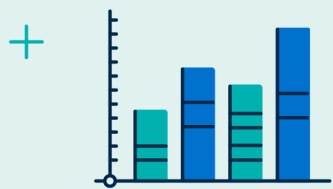




INSIGHT PAPER

College Search Trends Across Space and Time

A Deep Dive into the Regional Trends of Student Search Behaviors and Their Enrollment Impact



Enroll360

Project Director
Ryan Gardner-Cook, PhD

Legal Caveat

EAB Global, Inc. ("EAB") has made efforts to verify the accuracy of the information it provides to partners. This report relies on data obtained from many sources, however, and EAB cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, neither EAB nor any of its affiliates (each, an "EAB Organization") is in the business of giving legal, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, partners should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given partner's situation. Partners are advised to consult with appropriate professionals concerning legal, tax, or accounting issues, before implementing any of these tactics. No EAB Organization or any of its respective officers, directors, employees, or agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by any EAB Organization, or any of their respective employees or agents, or sources or other third parties, (b) any recommendation by any EAB Organization, or (c) failure of partner and its employees and agents to abide by the terms set forth herein.

EAB is a registered trademark of EAB Global, Inc. in the United States and other countries. Partners are not permitted to use these trademarks, or any other trademark, product name, service name, trade name, and logo of any EAB Organization without prior written consent of EAB. Other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names, and logos or images of the same does not necessarily constitute (a) an endorsement by such company of an EAB Organization and its products and services, or (b) an endorsement of the company or its products or services by an EAB Organization. No EAB Organization is affiliated with any such company.

IMPORTANT: Please read the following.

EAB has prepared this report for the exclusive use of its partners. Each partner acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to EAB. By accepting delivery of this Report, each partner agrees to abide by the terms as stated herein, including the following:

1. All right, title, and interest in and to this Report is owned by an EAB Organization. Except as stated herein, no right, license, permission, or interest of any kind in this Report is intended to be given, transferred to, or acquired by a partner. Each partner is authorized to use this Report only to the extent expressly authorized herein.
2. Each partner shall not sell, license, republish, distribute, or post online or otherwise this Report, in part or in whole. Each partner shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.
3. Each partner may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each partner shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each partner may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.
4. Each partner shall not remove from this Report any confidential markings, copyright notices, and/or other similar indicia herein.
5. Each partner is responsible for any breach of its obligations as stated herein by any of its employees or agents.
6. If a partner is unwilling to abide by any of the foregoing obligations, then such partner shall promptly return this Report and all copies thereof to EAB.



Education's Trusted Partner to Help Schools and Students Thrive



Your Imperatives Determine Ours

INSTITUTIONAL STRATEGY

Prepare Your Institution for the Future

Executive guidance rooted in research to support your strategic priorities

MARKETING AND ENROLLMENT

Achieve Your Enrollment and Growth Goals

Tailored partnerships powered by a recruitment ecosystem with unrivaled reach to enroll your future classes

STUDENT SUCCESS

Build a Student-Centric Campus

Technology trusted by 850 schools to retain, graduate, and empower more students

DIVERSITY, EQUITY, AND INCLUSION

Advance DEI on Campus and in Your Community

Technology, research, and bold initiatives to strengthen your DEI strategy and eliminate equity gaps

DATA AND ANALYTICS

Embrace Digital Transformation

Data and analytics solutions built for higher education to guide decisions and accelerate innovation

We partner with **2,500+** institutions to accelerate progress and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.

Executive Summary

Navigating Shifting Trends in Student Engagement and Enrollment

Plotting an effective enrollment strategy for your institution depends on having a clear understanding of key forces shaping higher education markets—not only in general but as they apply to schools specifically like yours. This comprehensive report explores the interplay of various factors influencing these trends, providing regional context and insights to help navigate the changing educational landscape effectively. These highlights offer a glimpse into the crosscutting trends presented within each section:

SECTION 1

Demographic Trends

- College-age populations already in decline across Midwest and Northeast.
 - Southeast and Southwest poised for growth, despite “cliff”.
 - College-going rates continue to decline.
 - Notable exceptions region by region.
-

SECTION 2

Application Trends

- Volume pivotal for enrollment growth.
 - Overall application growth, but it varies region to region.
 - Demographics impact growth, but not exclusively.
 - Highly localized variations by segment.
-

SECTION 3

Enrollment Trends

- Mixed enrollment trends across regions.
 - Complex interplay between demographic and enrollment shifts.
 - Selective-school advantage in many regions, though with exceptions.
 - Gender disparities in enrollment growth.
-

SECTION 4

Mobility Trends

- Students increasingly willing to travel.
 - Demographics are shaping the need for out-of-state enrollees.
 - Selective/private schools attractive, but non-selective/public schools catching up.
 - North-South divide in out-migration.
-

SECTION 5

Inquiry Trends

- Inquiry share shifting dramatically.
 - Demographics shape market dynamics, but active strategies matter.
 - Inquiries deliberate and occurring later.
 - Career-centric program attraction with gender-based preferences.
-

These insights, along with the granular trends in this report, will guide you in framing the right questions to position your institution within a field of possibilities tailored to your circumstances—contextualizing enrollment performance and forming an indispensable foundation for effective strategy.

Table of Contents

Introduction	6
Section 1: Recent and Future Demographic Trends	9
<i>Regional Demographic Changes in the 18-Year-Old Population and 4-Year College-Going Rate from 2017 to 2031</i>	
Data Sources: WICHE <i>Knocking at the College Door</i> , Higher Education Demand Index (HEDI) Projections	
Section 2: Recent Application Trends	17
<i>Regional Application Changes for First-Time Undergraduates at 4-Year Institutions from 2017 to 2021</i>	
Data Source: National Center for Education Statistics - IPEDS Fall Enrollment Survey	
Section 3: Recent Enrollment Trends	27
<i>Regional Enrollment Changes for First-Time Undergraduates at 4-Year Institutions from 2017 to 2021</i>	
Data Source: National Center for Education Statistics - IPEDS Fall Enrollment Survey	
Section 4: Recent Mobility Trends	35
<i>Regional Migration Changes for First-Time Undergraduates at 4-Year Institutions from 2017 to 2021</i>	
Data Source: National Center for Education Statistics - IPEDS Fall Enrollment Survey	
Section 5: Current Inquiry Trends	43
<i>Regional Inquiry Changes for Prospective 4-Year Students for the Classes of 2021 to 2023</i>	
Data Source: EAB Audiences - Appily & Intersect Inquiries	
Further Reading	57

Contextualizing Search and Enrollment Trends

Trends in Student Inquiries, Applications, and Enrollment in Their Regional and Demographic Context

Assessing an institution's performance in meeting enrollment goals is a cornerstone of sustained success. While internal funnel data provides valuable insights, a more comprehensive perspective is essential—one that encompasses the broader market dynamics to accurately gauge an institution's standing within the larger landscape. In this pursuit, reports on national trends, such as those curated by the National Center for Education Statistics, supply pivotal contextual insights that empower institutions to make meaningful comparisons of their performance. As you know, though, examining these trends at the national level can obscure important regional and sectoral differences that stem from variation in demographics and other local issues. That is why our understanding becomes stronger when informed by a thorough analysis of more granular factors that shape performance and potential.

With this mission in mind, the research presented here contextualizes deeper trends in student inquiries, applications, and enrollments among first-time undergraduates at four-year institutions. This exploration spans different geographic scales and market segments as outlined below:



Geographic Region: Nationwide, Across Five Distinct Regions, and by State

Understanding enrollment trends on a geographic scale is vital for decision-makers. Regional dynamics can have a profound impact on student preferences, with shifting population trends and economic conditions influencing prospective students' choices. Analyzing trends across different regions and states provides insights into where institutions are gaining or losing market share and highlights opportunities for targeted recruitment efforts.



Underlying Demographics: College-age Population, College-going Rate, and Student Gender

Demographics shape the foundation of an institution's potential applicant pool, meaning changes in the college-age population and variations in college-going rates impact an institution's prospective student base. Furthermore, gender-specific trends can uncover opportunities for tailored recruitment strategies, as enrollment dynamics can differ significantly between male and female students.



Institutional Selectivity: Admission Rates Above or Below 65 Percent

The selectivity of an institution plays a crucial role in shaping its applicant pool and enrollment outcomes. Institutions with higher admission rates face unique challenges and opportunities compared to those with lower admission rates. Examining trends based on selectivity provides enrollment leaders with insights into how their institution's position impacts application and enrollment figures.



Institutional Sector: Public versus Private Not-for-Profit

Distinguishing between public and private institutions is also essential for understanding enrollment trends within the context of the broader higher education landscape. Public and private institutions often have distinct recruitment strategies, funding models, and student demographics. Analyzing enrollment trends within each sector allows enrollment leaders to identify sector-specific challenges and opportunities.

By considering these variables, enrollment leaders gain a comprehensive understanding of their institution's performance within the evolving landscape of higher education enrollment. This research empowers enrollment professionals to make data-driven decisions, refine recruitment strategies, and proactively respond to changing market dynamics. In the subsequent sections, we delve into each of these variables to uncover nuanced insights that can guide enrollment strategies and position institutions for success.

1) Private not-for-profit or public four-year institutions with competitive admissions that have total enrollment over 1,000 students.

Source: EAB research and analysis.

A Note on the Structure of this Paper

A Layered Approach to Contextualizing Search Trends in Each Region

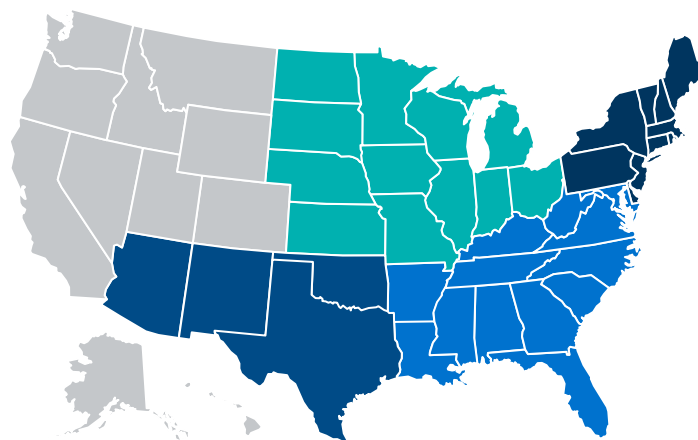
The trends that emerge from the charts and analyses presented in the following sections can help enrollment leaders identify what is going on in their region and market segment in relation to three of the major forces currently affecting enrollment: demographic change, college-going rates, and increased competition. Is your school in a growing market or shrinking market? Is that change due to demographic shifts or student migration? Does this affect certain market segments more than others? The answers to these and other questions can provide insight into where you can look to achieve their enrollment goals, given the successes or challenges revealed in your broader market and region.

The trends and resulting insights will be presented in a series of sections covering each stage of the college search and its corresponding data source:

- 1 ▶ An examination of the **demographic landscape**, tracing changes in the population of 18-year-olds and college-going rates in the recent past (2017 to 2021) and through the next decade (2031). The five-year stretch in the recent past provides us with the demographic context for the last five years of publicly available data on applications and enrollment, while the period from 2021 onward provides context for more current trends emerging from EAB's own inquiry data. This will establish the underlying conditions shaping enrollment trends from region to region.
- 2 ▶ The three sections that follow will present various **application and enrollment trends** across regions and market segments in the recent past (2017 to 2021), covering the most up-to-date data available for all institutions. This will establish the baseline enrollment performance for different institutional types and student preferences toward migration, as well as how they have changed over time. These trends will also be considered in relation to the demographic landscape and its role in any changes observed over time.
- 3 ▶ The fifth and final section charts **current trends in student inquiries** to explore what is shaping the college search process for prospective students in more recent years (2021 to 2023). Although inquiries come earlier in the college search process than applications and enrollment, EAB has direct access to a representative pool of inquiry data through its Audience that are more current than the latest admissions data. This allows us to examine more current trends and how they fit with the less up-to-date trends observed in applications and enrollment in the recent past—and whether new trends are emerging.

Regional Categories

- This paper focuses on region-level trends, following this scheme: *West, Southwest, Midwest, Southeast, Northeast.*



Leveraging Regional Trends for Informed Strategic Enrollment Planning



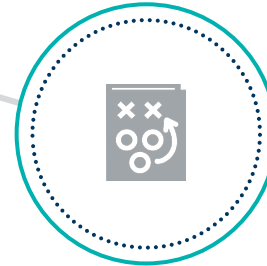
1

Contextualize your institution's enrollment performance across different markets for campus leaders.



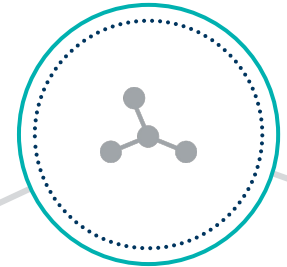
2

Identify trends in past admissions and current inquiries to extrapolate trends going forward.



3

Determine which enrollment forces to focus on when setting strategy.



4

Bring it all together.

Each section of this paper presents an opportunity to cross-reference the underlying demographics trends with admissions outcomes and student preferences in one or more markets and regions. For example, if your school's performance is lagging behind the overall performance in your market, then determining which enrollment forces are at work (e.g., population change, shifting student preferences in mobility or majors) can contextualize your current strategy and reveal what you need to adjust to boost enrollment at your institution.

A note on the granularity of trends presented in this paper:

Although it is possible to examine ever more granular subsets of the data presented in this paper, the intention of this paper is to offer contextualized trends for market comparisons, hypothesis generation, and future lines of inquiry. Therefore, the scale of trends (i.e., geographic region, institutional sector, selectivity, and student demographics) will drill down until there is no further variation between groups to report.





Recent and Future Demographic Trends

Data for the 18-Year-Old Population and College-Going Rate
by State and Region from 2017 to 2031

SECTION

1

Establishing the Demographic Context for Search Trends

To comprehensively analyze the shifts in college search and admissions trends over time and space, it's essential to contextualize them within the broader changes in the college-age population and the college-going rate. These factors significantly influence the outcomes of college enrollment. To that end, this analysis will provide insights into critical questions such as "Which states and regions are already facing population decline, potentially impacting short-term enrollment?" and "Which areas are projected for the most significant decline, posing potential long-term enrollment challenges?"

In pursuit of these answers, this section will delve into historical and projected shifts in the number of high school graduates and college-going rates across states and regions.

By examining both past trends and future projections, this exploration aims to enhance your comprehension of the macro-level influences within your market—revealing their historical and potential future impact on the size of your primary market and its surrounding region.

College-Age Population: How does the college-age population differ across markets and how is it changing?

The impending changes in the college-age population are a widely discussed concern for enrollment offices nationwide. The approaching demographic "cliff" in 2025 poses a threat to many regions, and demographic shifts are already underway in various areas. To gain insights into how this is affecting your market, charting the recent and near-future changes in the number of 18-year-olds—the potential student pool—across regions provides a glimpse of the evolving demand for higher education. By examining these changes, you can grasp historical shifts and anticipate future demand in specific regions, enabling better planning.

College-Going Rate: How does the college-going rate differ across markets and how is it changing?

Another major force shaping enrollment is the college-going rate, which itself is influenced by the preferences of prospective students. These preferences range from personal interests to financial considerations and are mediated by external factors like the health of the job market, all of which shift over time. Shifts in these preferences and external factors over the last decade have led to a declining college-going rate following its all-time peak in 2009. The result has been markets that were already shrinking from population decline made even smaller by these changes in college-going behavior—and even constrained growth for prospect pools in some areas where the population has otherwise continued to grow.

Unfortunately, there are several indications that the pandemic sharply exacerbated this problem, and that it will get worse over the next decade. Analyzing the regional changes in these rates therefore provides a critical complement to the changing college-age population. Taken together, these factors provide a more complete view of the demographic shifts confronting education markets around the country.

What can these tell you that you don't already know about the looming "cliff" from 2025 to 2035?

By presenting both the recent past and the near future, this incremental approach provides a comprehensive understanding of how demographic changes influence enrollment outcomes in the short and medium-term.

The data from 2017 to 2021 allow us to assess recent trends, as well as see how the combined college-age and college-going trends relate to actual application and enrollment outcomes, which will be covered in subsequent sections. This historical comparison grounds our insights with known shifts.

Projections from 2021 to 2031 offer a medium-term view that includes the most recent recruitment cycles and complements the longer-term projections put forth in other research projects (i.e., through 2035). This can help you contextualize strategic decisions, focusing on actionable plans that align with the more immediate changes in the college-age population and college-going rates.

