoing by DfE to actively increase engagement.

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**Do you deliver Skills Bootcamps?**

- **22%** have delivered between 2021-2023
- **17%** aim to deliver by 2025
- **51%** no
- **11%** not applicable
SKILLS BOOTCAMP ENROLMENTS

Among these, the number of employers they have engaged with these Bootcamps has varied significantly – although more colleges said they engaged 21 or more employers than any other category. The numbers of employers engaged with will depend on the size of a college’s Skills Bootcamp delivery.

Since September 2022, how many employers have engaged with you on Skills Bootcamps?

- 0: 1%
- 1-5: 5%
- 6-10: 5%
- 11-20: 4%
- 21 or more: 6%