Hot Spots of Population Growth and Decline in the Recent Past

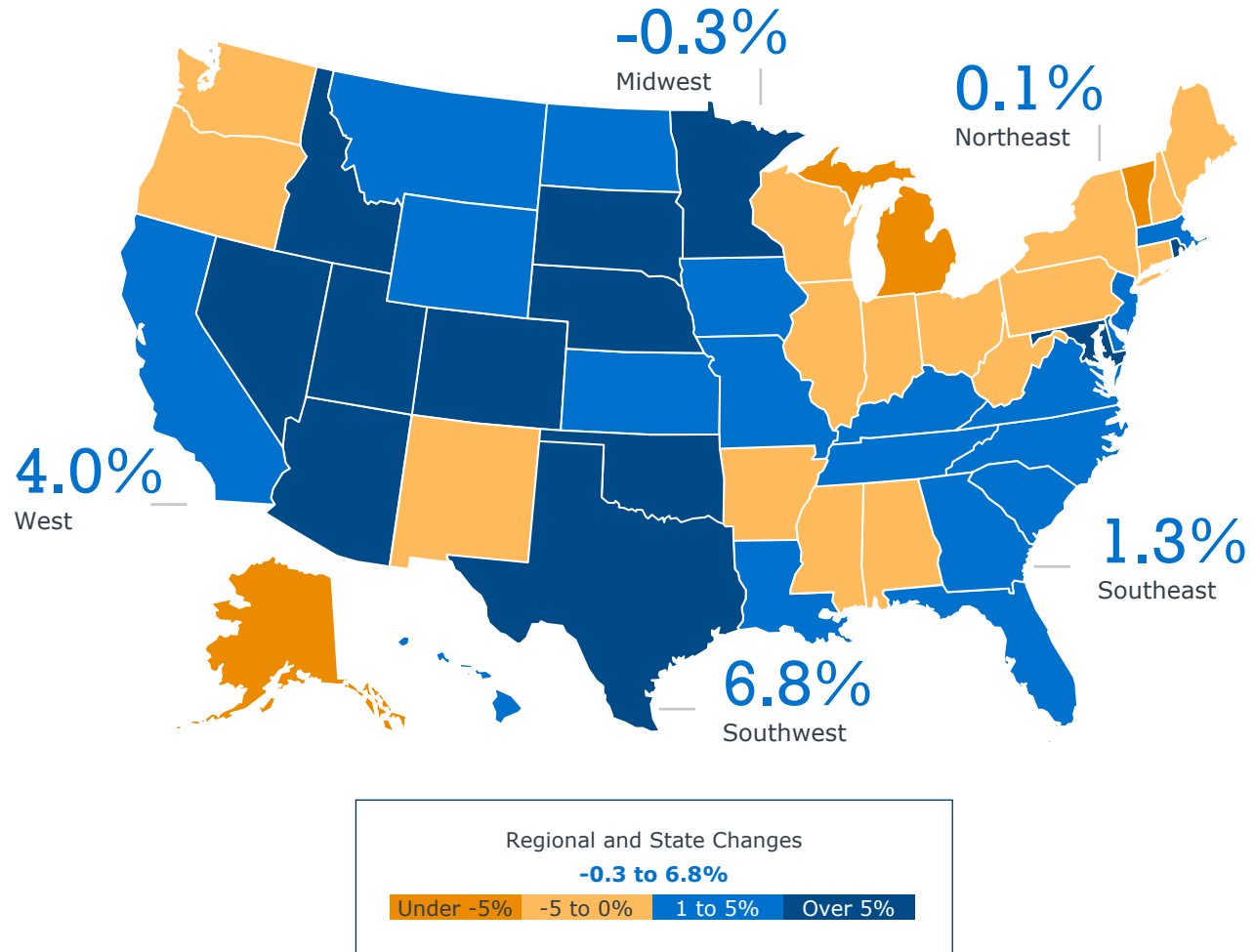
The nationwide population of 18-year-olds increased by 2% from 2017 to 2021. However, this was not evenly distributed across the country. A more granular look at these trends reveals quite a lot of variation in both growth and decline, even in regions where change was largely positive or negative overall.

Of course, the population increased in most states within regions that grew overall (i.e., West, Southwest, and Southeast), with states in the western part of the country experiencing the most growth. There were pockets of decline in each region as well (e.g., OR, NM, AR), indicating that these threats to enrollment have not been limited to the Northeast and Midwest in the leadup to the “cliff”.

The inverse picture is revealed in the Northeast and Midwest, where the population in most states shrank—especially MI and VT. There were also pockets of growth, though (e.g., MA, NJ, MN, MO), showing there were still some places in these shrinking regions where the market is more stable. However, it is clear that these regions were heavily impacted overall, which is corroborated by the fact that 16 colleges in NY and even MA have closed since 2016.

State-by-State Variation in the College-Age Population

Percent Change in the Population of 18-Year-Olds from 2017 to 2021



Source: EAB Analysis of 10th Edition WICHE Knocking at the College Door K12 Data; Higher Ed Dive Team (2023) *A look at trends in college consolidation since 2016.*

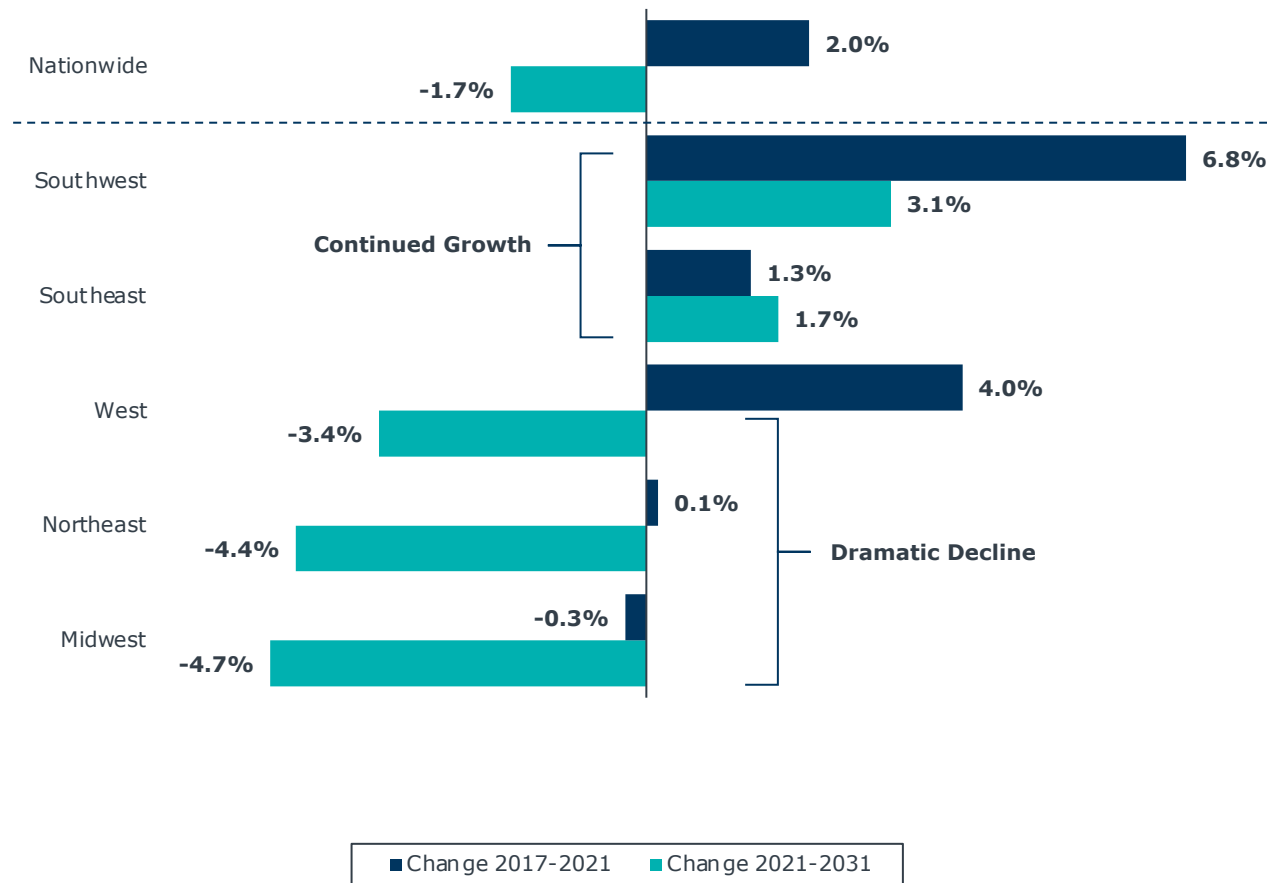
Very Different Visions of the Future from Region to Region

We know some states and regions have already been confronting the demographic “cliff.” This section looks ahead, anchoring changes from the start of this decade¹ and comparing them with those recent trends. Nationwide, projections indicate that there will be a complete reversal of the recent growth in the college-age population—from 2% growth to nearly a 2% decline from 2021 to 2031. This might seem like a modest decline, but we see magnified trends at the regional level that will surely hold significant downstream implications for enrollment.

Where growth had stalled in the Northeast and declined slightly in the Midwest from 2017 to 2021, the population is expected to decline significantly across both regions through 2031. The reversal is even more dramatic in the West, with moderate growth projected to reverse to moderate decline across the region. Moderate growth is expected to persist in the Southwest, if much slower than the growth seen in the last several years. But there is a slight increase expected in growth for the Southeast, which runs contrary to the trends in all other regions.

Over the Edge of the Enrollment Cliff

Projected Change in the Population of 18-Year-Olds from 2021 to 2031



1) Many analyses of these trends typically start in the early 2010s and project changes from that point into the next decade (e.g., Grawe 2021). In contrast, this report separates documented changes from the past decade and projects forward from the beginning of this decade.

Source: EAB Analysis of 10th Edition WICHE Knocking at the College Door K12 Data.

Hot Spots of Population Growth and Decline in the Future

The future looks very different from state to state—even in regions where large overall decline is projected.

States in the West stand out in this regard, where many will grow, but the magnitude of the projected decline in populous CA is substantial enough to weigh down the region’s growth in aggregate. There is high growth expected in many states throughout the region, though (e.g., WA, NV, UT).

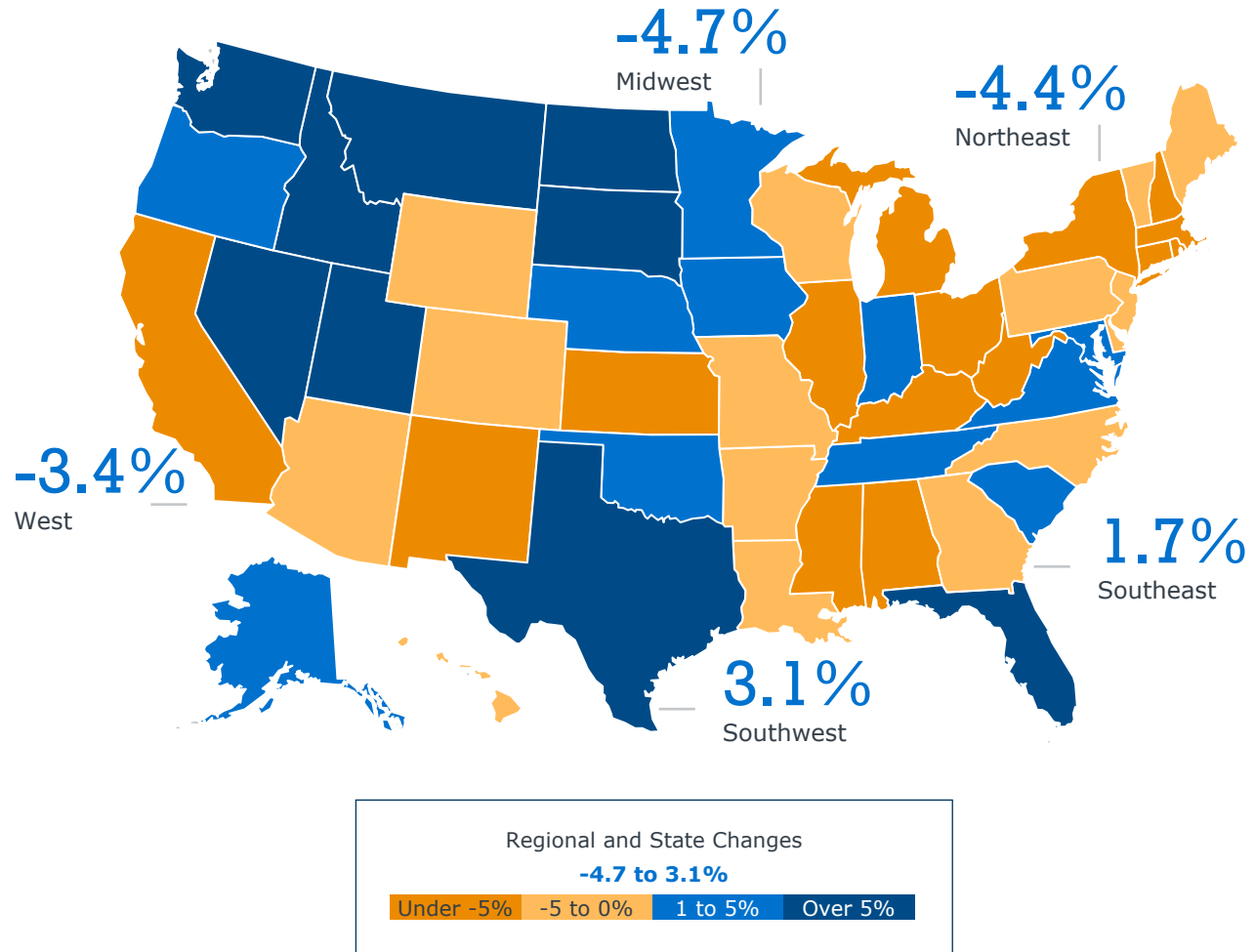
The Southwest and Southeast regions demonstrate the inverse of this trend, where it appears that Texas and Florida form the core of the growth expected in their respective regions through the next decade. Meanwhile, while they contain other pockets of growth, most other states are expected to shrink—some quite dramatically (e.g., NM, MS, KY).

A mixed bag of state-by-state change characterizes the Midwest’s future. Like in the West, the western parts of the Midwest (e.g., MN, ND, SD) are expected to grow, but not enough in aggregate to offset the steep declines in MI, IL, OH, and KS.

Most dramatically, the population is expected to decline across all the Northeast, varying only by degrees.

State-by-State Variation in the College-Age Population

Projected Change in the Population of 18-Year-Olds from 2021 to 2031



Source: EAB Analysis of 10th Edition WICHE Knocking at the College Door K12 Data.

College-Going Rates Are Falling in Most Places

Tracking the college-going rate provides insights into where and to what extent there are shifts in the choices students make after completing high school. While analysis by Dr. Nathan Grawe is more well known for highlighting upcoming demographic decline, his work also helps identify how the nation’s shifting demographics could affect college-going rates.

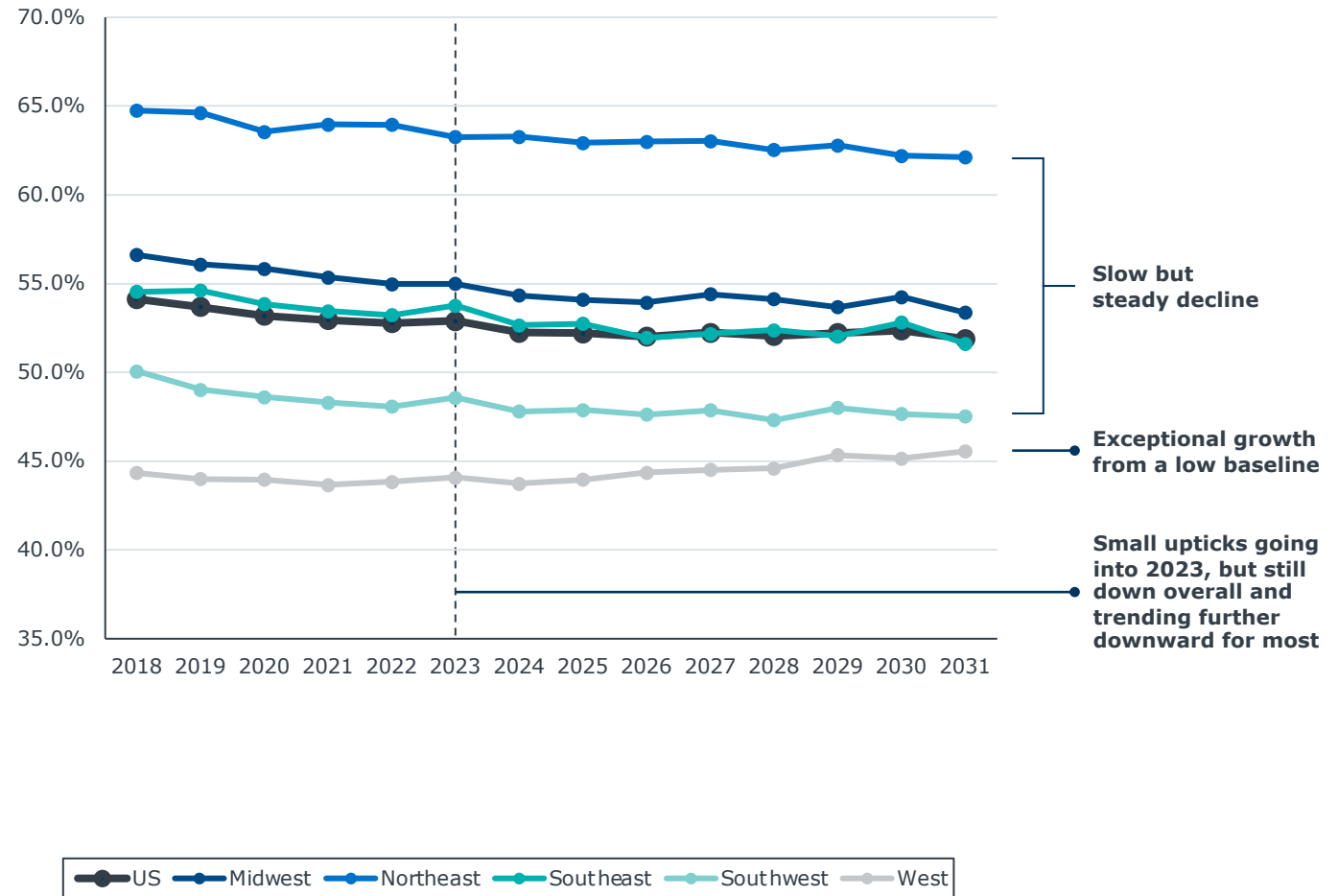
Nationwide, demographic shifts are likely to reduce the proportion of high school graduates immediately going into a 4-year only modestly, from 54% in 2018 to 52% in 2031. When broken out by region, though, the relative rates and changes differ greatly.

The Northeast stands out with an overall high four-year college-going rate, although it is expected to drop several points by 2031. On the other end, the West started from a much lower baseline rate in 2018 but is the only region projected to see an increase into the 2030s.

It is worth noting that these projections only estimate shifts in college-going due to changes in demographics, and don’t take into account more recent trends in the college-going rate.

Regional Variation in the College-Going Rate

Projected¹ Change in the College-Going Rate for 4-Year Institutions from 2018 to 2031



1) Attend any four-year post-secondary institution after high school graduation.

Source: Grawe, Nathan, *The Agile College* (HEDI data file).

Key Takeaways from Demographic Trends

Clear and Expected Overarching Trajectories, Mixed with Significant Regional Differences

These demographic trends, taken together, provide a more complete view of the demographic shifts confronting education markets around the country. And while the highest-level and regional trends may not come as a surprise, the devil is clearly in the details given the amount of variation within and between regions. These insights will inform and contextualize the trends uncovered in the following sections, all of which will combine to present a detailed picture of college search trends across space and time.



Documented Regional Decline in the College-Age Population Amid National Growth

The college-age population has already been slowing significantly (or declining) in the Midwest and Northeast for several years, even amid continued nationwide growth. That this occurred almost a decade before the onset of the demographic “cliff” underlines the need for nuanced strategies to address these challenges.



Projected Regional Growth in the College-Age Population Amid National Decline

Despite an expected overall decrease in the college-age population over the next decade, the Southeast and Southwest are poised for continued growth—even increasing growth for the Southeast. This further points to the necessity of considering regional dynamics when examining enrollment trends.



Continual College-Going Rate Decline

College-going rates have faced a general decline, which poses a substantial challenge for institutions. Apart from the West, this decline is expected to persist, further shrinking already declining prospect pools—or perhaps undercutting the modest growth projected in other regions. This indicates the importance of adapting to the changing student preferences and needs that underlie the college-going rate.



Notable Exceptions to Each of these Trends

Just as is the case when drilling down from the national trends, there exist intriguing outliers within the regional trends. Whether they are pockets of growth in a region that is otherwise shrinking or the reverse, these exceptions remind us that gaining a comprehensive grasp of these shifts—and capitalizing on them—requires recognizing subtle variations.



Recent Application Trends

Application Volume Data for First-Time Undergraduates at 4-Year Institutions by State, Region, Sector, Selectivity, and Gender from 2017 to 2021

SECTION

2

Exploring Trends in Applications and Its Significance

Applications serve as a pivotal stage within the broader college search process that prospective students undertake. They can represent the culmination of a student's efforts to identify suitable institutions and make informed decisions about their academic future. With the demographic context in place, we can now examine the application trends across regions and market segments in the recent past, relating them back to the demographic landscape and its role in the changes observed over time.

Given that the college-age population and college-going rates are expected to decline in most markets—and already have in many cases—competition is necessarily increasing between schools to fill their classes from this shrinking pool of college-goers. Application trends can help you trace the contours of that competitive landscape in your market, as well as how it compares with other markets across the country.

E.g., which regions and institutional segments attracted the most applications? Were these trends driven by demographics or other factors like changing applicant preferences? This sets a baseline application performance and trajectory going into upcoming demographic shifts. Understanding these patterns can help your school strategically move forward.

Application Volume's Importance: How does application volume drive enrollment growth?

Many colleges have seen an increase in applications in recent years, even as the number of college-bound students has decreased. This, along with persistent staffing issues within admissions teams, has led some enrollment leaders to question whether it is worth allocating scarce resources to drive further application growth. By examining historical data and recent trends, we'll reveal how fluctuations in application volume directly impact an institution's ability to meet its enrollment goals.

Regional Application Trends: How has application volume differed from region to region?

Charting the changes in application volume from 2017 to 2021 for 4-year institutions across a variety of geographic areas, including national, regional, and state levels, will show more precisely how applications are trending from place to place—as well as any disparities that exist between them. This examination not only offers insights into the general trajectory of applications but also highlights regions characterized by substantial changes or distinctive patterns. This scale equips us to contextualize the findings and delve deeper into the underlying factors driving these shifts, including influences like demographic changes, evolving student inclinations, and shifts in institutional marketing approaches.

Demographic Factors: Do demographic changes explain changes in application volume?

By assessing how the combined shifts in the college-age population and college-going rate coincide with shifts in application numbers, we can gain insights into the extent to which demographics play a role in shaping application trends. If a relationship emerges between demographic shifts and application trends, it could suggest that institutions should closely align their recruitment and marketing strategies with the changing demographics to optimize their appeal to the evolving student landscape. Conversely, if demographic changes do not fully account for application trends, other factors like evolving student preferences or institutional initiatives (e.g., in-state tuition rates for out-of-state students) may be playing a more substantial role.

Market Application Trends: How has application volume differed by sector, selectivity, and student gender?

By dissecting the application trends across various institutional sectors (public and private), degrees of selectivity (selective and non-selective), and student gender (women and men), we'll obtain a nuanced view of which types of institutions are experiencing increased or decreased interest among different types of prospective students. Examining the differential impact of these variables on application volume offers insight into how these factors collectively contribute to shaping the application landscape in different markets.

If You Aren't Growing Applications, You're Losing Enrollment

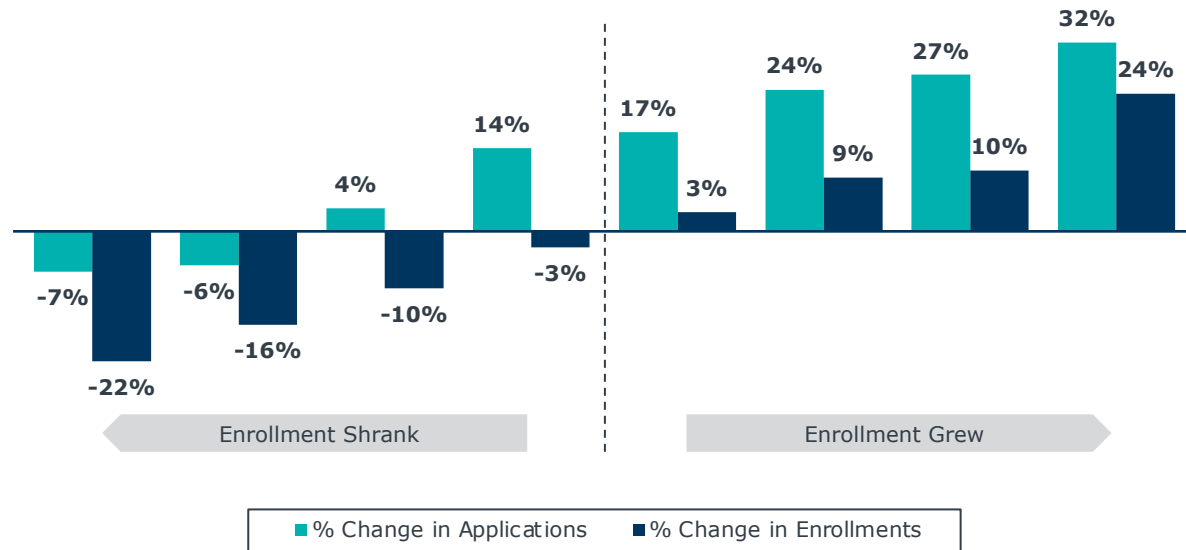
Why focus on variation in application volume? Many colleges have seen an increase in applications in recent years, even as the number of college-bound students has decreased. This, along with persistent staffing issues within admissions teams, has led some enrollment leaders to question whether it is worth allocating scarce resources to drive further application growth.

Our research indicates that application growth is essential not just for increasing enrollment but for preventing enrollment losses as well. Schools that grew enrollment from 2017 to 2021 largely did so via outsized application growth. In other words, colleges that drive increased application activity are likely to enroll more students. This is the case across states, sectors, and schools of differing selectivity¹.

Given the apparent effectiveness of a volume-based strategy, this approach becomes even more important in this era of increasing non-consumption and shrinking college-age populations. And while application volume has gone up overall for four-year schools across the country, there is a great deal of variation from market to market.

Application Volume Drives Enrollment Growth

Change in Application Volume for 4-Year Institutions from 2017 to 2021 by Enrollment Growth¹
n = 671



1) Enrollment growth and decline are split into quartiles.
2) For more on this, see our blog post: "What does application growth mean for enrollment outcomes? Findings from a new IPEDS analysis" at EAB.com.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Applications Were Up in Most Places, If Not Everywhere or by as Much

Examining the change in application volume from region to region in the recent past shows that applications were up throughout the country. They grew in some places more than others, though, and there were important exceptions.

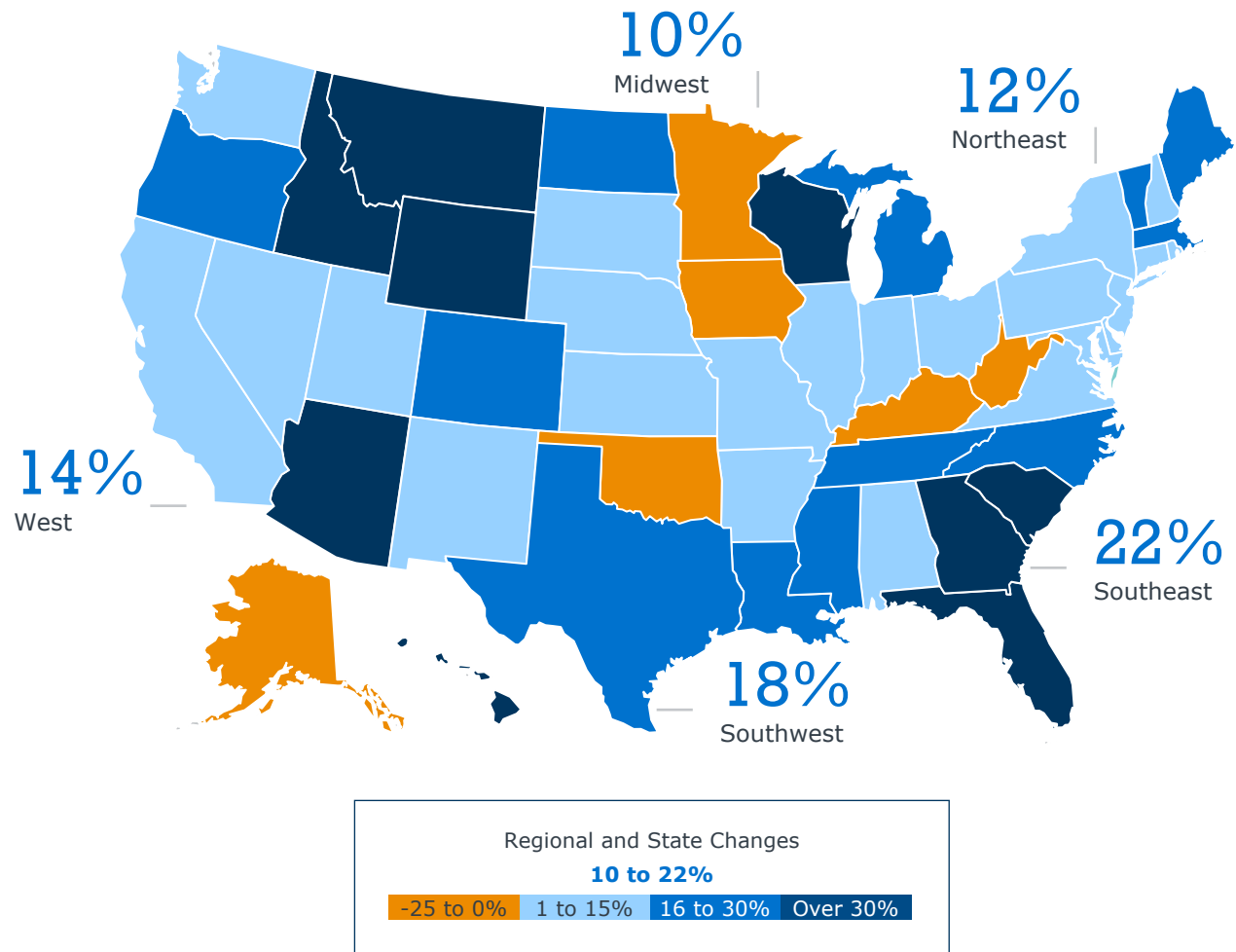
Growth was highest in the Southeast—more than twice as high, overall, as the Midwest. This was driven largely by FL, GA, and SC. Growth was similarly high in the Southwest, driven by high growth in AZ, which, together with FL, had the most application growth. Even these high growth regions had pockets of decline, though (e.g., KY, OK).

The West ranked next in growth, with states like HI and ID growing the most. The only state where volume shrank was AK, but growth in CA was below average. This is important because below-average application growth led to declines in enrollment over this period, as highlighted in the previous slide.

Growth was lower overall for schools in the Northeast, especially in NY, if not shrinking anywhere. Most notable perhaps were the declines in parts of the Midwest (i.e., IA and MN), which dragged down the region's overall application growth to the lowest of all regions.

State-by-State Variation in College Application Volume

Percent Change in the Number of Applications for 4-Year Institutions from 2017 to 2021



Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Do Demographic Shifts Explain the Changes in Application Volume?

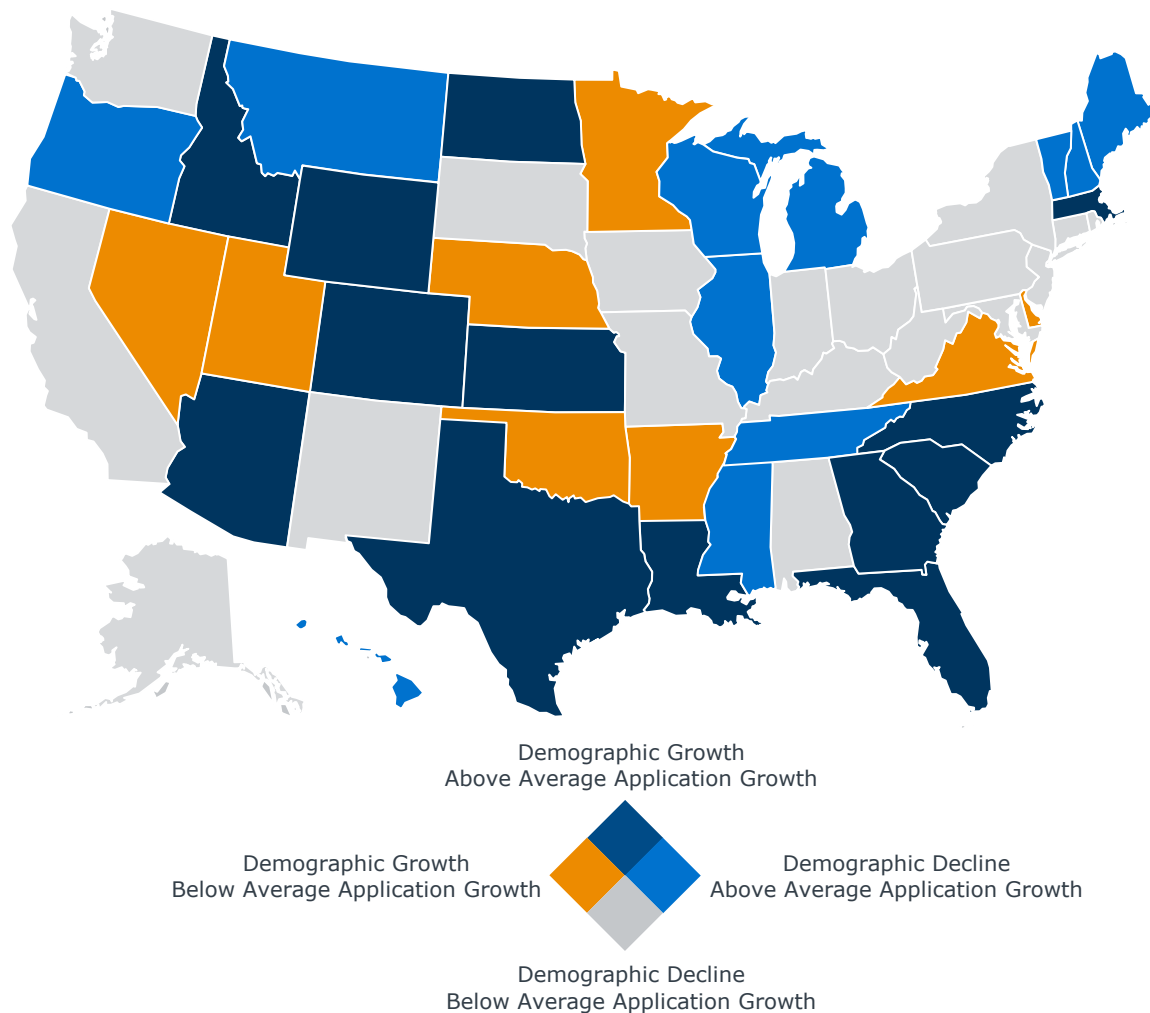
When mapping the intersection of demographic and application trends, we observe significant overlap in the direction of change (i.e., in 62% of states)—suggestive of a strong demographic role for applications.

States in gray saw a net decrease in prospective student populations and below-average application growth, primarily concentrated in a swath from Indiana to Rhode Island—expected given the early declines in these regions. Conversely, states in dark blue demonstrated both above-average application growth and increases in prospective students, with many states fitting this pattern (especially coastal states in the Southeast).

However, some exceptions exist. States in orange saw below-average application growth despite a growing population. Additionally, evidence suggests that schools in shrinking areas can still attract above-average application growth from their primary market or further afield. This phenomenon is seen in several states (light blue) across the country, particularly in parts of the Midwest and Northeast. All of which indicate that demographics aren't destiny—market competition has a large effect in shrinking applicant pools.

Demographics Are a Major Force Influencing Application Trends, but Not the Only One

The Overlap Between Changes in Applications and Demographics¹ from 2017 to 2021



1) The combined change in the college-age population and the college-going rate.

Sources: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021; 10th Edition WICHE Knocking at the College Door K12 Data; Grawe, Nathan, *The Agile College* (HEDI data file).

Public Institutions Outpaced Private Institutions in All Regions

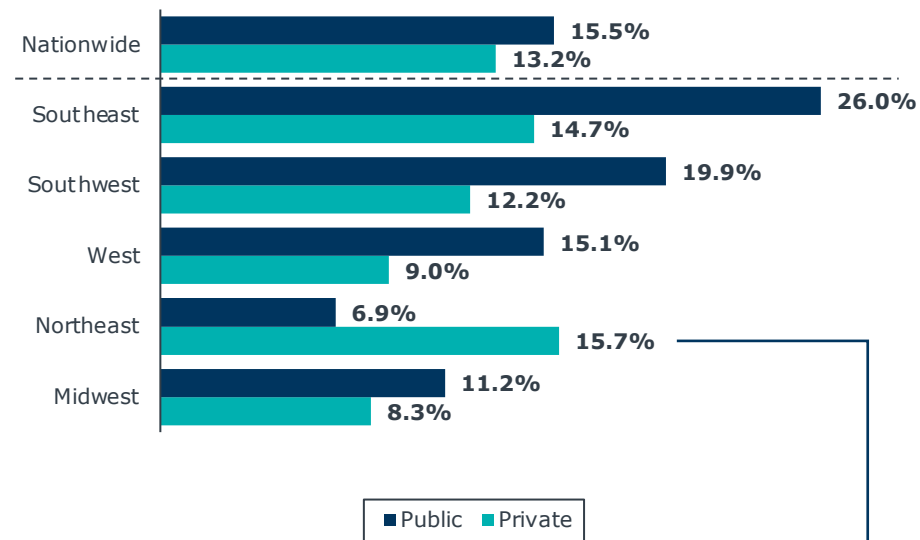
If demographics aren't destiny, what else is driving the large and variable changes in application volume from 2017 to 2021? When we examine the differences in application growth between private and public sector institutions nationwide, we see that public institutions modestly—but disproportionately—outpaced private institutions during this period.

When we dig into the differences in performance at the regional level, though, that modest 2% difference between Public and Private institutions widens dramatically in most cases. Public institutions in the Southeast, Southwest and West drastically outstripped application growth in private institutions. This might demonstrate the competitive strength of public systems in these regions (e.g., the University of Texas, the University of California).

Conversely, private schools in the Northeast defied this trend, with more than double the application growth of public schools in that region. This highlights the unique strength and concentration of private institutions across this region. However, how much of this is driven by the selective schools located there?

Regional and Sectoral Variation in College Application Volume

Percent Change in the Number of Applications for 4-Year Institutions from 2017 to 2021



Private institutions in the Northeast were a significant outlier relative to the performance of private institutions elsewhere

Huge Regional Variation in Application Growth by Selectivity

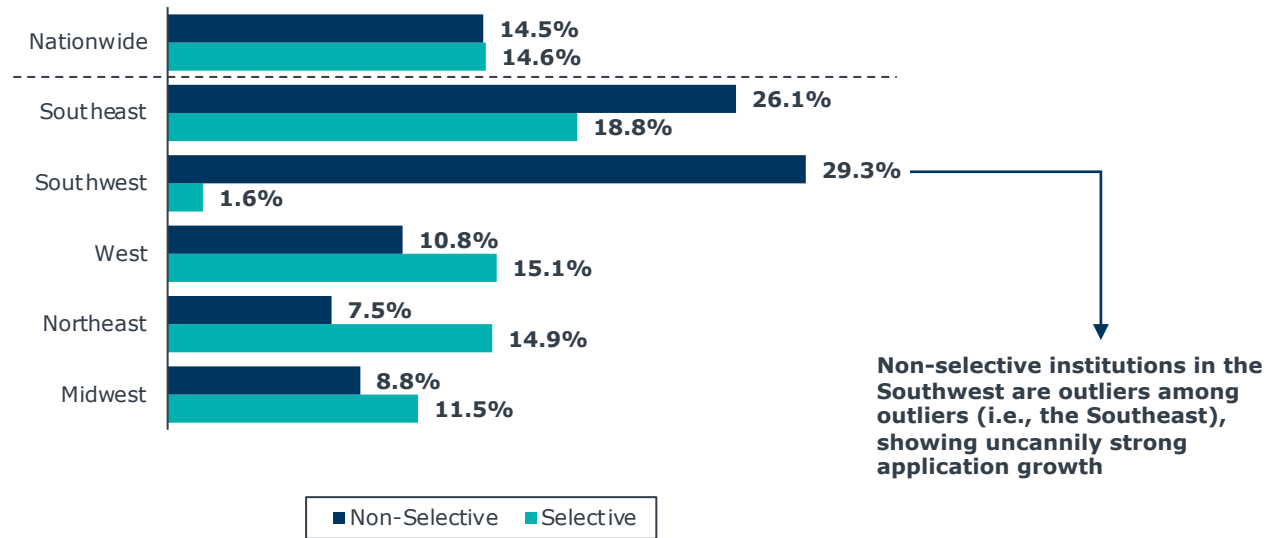
When we look nationwide at the variation in application growth between selective¹ and non-selective schools², we see market segments that appear to be on par with one another—hovering between 14 and 15% application growth. However, that belies enormous regional variation.

The Midwest, Northeast, and West all show varying degrees of selective schools modestly outpacing non-selective ones in application growth. This follows a simple logic: schools that already attract large applicant pools will continue to do so at a higher rate. It further suggests that the exceptional growth of the private sector in the Northeast, highlighted on the previous page, might have relied heavily upon the exceptional nature of the selective schools there.

The Southeast and Southwest evince quite different trends, though. In both regions, non-selective schools generally outpaced the application growth of selective schools. The Southwest is remarkable for just how large this gap is—almost all the high application growth in that region comes from non-selective schools (both public and private).

Regional and Selectivity Variation in College Application Volume

Percent Change in the Number of Applications for 4-Year Institutions from 2017 to 2021



Diving Deeper: Private-Selective School Dominance in the Northeast

23.1%
Application growth among **private** and **selective** schools in the Northeast

1.2%
Application growth among **private** and **non-selective** schools in the Northeast

Private and **selective** schools in the Northeast drove overall growth

1) Acceptance rates below 65% in 2017.
2) Acceptance rates at or above 65% in 2017.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Gaps in Enrollment by Gender Emerging in Most Regions

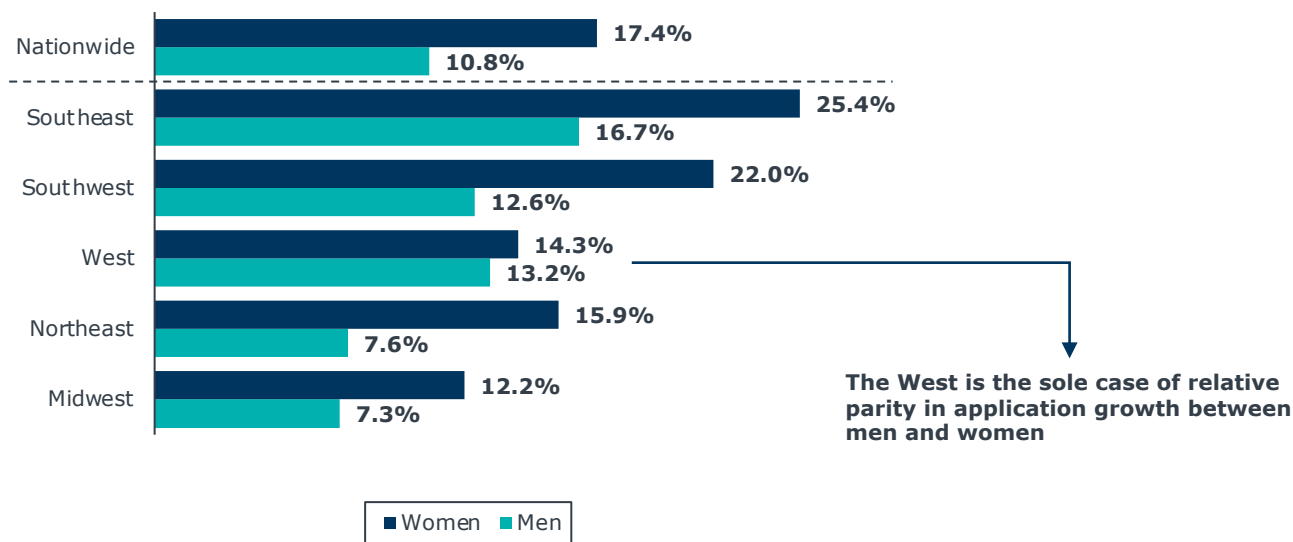
The variation in application trends extends beyond institutional sector and selectivity. As of fall 2021, women represent approximately 58% of U.S. college undergraduates, with a consistent trend of more women enrolling in higher education than men each year. While overall college enrollment has decreased in recent years, the drop is particularly sharp among men, leading some colleges to increase efforts to better attract and retain male students throughout their college journey.

From 2017 to 2021, we see this story play out nationwide and from region to region. Applications grew among both genders, but much more so among women across the country. Even taking these differences into account, men were much less likely to apply to schools in the Northeast and the Midwest—increasing at less than half the rate of women in the former case. This was even starker for non-selective schools in this region.

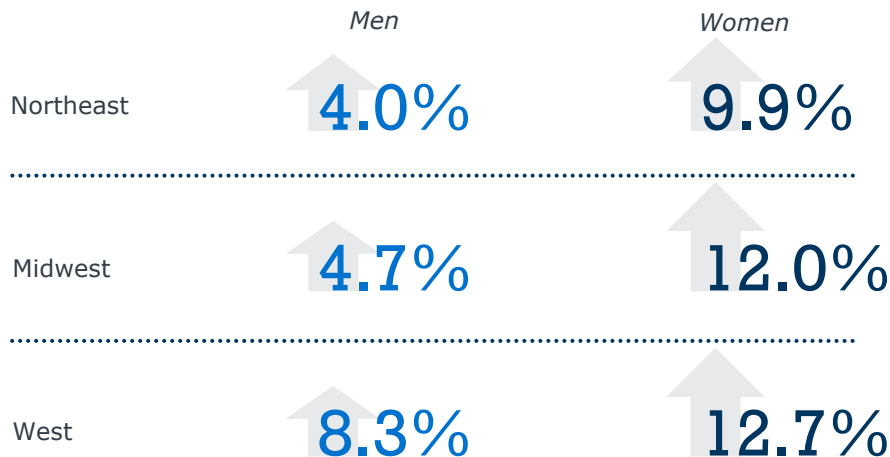
In the West there appeared to be more parity, though digging deeper reveals that this was only the case for applications to selective schools—the gulf widened significantly between men and women applying to non-selective schools.

Regional and Gender¹ Variation in College Application Volume

Percent Change in the Number of Applications for 4-Year Institutions from 2017 to 2021



Change in Applications to Non-Selective² Schools



1) IPEDS data do not include non-binary gender.
2) Acceptance rates at or above 65% in 2017.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Key Takeaways from Application Trends

Clear and Expected Overarching Trajectories, Mixed with Significant Regional and Market Differences

The examination of application trends underscores their pivotal role in shaping enrollment growth and competitive positioning. These collective insights show that this new landscape is not simply one of uniform application growth, offering guidance for adaptive success within this evolving landscape. These findings will also be an important reference point for future sections, contributing to a comprehensive understanding of college search trends across several dimensions.



Application Growth as a Competitive Advantage

The analysis underscores that institutions that greatly increased application growth from 2017 to 2021 have experienced enrollment growth as well. This points to the pivotal role of application volume not only in boosting enrollment but also in preventing enrollment losses. Institutions should recognize that driving application growth remains a crucial strategy, especially amid increasing non-consumption and declining college-age populations.



Applications Were Up in Most Places—but Not by the Same Amount nor in All Places

Regional analysis reveals diverse trends in application growth across the country. While applications grew overall for four-year schools, the scale of growth varied significantly from place to place. These regional disparities underscore the importance of understanding local dynamics and tailoring strategies accordingly.



Demographics Impact Application Growth—but Aren't Destiny

The intersection of demographic and application trends demonstrates a clear connection between the two. States with growing prospective student populations and above-average application growth (or the reverse) overlap significantly. However, exceptions exist, indicating that market competition can significantly influence application growth even in shrinking applicant pools, and that that even continued population growth within one's home market isn't enough by itself.



Highly Localized Variations in Application Growth by Sector, Segment, and Gender

The variations in application growth between public and private institutions, as well as selective and non-selective schools, are noteworthy. Regional patterns show how public institutions have outpaced private ones in most regions, while in others it differs dramatically whether selective or non-selective schools have led application growth. Additionally, gender differences in application rates and preferences are apparent, revealing important and highly localized trends that institutions need to consider for effective recruitment and retention strategies.



Recent Enrollment Trends

Enrollment Data for First-Time Undergraduates at 4-Year Institutions
by State, Region, Sector, Selectivity, and Gender from 2017 to 2021

SECTION

3

Exploring Trends in Enrollment and Their Significance

After examining how the college-going population will change and recent trends in applications, our focus shifts to the endpoint for students' college search process and your ultimate goal—enrollment. This section delves into changes in enrollment performance for different institutions across various regions.

Although applications are up in most places—and application growth drives enrollment growth for institutions—the shrinking population pool over the next decade intensifies competition for enrollees. Charting recent enrollment performance (2017 to 2021) and contextualizing it with demographic and application trends offers valuable insights into the competitive landscape of your school and how enrollment is evolving in other markets.

Which regions attract the most enrollees? To what extent is this influenced by local demographics? Do specific types of institutions attract more students in different places? Understanding which regions, institution types, and majors are most appealing to enrollees, while considering the impact of changing demographics and application patterns, empowers schools to position themselves effectively in this growing competition for students—the force that is shaping enrollment above all others.

Regional Enrollment Trends: How has enrollment changed from region to region?

While application volumes show an upward trend in various markets, enrollment figures have seen declines across many regions over the past decade. In a manner similar to the approach taken for application volumes, scrutinizing the shifts in enrollment outcomes across diverse geographic scales—spanning national, regional, and state levels—provides a comprehensive understanding of the nuanced enrollment trends across different locales. This analytical lens not only sheds light on the overall trajectory of enrollments, which stem from application patterns, but also reveals regions marked by noteworthy shifts or distinctive dynamics. This expansive perspective enables contextualization of findings and an in-depth exploration of the driving forces behind these changes, encompassing factors such as evolving demographics, changing student preferences, and shifts in institutional outreach strategies.

Demographic Factors: Do demographic changes explain changes in enrollment?

In a manner akin to the assessment of application volumes, probing how changes in the combined college-age population and college-going rates align with enrollment shifts can unveil the role of demographics in shaping enrollment patterns. Identifying connections between demographic changes and enrollment trends can signal the need for institutions to tailor their recruitment strategies in alignment with evolving demographic dynamics, optimizing their appeal to the shifting student landscape. Conversely, if demographic shifts do not fully account for enrollment changes, this could point towards the influence of other factors like evolving student inclinations or institutional initiatives (e.g., enticing out-of-state students with in-state tuition rates).

Market Enrollment Trends: How has enrollment differed by sector, selectivity, and student gender?

Just as with application trends, delving into enrollment trends across institutional sectors (public and private), levels of selectivity (selective and non-selective), and student gender (women and men) offers a more precise perspective on the changing appeal of different institution types to potential students. Analyzing the differential impact of these variables on enrollment reveals how these multifaceted factors contribute to emergent enrollment trends, clarifying the interplay between institutional characteristics and the preferences of different student segments.

Enrollment Down in Most Places—but Not Everywhere nor By as Much

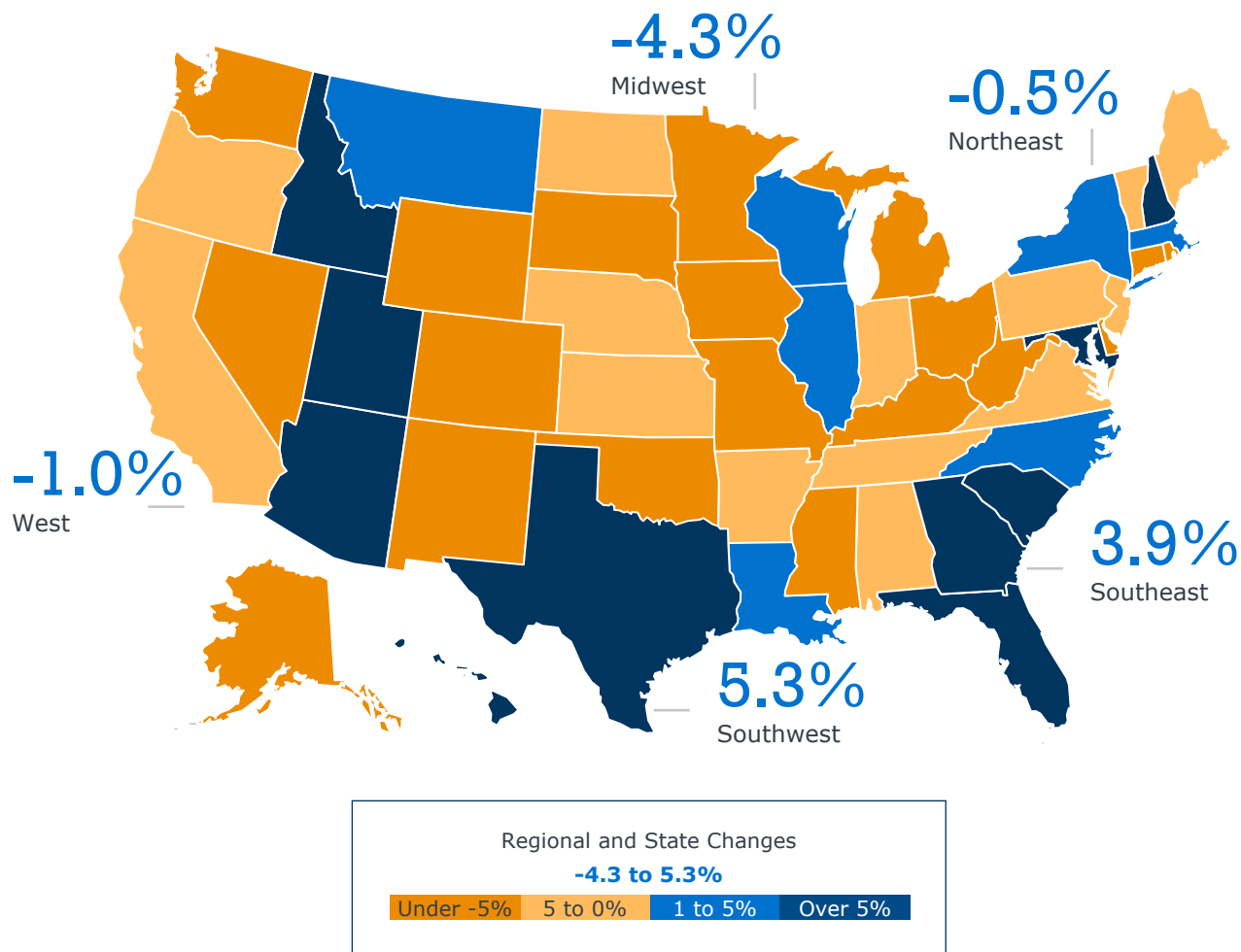
Whereas application volume had grown by 14.5% nationwide, the picture shifts dramatically when it comes to enrollment in the recent past, growing only by 0.2%. Breaking enrollment trends down by region and state reveals that most areas lost enrollment, but a smattering of states in all regions did see overall enrollment growth.

The states that saw the largest increases (e.g., AZ, FL, TX, GA, SC) were mostly in the Southeast and Southwest regions, which grew overall. These high-growth states are correlated with the largest increases in application volume as well. In fact, most of the 16 states that grew enrollment also had above average application volume—validating the need for high application growth. NY and IL were the only exceptions, with below average growth in applications.

While those southern regions reaped the most growth, each also had broad swaths of decline. Conversely, the West and Northeast had few spots of growth. The Midwest saw the most precipitous drops in enrollment, though, corresponding with the lowest application growth. We will next examine whether this is in line with demographic changes over the same period.

State-by-State Variation in College Enrollment Volume

Percent Change in Enrollment for 4-Year Institutions from 2017 to 2021



Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Do Demographic Shifts Explain Changes in Enrollment?

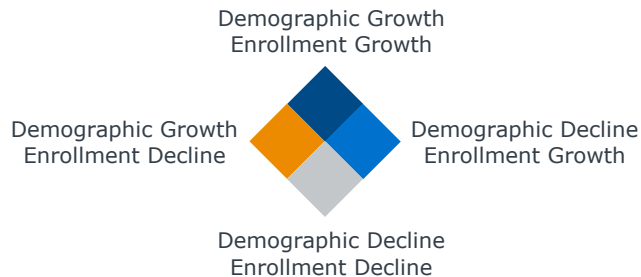
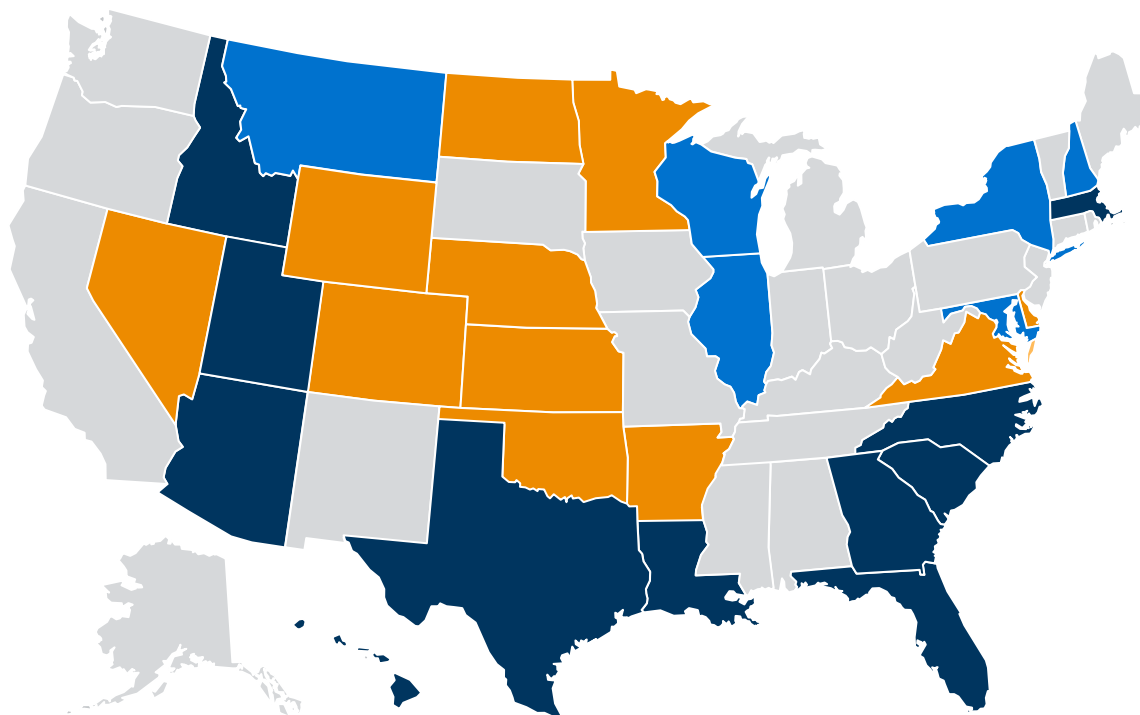
As with applications, there was a lot of overlap between the size and direction of changes in enrollment and demographics (i.e., in 62% of states). This was the case in much of the Southeast, where many states had demographic increases along with enrollment growth (in dark blue), as well as much of the Midwest, where many states saw demographic declines along with shrinking enrollment (in gray). It is likely no coincidence that so many states exhibited this trend, but demographic shifts do not tell the whole story.

As was the case with applications, there are some states where population growth alone within one’s home market wasn’t enough, including many states throughout the Midwest and West (in orange, e.g., CO, NV, NE, KS, MN).

More importantly, there’s also evidence that schools in shrinking areas can still attract above average enrollment growth (blue), perhaps attracting applicants and enrollees from further abroad. Several states around the country exhibit this trend (e.g., WI, IL, NY), further indicating that demographics aren’t destiny. Schools in shrinking markets can overcome structural challenges through improved competitiveness.

Demographics Are a Major Force Influencing Enrollment Trends, but Not the Only One

The Overlap Between Changes in Enrollment and Demographics¹ from 2017 to 2021



1) The combined change in the college-age population and the college-going rate.

Sources: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021; 10th Edition WICHE Knocking at the College Door K12 Data; Grawe, Nathan, *The Agile College* (HEDI data file).

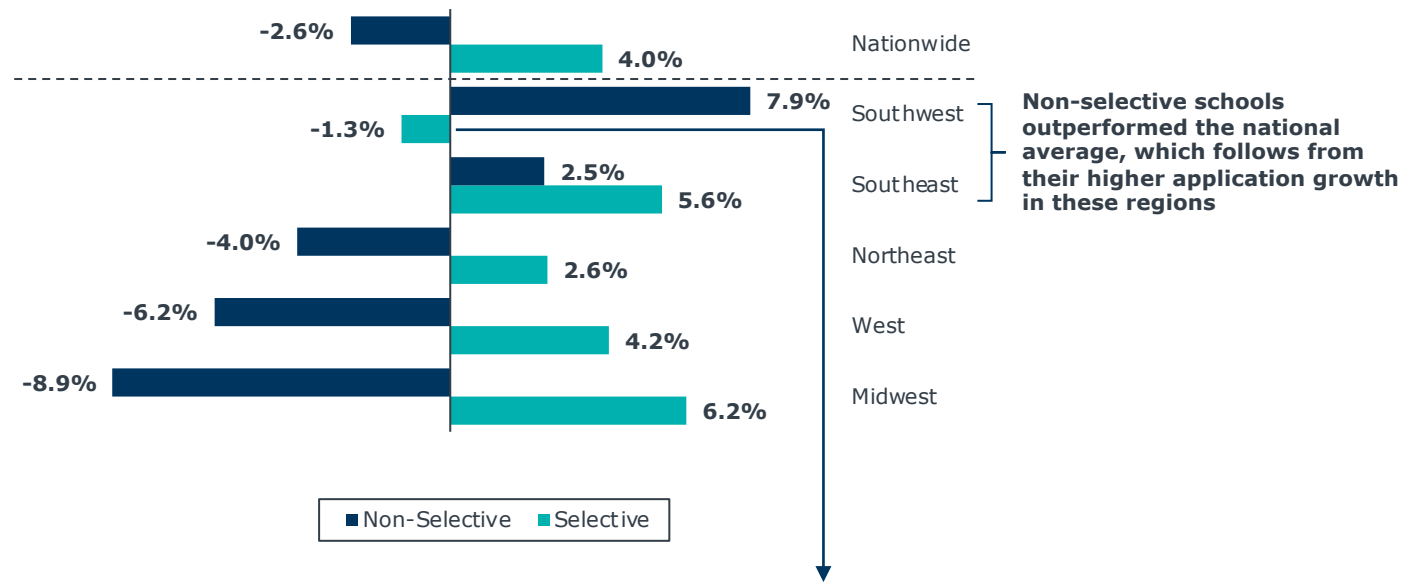
Selective Schools Are Driving Enrollment Growth—but Not Everywhere

Digging deeper into these enrollment trends, we see little divergence between public and private school enrollment from region to region. However, there is an enormous divergence when we break down the trends by selectivity, which vary wildly between regions. Nationwide, selective¹ schools overall grew enrollment by 4%, but it shrank by 2.6% for non-selective² schools. This divergence—with selective schools outperforming non-selective ones—existed across four of the five regions, if to varying extents. The greatest divergence was in the Midwest, where non-selective schools shrank overall by 8.9%, but selective schools grew by 6.2%.

It looks very different in the other regions. In the Southeast, selective schools still outperformed, but both selective and non-selective schools modestly grew enrollment. Digging into sectoral differences reveals that this growth was largely driven by *private* non-selective and *public* selective schools. In the Southwest, the relationship flips: non-selective schools grew their enrollment. But while selective schools overall lost some enrollment, that was more limited to *public* selective schools. Private selective schools still grew modestly.

Regional and Selectivity Variation in College Enrollment

Percent Change in Enrollment for 4-Year Institutions from 2017 to 2021



Non-selective schools outperformed the national average, which follows from their higher application growth in these regions

Selective schools in the Southwest uniquely underperformed relative to all other regions

9.4% & 8.4%

Particularly High Growth for Private Non-Selective & Public Selective Schools in the Southeast

4.9% vs -4.7%

Large Divergence Between Private Selective & Public Selective Schools in the Southwest

1) Acceptance rates below 65% in 2017.
2) Acceptance rates at or above 65% in 2017.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

A Growing Gap in Enrollment Between Men and Women

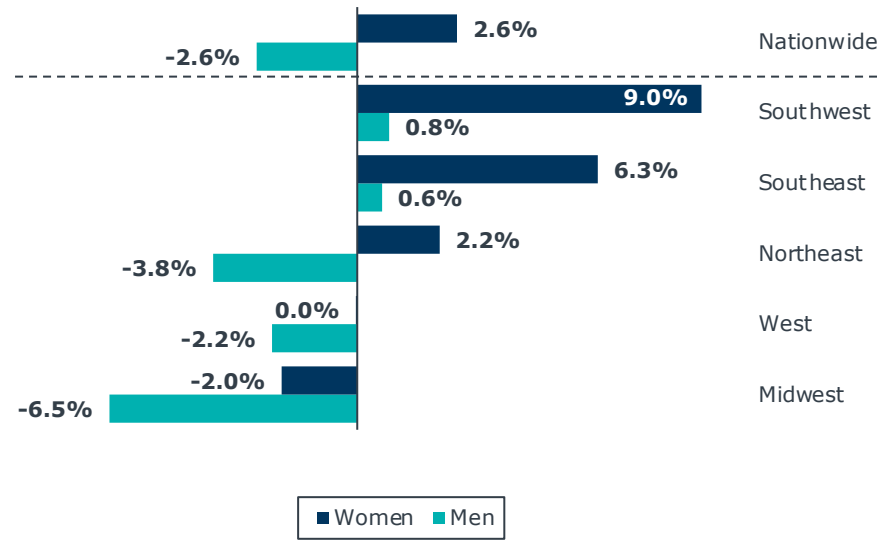
There was another divergence between men and women, but with the population of enrolled women growing and men shrinking. This is quite remarkable given the fact that the number of applications from men had increased, if not quite as much as the number of applications from women.

We also see large divergences between men and women in each region, though by how much varies. Overall enrollment growth was highest in the Southwest, but that was driven by an enormous 9% growth among women and only 0.8% growth among men—though that was the highest growth among men in any region. The story is similar in the Southeast, while the Northeast mirrors the positive-negative divergence between men and women nationwide. In the West, enrollment was flat for women and shrank modestly for men, but enrollment shrank for both groups in the Midwest over this period, if still more so for men than women.

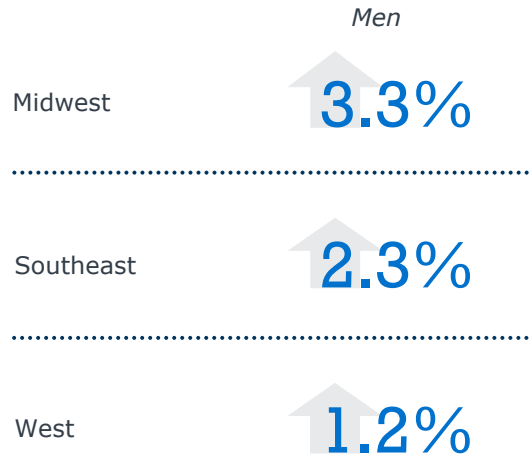
The trends are broadly similar by sector and selectivity, if with some deviation, such as higher enrollment growth among men for selective schools in the Midwest, Southeast, and West, as well as non-selective schools in the Southwest.

Regional and Gender Variation in College Enrollment

Percent Change in Enrollment for 4-Year Institutions from 2017 to 2021



Change in Applications to Selective¹ Schools



1) Acceptance rates below 65% in 2017.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Key Takeaways from Enrollment Trends

Clear and Expected Overarching Trajectories, Mixed with Significant Regional and Market Differences

These insights illuminate the dynamic interplay between enrollment growth, shifting demographics, and institutional characteristics. While overarching trends may align with expectations, the nuanced variations within and between regions reveal the complexity of the enrollment side of the student journey. These findings lay the foundation for the subsequent sections, offering a richer understanding of college search trends that build upon each other to present a comprehensive view across different contexts and time frames.



Enrollments Are Down Overall, but There Are Different Models for Growth

While application volumes have increased significantly, enrollment growth has been relatively minimal, reinforcing the fact that efforts to drive application growth are crucial not only for enrollment expansion but also for preventing enrollment losses in this shifting environment. Enrollment trends vary widely across regions, but areas of higher application growth, like the Southeast and Southwest regions, have experienced the highest enrollment growth, with states like AZ, FL, TX, and GA leading in both application and enrollment increases.



A Complex Interplay of Demographics and Enrollment

There is substantial overlap between demographic changes and enrollment shifts, particularly in the Southeast (growth) and Midwest (decline), which likely points to the important role of demographics in driving enrollment changes. However, exceptions exist where institutions in shrinking areas attracted above-average enrollment growth and vice versa, highlighting the significance of competing for market share in the current environment.



Selective Advantage in the Enrollment Landscape, Except in the Southwest

Across regions, selective schools unsurprisingly tended to outperform non-selective schools in enrollment growth. This is most pronounced in the Midwest, where non-selective schools have faced substantial enrollment declines while selective schools have still grown. However, the divergence is less dramatic in the Southeast—and the relationship flips around in the Southwest. These opposing regional dynamics underscore the need to tailor recruitment strategies to the unique conditions of each locale.



Gender Disparities in Enrollment Growth

Notable gender disparities exist in enrollment trends, with the population of enrolled women generally growing while that of men is growing more slowly or outright shrinking. However, the magnitude of these disparities varies by region, sector, and selectivity, emphasizing the importance of considering gender-specific recruitment and retention strategies in local contexts to address this significant aspect of enrollment dynamics.



Recent Student Mobility Trends

Migration Data for First-Time Undergraduates at 4-Year Institutions
by State, Region, Sector, Selectivity, and Gender from 2017 to 2021

SECTION

4

Exploring Trends in Student Mobility and Its Significance

One of the main factors driving students' choices in the college search process is an institution's proximity to the student's home. This raises the question: How far are students willing to travel for college? That distance has increased significantly from a very low baseline in the 1970s, but many students still travel only up to 50 or 100 miles away. We also know that this has varied based on income and academic preparedness—with those on the higher end willing to travel further—as well as the quality of in-state options.

This section will explore student mobility patterns by examining where students enroll and where they come from. How has the proportion of in-state students enrolled in each state and broader region changed over time? Do those changes match with demographic trends? And how has it varied by sector and selectivity? A snapshot of out-migration will complement this by indicating where students that are willing to travel are coming from. Together, these trends can provide you with a sense of the overall willingness to travel, which areas are attracting them, and which direction any emergent trends are going.

In-State Enrollment by Region: How has in-state enrollment changed from region to region?

How the in-state enrollment rate varies from place to place and over time can indicate several things. First, it could indicate how willing students in that state are to travel for school. A high or increasing rate could suggest that a significant number of students prefer schools close to their homes—that they're less willing to travel long distances for college. A low or decreasing rate could suggest a higher willingness to travel in the respective region or for specific types of institutions. Second, understanding the in-state enrollment rate can also help you gauge the competitiveness of in-state institutions relative to out-of-state options available to students.

Demographic Factors: Do demographic changes explain changes in in-state enrollment?

Analyzing the in-state enrollment rate in relation with regional demographic trends can provide insights into how well in-state institutions are meeting the educational needs of the local population, as well as how much enrollment changes might be driven by demographic changes. E.g., a shrinking population in a state where in-state enrollment is also dropping might indicate that continued enrollment success requires tapping into reach markets.

In-State Enrollment by Market: How has in-state enrollment differed by sector, selectivity, and student gender?

Charting how in-state enrollment differs across school sectors and selectivity can help you more precisely assess the competitive landscape in your school's particular market. E.g., how does your institution fare against all other schools in your market, and how does your market compare with the performance of other types of schools in attracting local students? Examining how all this varies from place to place can reveal important differences in student mobility preferences.

Out-migration by Region: Which states experience the most out-migration of students?

The out-migration rate more directly reveals the willingness of students to travel beyond their home state for higher education, offering valuable information about student mobility patterns. It's important to note that a high out-migration rate might also suggest that in-state institutions need to enhance their offerings, improve reputation, or address other factors that influence students' decisions to seek education elsewhere.

Together, the in-state enrollment and out-migration rates can aid you in assessing whether your institution is effectively engaging students within your home market, as well as in identifying target areas for recruitment efforts. E.g., areas with lower in-state enrollment and/or higher out-migration rates may be potential target regions for outreach and engagement.

Source: IHE Student Voice Survey 2022; Selingo, Jeffrey (2017). How much longer will students be willing to go away to college?; EAB research and analysis.

Most Students Enrolled in Schools Close to Home in 2017

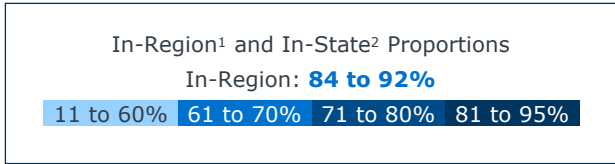
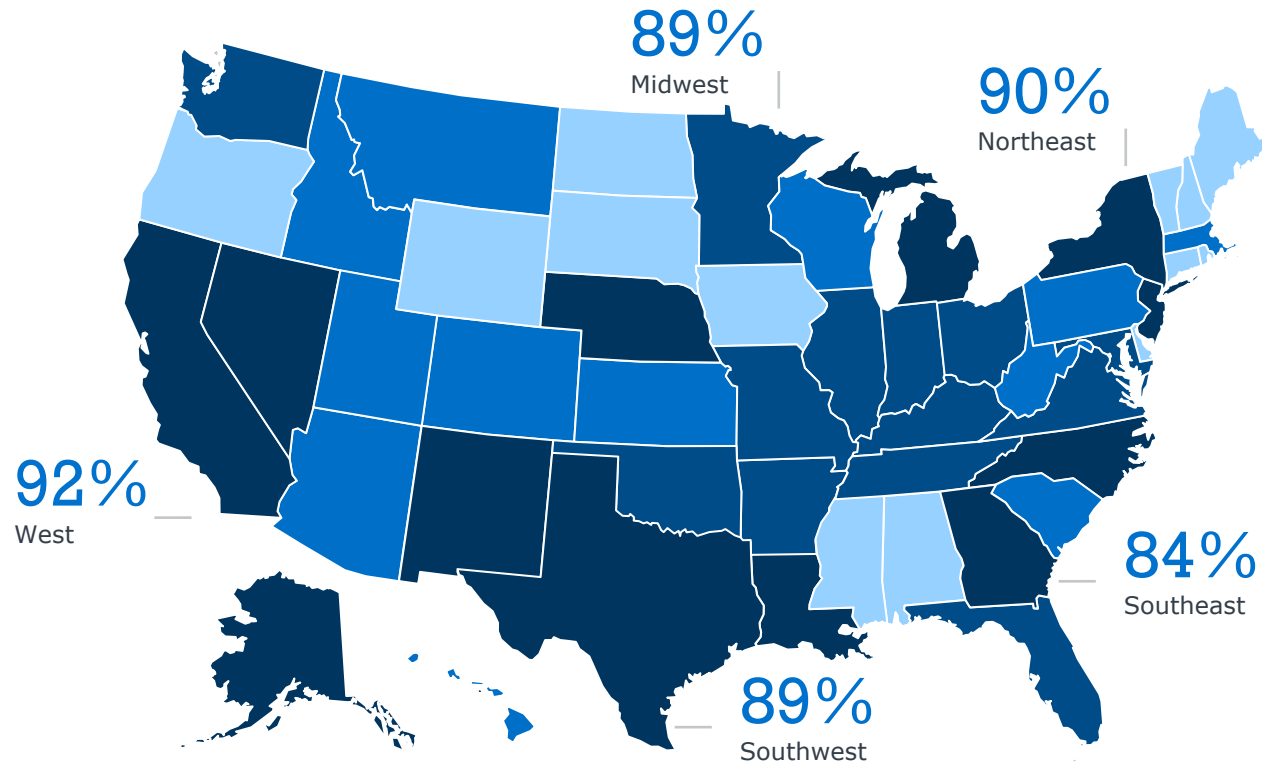
Nationwide in 2017, 75% of students enrolled in 4-year colleges were from the same state as that college, representing an overwhelming majority. Of those that traveled further afield, the high proportion of students remaining within the same region (ranging from 84 to 92%) implies that most were not willing to travel more than a couple states away. But how does this vary from state to state?

The map shows that quite a few states far exceeded the national average for in-state enrollees, which could suggest a lack of willingness of many students in those markets to travel far. Many of these states (e.g., CA, TX, NY) tout highly competitive schools that can draw on large homegrown populations. Quite a few states enrolled relatively large proportions of out-of-state students, though (e.g., OR, IA, MS, CT). Evidently, these states successfully attracted students from further afield.

Overall, this single snapshot in time is difficult to parse. What is most clear is that how much students were willing to travel varied from place to place, even if most did indeed stay close to home. How did this change over time, though?

Regional Variation in In-State Enrollment

Percent of Students Enrolled in Their Home State or Region in 2017



1) Enrollment of students from the same region as the college.
 2) Enrollment of students from the same state as the college.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

But More Students Traveled to Attend College in 2021

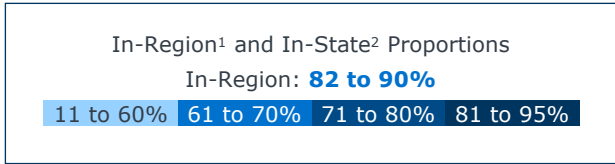
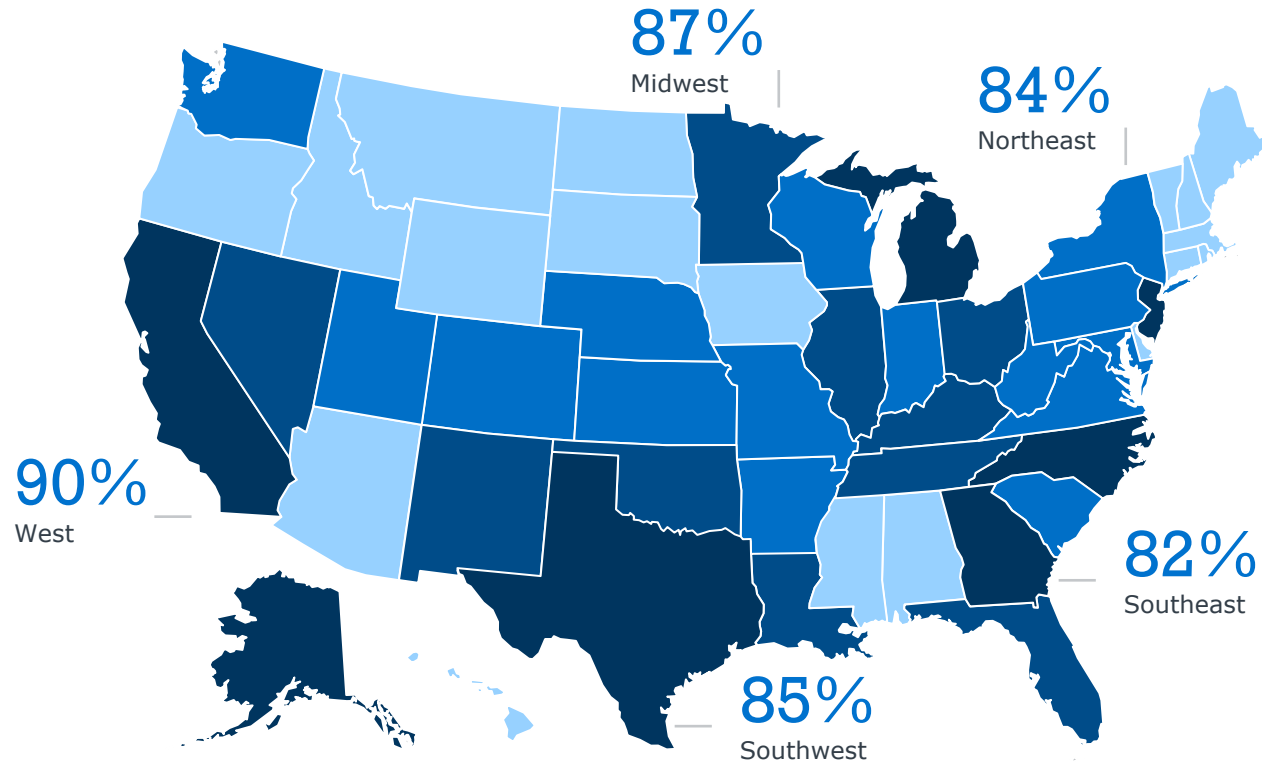
The trend for in-state enrollment was downward across most states (37) from 2017 to 2021. Not only that, but the proportion of students also enrolled within their home region decreased in all cases. Taken together, these trends demonstrate that more students traveled further to attend their school of choice.

This is an overall acceleration of a slow trend over the last several decades, with the sharpest changes found throughout the Northeast. The change in in-state enrollment across all those states decreased by 7.7%, and the change in the proportion of students enrolled from anywhere in the region decreased by 6%. This shows that schools faced with earlier demographic challenges may have found success filling seats by attracting students from farther.

In the Southeast, GA and NC maintained high in-state enrollment, but the region overall drew the highest percentage (18%) of students from other parts of the country, highlighting the broader appeal of the typical school there. Noteworthy since, unlike the Northeast, this region didn't shrink demographically. How do these overall increases in student migration fit with the demographic changes over the same period?

Regional Variation in In-State Enrollment

Percent of Students Enrolled in Their Home State or Region in 2021



1) Enrollment of students from the same region as the college.
 2) Enrollment of students from the same state as the college.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

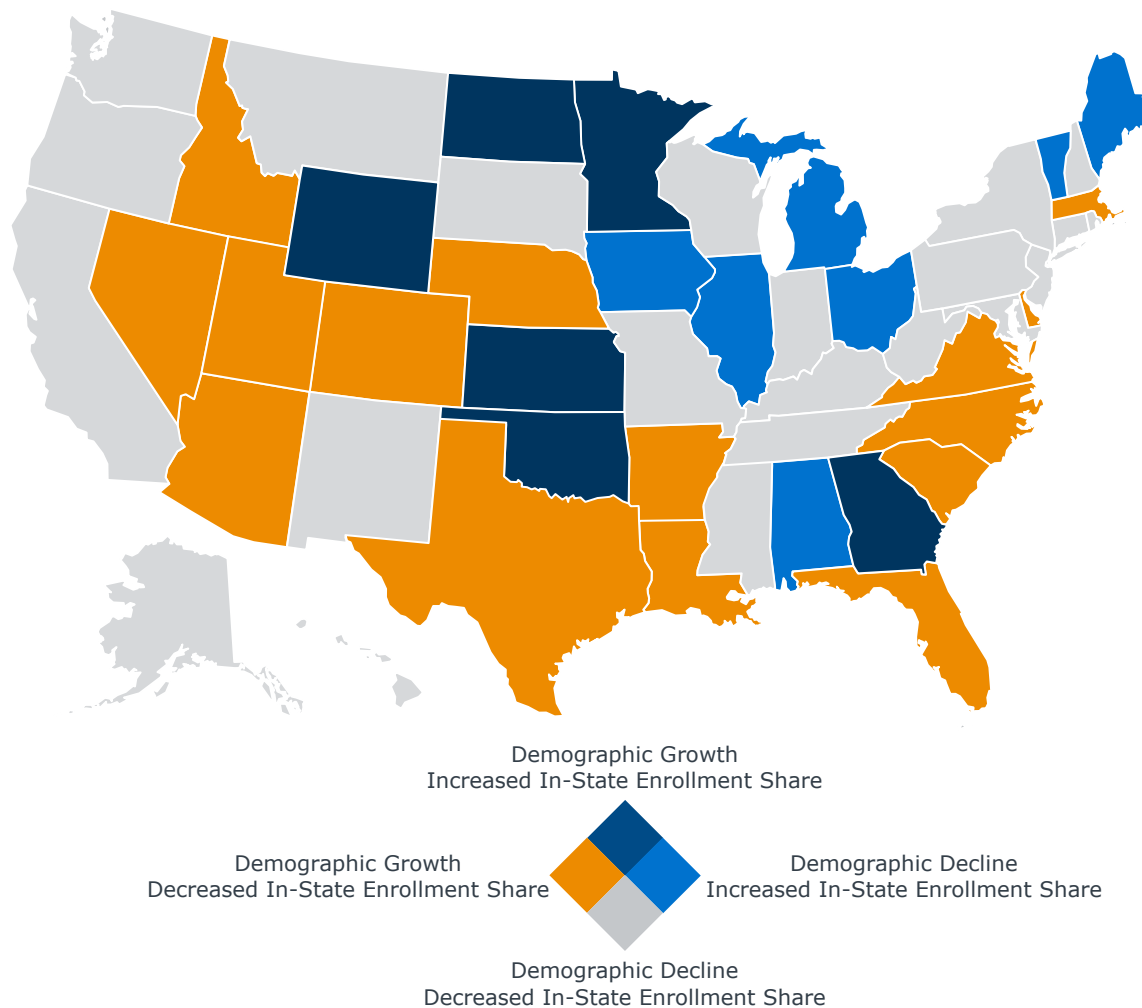
Do Demographic Shifts Explain Changes in Relative In-State Enrollment?

The intersection of change in demographics and in-state enrollment proportions reveals 22 states that shrank demographically while their schools’ share of in-state enrollment also shrank (in gray)—an unsurprising outcome since schools in these states needed to make up for fewer candidates in their primary market (e.g., in the Northeast). Also, 6 states gained in-state share while also rising demographically (in dark blue). Given that all these but GA lost enrollment, it’s likely that these states increasingly relied on prospects in their primary market. These intuitive demographic-driven trends account for shifts in just over half of states (56%).

There were also 15 states that lost in-state share while rising demographically (in orange, mostly in the southern and western regions). Higher out-migration could explain this, but we also know that enrollment rose in many of them (e.g., AZ, FL, SC, ID), suggesting higher in-migration too. There were also 7 states (in light blue) where in-state shares rose while shrinking demographically. Most of these states lost enrollment overall (e.g., MI, OH, AL, VT, ME), meaning they likely were unable to make up for a shrinking primary market through in-migration.

Demographics Influence In-State Enrollment Trends in Some Regions, but Not in All

The Overlap Between Changes in In-State Enrollment¹ and Demographics² from 2017 to 2021



1) The change in proportion of first-time degree-seeking undergraduate students enrolled at institutions in the state who are residents of the same state.
 2) The combined percentage change in the college-age population and the college-going rate.

Sources: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021; 10th Edition WICHE Knocking at the College Door K12 Data; Grawe, Nathan, *The Agile College* (HEDI data file).

Student Mobility Varies Greatly by Region, Selectivity, and Sector

Unsurprisingly, selective schools had overall less in-state enrollment, though it varied region by region. Selective schools in the West had a high proportion of in-state enrollees, while the Northeast had quite low in-state enrollment—even for selective schools. This already low proportion plummeted to only 36% from 2017 to 2021. The share of in-state enrollees shrank in all other regions as well, except for the Southwest, where a relatively high proportion increased further to 81%. Meanwhile, non-selective schools across every region had high proportions of in-state enrollees, but still somewhat less by 2021.

For private schools, in-state enrollment was even lower across all regions than selective schools, not to mention publics (which were expectedly high). It’s especially low for private schools in the Northeast and Southeast, which decreased to 38% and 42%, respectively. Private schools in the Midwest stand out for a slight increase in in-state enrollment. All other regions, sectors, and segments saw a decrease in the proportion of in-state enrollees. This was even the case for public schools, despite much lower levels of out-of-state enrollment.

Increasing Student Mobility, Even in Historically Local Bastions

Change in In-State Enrollment for 4-Year Institutions from 2017 to 2021



1) Acceptance rates below 65% in 2017.
 2) Acceptance rates at or above 65% in 2017.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

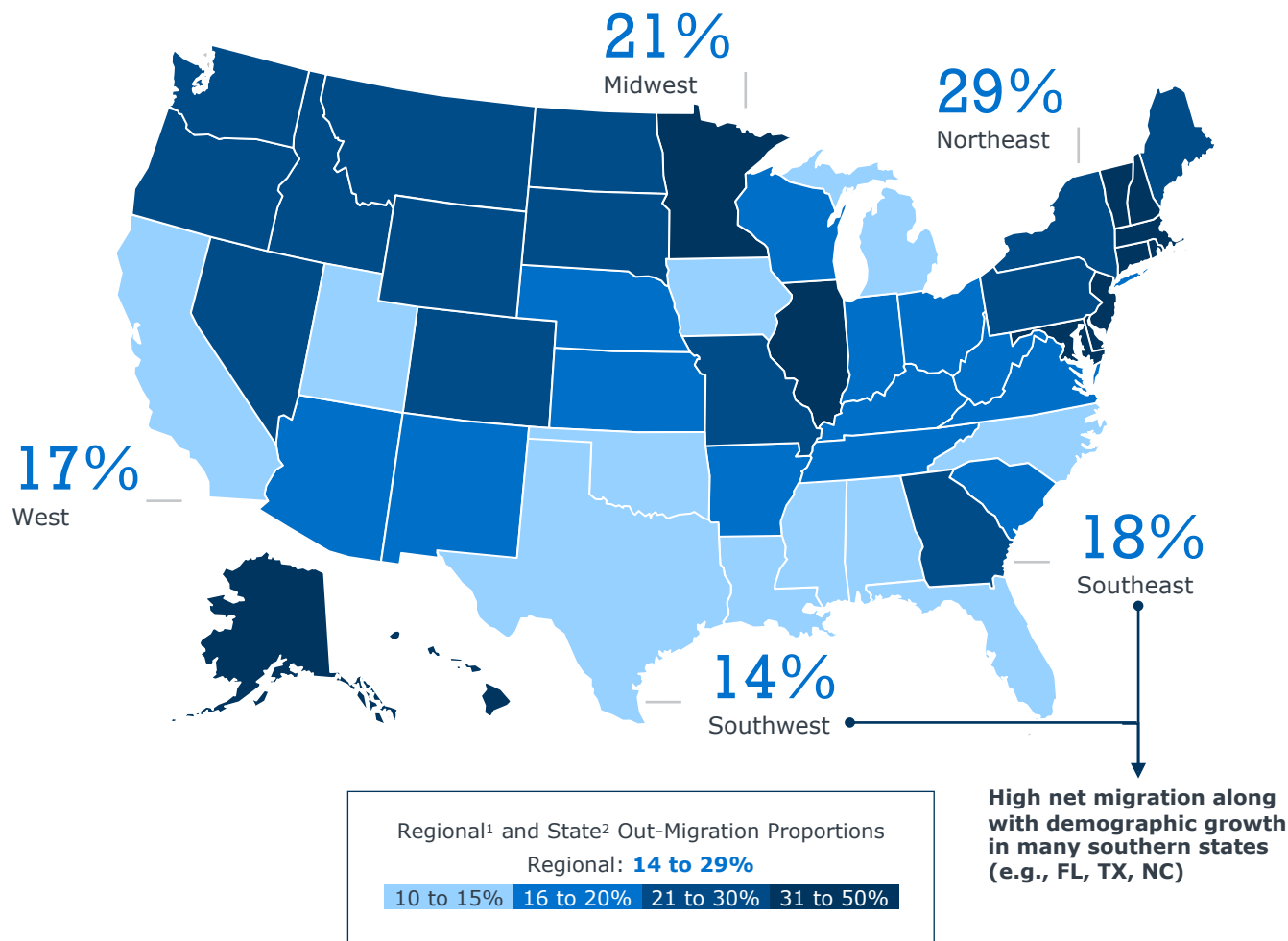
A North-South Divide in Out-Migration

The proportion of college-going students enrolling out-of-state varied from 10 to 50%. Generally, students in the north—especially those in the Northeast—enrolled out-of-state more than those in the south. This is interesting given the demographic challenges in the Northeast and the more favorable conditions in the south. While we know that many students from Northeastern states that enrolled out-of-state still stayed within this circumscribed region, an outsized 29% did leave the region. This highlights a broader north-south divide in willingness to travel.

When we refer back to in-state enrollment, it's also clear that in-state enrollment and out-migration are related in many cases. Many states have a high outflow of students that went along with low in-state shares of enrollment (e.g., OR, VT), while others had a low share of outgoing students with a high percentage of in-state enrollees (e.g., CA, TX, FL, though the absolute numbers in such large states can still be high). There are many exceptional cases, though, such as those where both in-state enrollment and out-migration were high (e.g., NV, GA, IL, MN, NY, NJ), or both were low (i.e., IA, MS, AL).

Regional and State-by-State Variation in Student Out-Migration

Percent of Students Enrolled Outside of Their Home State or Region in 2020



1) Students who enrolled in a college outside of their home region.
2) Students who enrolled in a college outside of their home state.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Key Takeaways from Mobility Trends

Overall Increased Migration, Mixed with Significant Regional and Market Differences

Exploring the dynamic landscape of student mobility shows the increasing willingness of students to travel for their education. The variation in these patterns underscores the interplay between location preference, demographics, and institutional competitiveness. These trends collectively offer valuable perspectives on student mobility preferences and can guide strategic decisions to attract and engage prospective students in markets near and far.



Willingness to Travel Continues to Increase

The landscape of student mobility is continuing to evolve, with a noticeable decrease in in-state enrollment rates across most states and regions. This shift indicates that students are increasingly willing to travel longer distances for their higher education, reflecting a changing preference and/or an increasingly competitive environment. However, the extent of this willingness varies greatly from place to place.



Demographic Changes Structure the Need for Out-of-State Enrollees, but Migration is Uneven

The relationship between regional demographic changes and shifts in in-state enrollment underscores the importance of grasping students' willingness to travel. For instance, while states with demographic growth and rising in-state enrollment highlight institutions' capacity to tap into their local talent pool, states experiencing both demographic decline and decreased in-state enrollment reflect the need for schools to seek enrollees beyond their immediate market. Exceptions abound though, such as states in the south and west where populations grew but schools continued to draw more out-of-state enrollees.



Selective & Private Schools Remain Attractive, but Non-Selective & Public Schools are Competing

The precise in-state enrollment dynamics differ between all segments. Selective and private schools, particularly in the Northeast, exhibit the lowest in-state enrollment rates—and the biggest shifts further downward. However, some regions like the Southwest continue to show high proportions of in-state enrollees, emphasizing the role of regional appeal and competitiveness. But segments in all regions—even public and non-selective schools—are increasing out-of-state enrollment, demonstrating students' increased willingness to travel for all segments.



A North-South Divide in Out-Migration

A clear north-south divide emerges in student willingness to travel out of their home state for higher education. Northern states, particularly in the Northeast, demonstrate higher proportions of both regional and state out-migration, despite facing demographic challenges. This trend shows where students are most willing to travel from but underscores the importance of understanding regional student mobility preferences, whether crafting recruitment strategies targeted toward primary or reach markets.



Current Inquiry Trends

Inquiry Data for Prospective First-Time Undergraduates at 4-Year Institutions by State, Region, Sector, Selectivity, and Gender for the Classes of 2021-2023

SECTION

5

Exploring Trends in Student Inquiries and Their Significance

Having explored the regional trends in demography, applications, and enrollment, our attention now pivots to an earlier phase of college search—but a more recent set of trends: those emerging from student inquiries in EAB's Audience (up to and including the class of 2023, detailed on the following page). While an individual inquiry reveals a single student's interest in an institution, charting aggregate inquiry trends offers a glimpse into the broader (and more recent) landscape of student choices in the college search process.

Within this section, we introduce the central cohort, EAB's Audience, and chart the most recent changes in inquiry volume across regions and markets, observing the impact of recent demographic shifts. We also explore students' favored majors and the patterns of search within and beyond states and regions that highlight potential student mobility. The resulting trends will both build upon the admissions insights established earlier in this paper—extending them past 2021 to the most recent cohort of students—as well as deepen our understanding of how students are conducting their college search in various regions and markets before choosing where to apply and enroll.

Shifting Inquiry Landscape: What recent trends emerge in inquiry volumes across states and regions?

This exploration of inquiry volumes across states and regions is crucial in a landscape where declining college-age population and college-going rates demand heightened focus on market share. In a shrinking student pool, institutions must strategically attract and capture a larger portion of potential students. Examining inquiry distribution provides insights into evolving interest patterns, helping you understand market evolution and competitiveness in comparison to other areas.

Demographic Effects: How much do demographic shifts impact fluctuations in inquiry volume in each region?

Mapping the relationship between inquiry fluctuations, demographic shifts, and college-going rates reveals important shifts in your market's enrollment dynamics. This can help you pinpoint areas of demand, competition, and untapped potential to inform strategic decisions.

Student Engagement: When are students most active in their college search and to what extent?

Understanding when students submit inquiries offers a glimpse into their engagement timeline. If inquiries are clustered during specific periods or shifting earlier or later in time, you can tailor outreach efforts accordingly, ensuring effective engagement during crucial decision-making phases. Additionally, measuring the number of colleges with which students inquire indicates the scope of their exploration. A higher number might suggest a broader search or increased competition, prompting institutions to enhance their value proposition, communicate distinctiveness, and streamline application processes.

Program Attraction: Which majors are attracting the most interest among potential students?

Recent student surveys reveal that one of the main factors in making the college choice is the major field of interest offered, with increasing emphasis on a field's success on the job market. Charting popular majors and gender-based preferences in inquiries provides a clear window into evolving student preferences during their college search. This information shows the shifting landscape of student interests, enabling you to align communication strategies and outreach efforts to resonate with these evolving preferences.

Regional Strategy: What do in-state and out-of-state inquiries reveal about potential student mobility?

Recent surveys also reveal that one of the main factors driving students' choices in the college search process is an institution's proximity to the student's home. Delving into the dynamics of in-state and out-of-state inquiries—identifying regional differences, sector disparities, and out-migration trends—can reveal the willingness of students to venture beyond their home state or region for education. These insights can guide decisions on regional outreach and market expansion strategies.

A Broad Population of High-Intent Students Underpinning Inquiry Trends

While the previous sections focused on recent trends based on the complete population of students applying and enrolling at four-year institutions from 2017 to 2021, the underlying data are published with a significant lag time. To provide a more current perspective, the following section leverages EAB's up-to-date and representative set of student inquiry data.

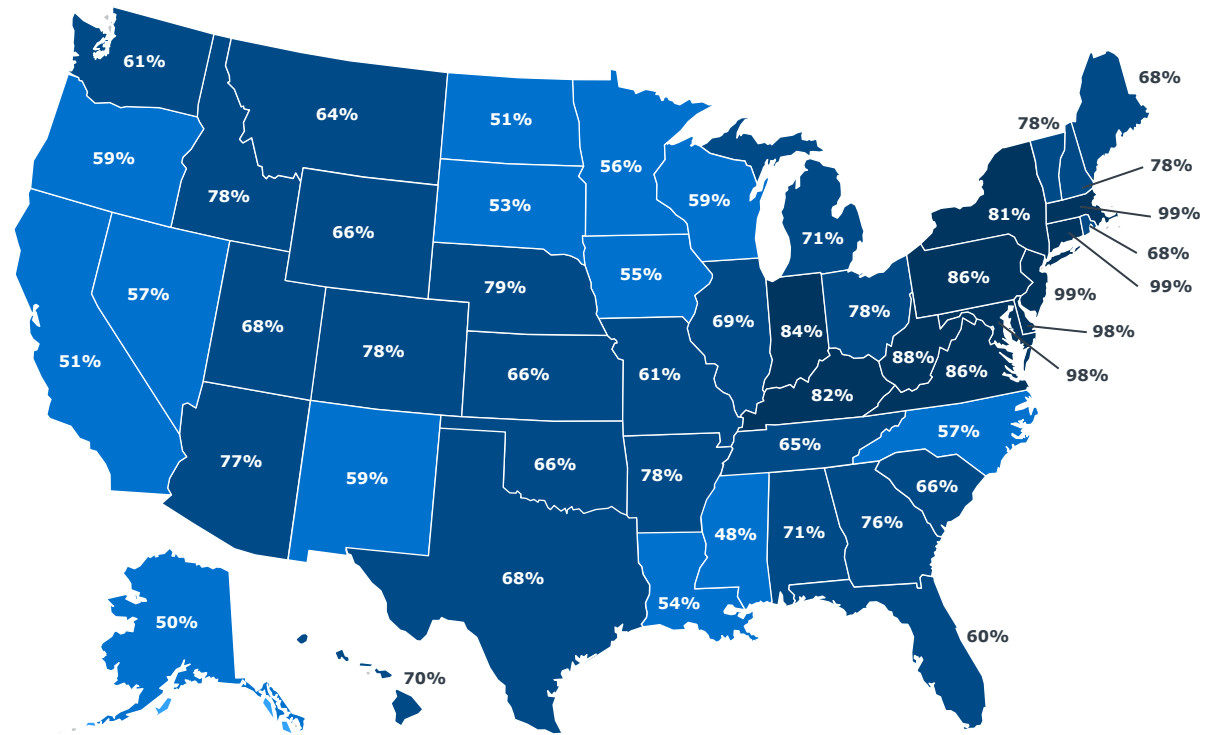
The population underpinning the inquiry trends presented throughout this section comes from the combined members of EAB's Audience platforms: Apply and Intersect.

- Intersect connects with Naviance, a college, career, and life readiness platform that serves more than 10 million students.
- Apply generates inquiries through an expansive network that includes more than half of U.S. college-bound students.

Both these networks consist of high-intent students that, when combined, form a large majority of college-bound students across the country. The result is an expansive pool of engaged prospects from which we can glean shifting and emergent trends in the college search process.

A Representative Population from EAB's Current Audience Inquiry Data

Percent Representation for Class of 2023 College-Going Students by State



71%
of college-bound students are in EAB's growing student audience

Source: EAB research and analysis.

Variation in Inquiry Volume Across Incoming Classes and Regions

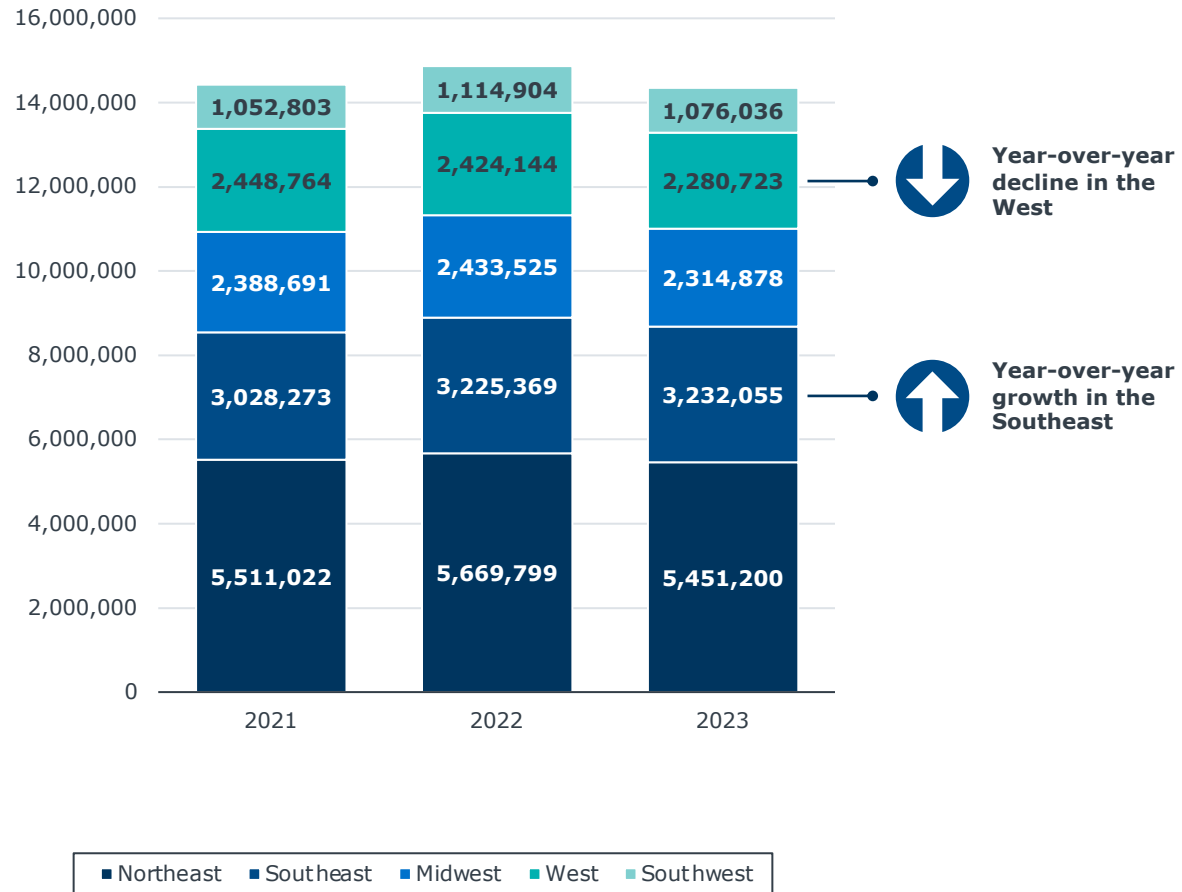
The volume of inquiries from the last three incoming classes was large overall—over 14 million. A surge in inquiries from the class of 2022 resulted in a remarkable 2.9% uptick in nationwide inquiries. This upswing can likely be attributed to the excitement surrounding campus reopenings later in the pandemic, rendering it a pivotal year for enrollment across the spectrum. The energy tapered somewhat with the class of 2023, as inquiry volume receded by 3.5% from its 2022 peak, essentially reverting to the previous level.

However, the ebb and flow of inquiry volume exhibited distinct regional variations. The Northeast reigned supreme in volume, albeit with a slight contraction. The Southeast followed closely in volume, but progressively grew each year. The Midwest and West exhibited parallel volumes that gently diminished over the past three years. Lastly, the Southwest, with the most modest volume, paralleled the Southeast’s overall growth trajectory.

But deeper exploration will show how markets in the states comprising these regions didn't uniformly mirror the ebbs and flows of inquiries in their wider region.

Regional Variation in Inquiry Volume by Incoming Class

Inquiry Volume by Class and Region for 4-Year Institutions



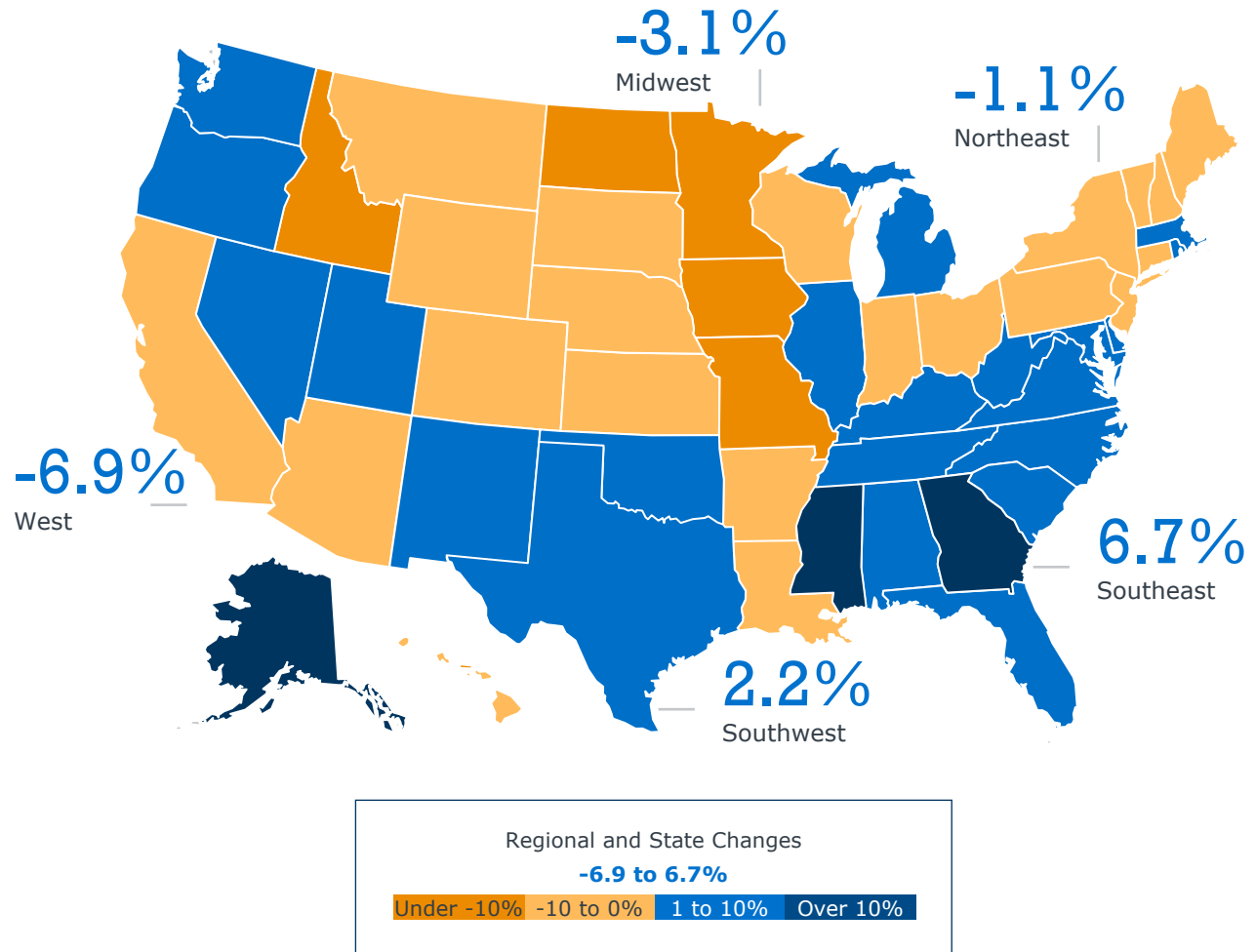
Current Changes in Inquiries Align with Earlier Changes in Enrollment

When we look state-by-state at the change in inquiry volume that colleges received over the last three years, we see similar trends to those in the application and enrollment data from 2017 to 2021. The close directional alignment of changes in inquiry volume with enrollment trends is particularly notable for each region and, in many cases, individual states. This suggests a closer connection between inquiries and enrollment than with applications—and a continuation of the trends charted for 2017 to 2021.

As has been the case for each trend charted up to this point, there were pockets of growth and decline. However, the Southeast stands out once again as home to large growth across nearly every state in the region. A similar trend, if less dramatic, took hold in the Southwest as well.

A contrasting story unfolds for most northern states, marked by overall contraction in the Northeast, Midwest, and especially the West. As the last page highlighted, there are still high overall volumes—especially in the Northeast—but these are negative trajectories that mirror what we’ve seen for applications and enrollment in the five-year period leading up to this.

State-by-State and Regional Variation in Student Inquiries Received
Percent Change in Inquiries for 4-Year Institutions from the Classes of 2021 to 2023



Source: EAB research and analysis.

Demographics Play a Large—but Not Exclusive—Role in Market Changes

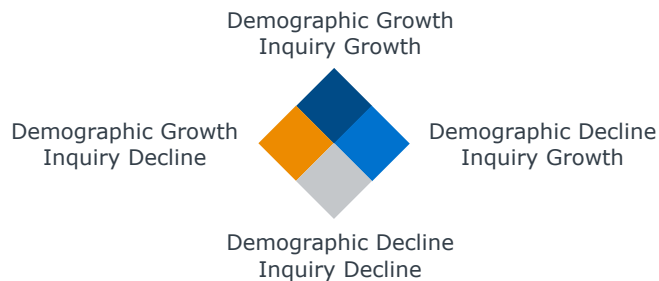
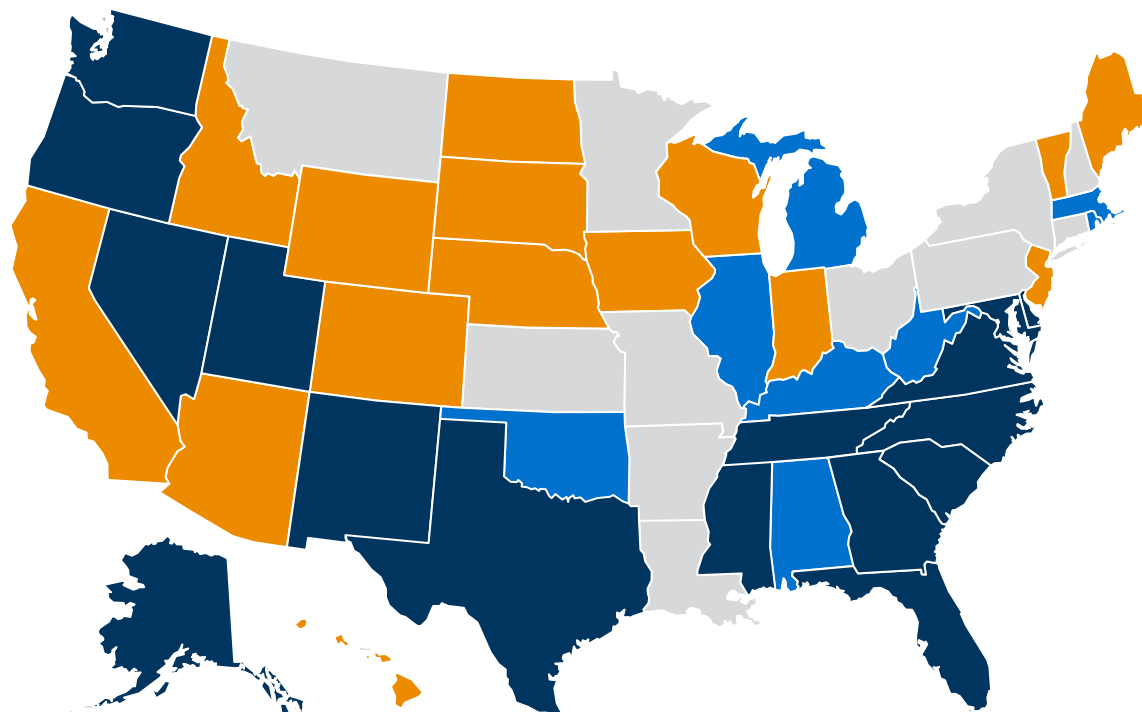
There was a 54% overlap between the direction and size of changes in the college-going population and inquiry volume by state—which isn’t surprising given that demographics directly impact prospect pools. It clearly isn’t directly driving all changes, though, as this overlap is lower than that observed between shifts in application or enrollment volume and demographics.

There were 16 states where both the population and inquiries grew (in dark blue). Such states are found mostly in the West, Southwest, and especially in the Southeast. There, most states were home to both demographic growth and an increase in student inquiries. On the opposite end of the spectrum were 11 states with declines in both categories (in gray). Every region had at least one such state, but roughly half the states in the Northeast fell into this pattern.

There were also some states where inquiry volume grew despite demographic decline (light blue) in all regions but the West, whereas there were many more where inquiries declined despite demographic growth (orange)—especially in the West and Midwest. Clearly demographics are not the only force at work.

Clear Regional Patterns in How Demographics Influence Student Inquiries

The Overlap Between Changes in Inquiry Volume and Demographics¹ from 2021 to 2023



1) The combined change in the college-age population and the college-going rate.

Source: EAB research and analysis; 10th Edition WICHE Knocking at the College Door K12 Data; Grawe, Nathan, *The Agile College* (HEDI data file).

Different Regions with Very Different Trends Between Market Segments

Turning to how trajectories in inquiry volume varied by region and market segment over time: public schools—especially selective public schools—drove the most growth.

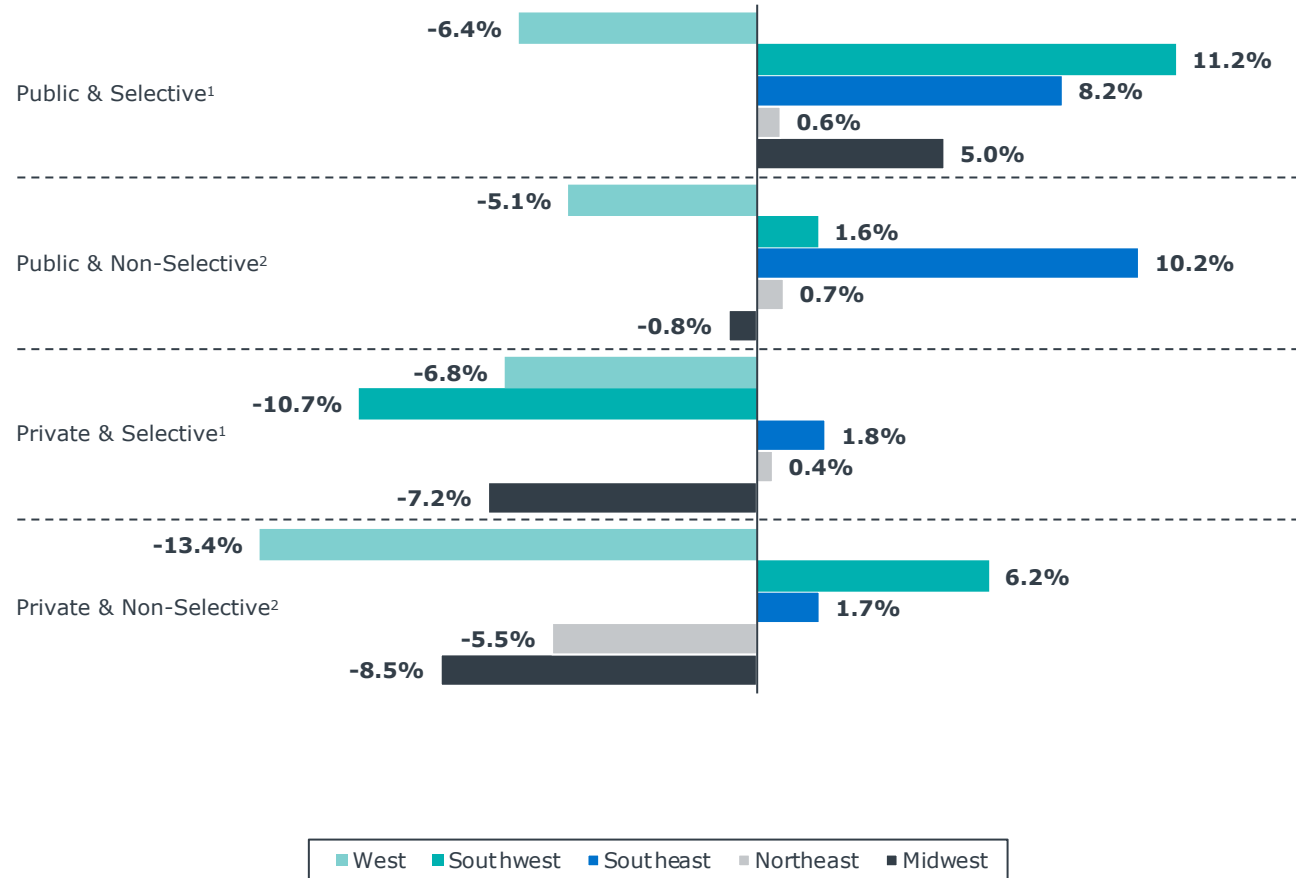
Most regions had a mix of growth and decline across markets. The Midwest, for example, shrank across many segments, except for public selective schools. The Southwest, on the other hand, grew in most segments, except for selective private schools. The Northeast grew slightly in most market segments, if quite slowly. It continued to dominate with overall inquiry volume for private schools, but that volume shrank when it came to non-selective private schools.

Two regions stood out for growth or decline across all segments. The Southeast was exceptional for both high volume and high growth across all segments—especially across public schools. Meanwhile, all segments shrank in the West, which started with an already low total volume.

Together, these trends suggest that, while some regions grew across all segments (i.e., Southeast), market segments are subject to conditions and student preferences that vary significantly from region to region.

Variation in Student Inquiries Received by Market Segment and Region

Percent Change in Inquiries by Sector and Selectivity¹ from the Classes of 2021 to 2023



1) Acceptance rates below 65% in 2021.
 2) Acceptance rates at or above 65% in 2021.

Students Are More Deliberate with Inquiries and Inquiring Later

How often are students inquiring, and when? While students are submitting more applications on average (>7), the last several incoming classes submitted an average of only 5 each. Fewer inquiries than applications implies that students might be more deliberate with whom they inquire. When we look at how inquiries are distributed across markets, we see it varies significantly by segment: students submitted many more inquiries to schools that are public and non-selective than most others—especially private and non-selective ones.

As to when students are inquiring during their search, it was broadly similar for the last few classes: very little in freshman year, with a slight increase in sophomore year. The real activity began in junior year—starting in the fall but peaking in the spring and summer. The highest peak was in the fall semester of senior year for each class. Noteworthy is that the class of 2021, which had a similar overall inquiry volume as 2023, had slightly higher peaks earlier on and lower peaks in senior year. This fits with EAB’s recent surveys that suggest students are conducting their search later in their high school careers.

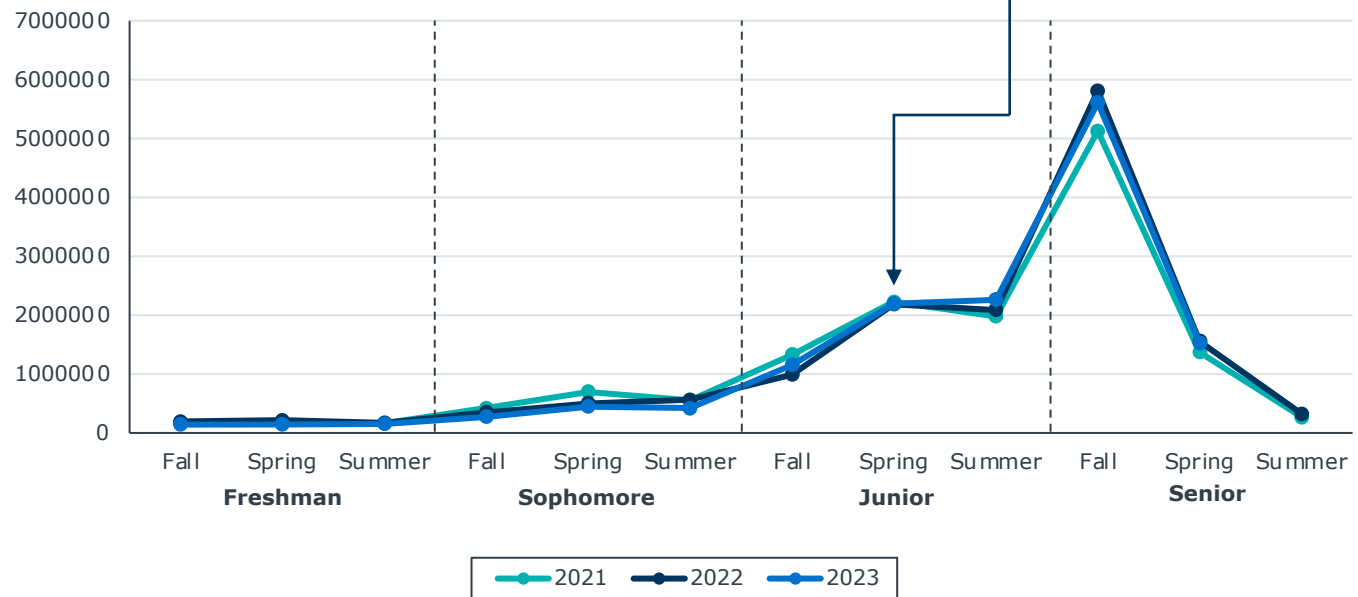
Variation in the Share of Inquiries by Institutional Sector and Segment

Percentage of Inquiries by Sector and Segment from the Classes of 2021 to 2023

	Non-Selective ¹	Selective ²
Public	33%	20%
Private	19%	28%

Recent Classes are Inquiring Later

Timing and Volume of Inquiries from Classes of 2021 to 2023



1) Acceptance rates at or above 65% in 2021.
 2) Acceptance rates below 65% in 2021.

Source: EAB research and analysis.

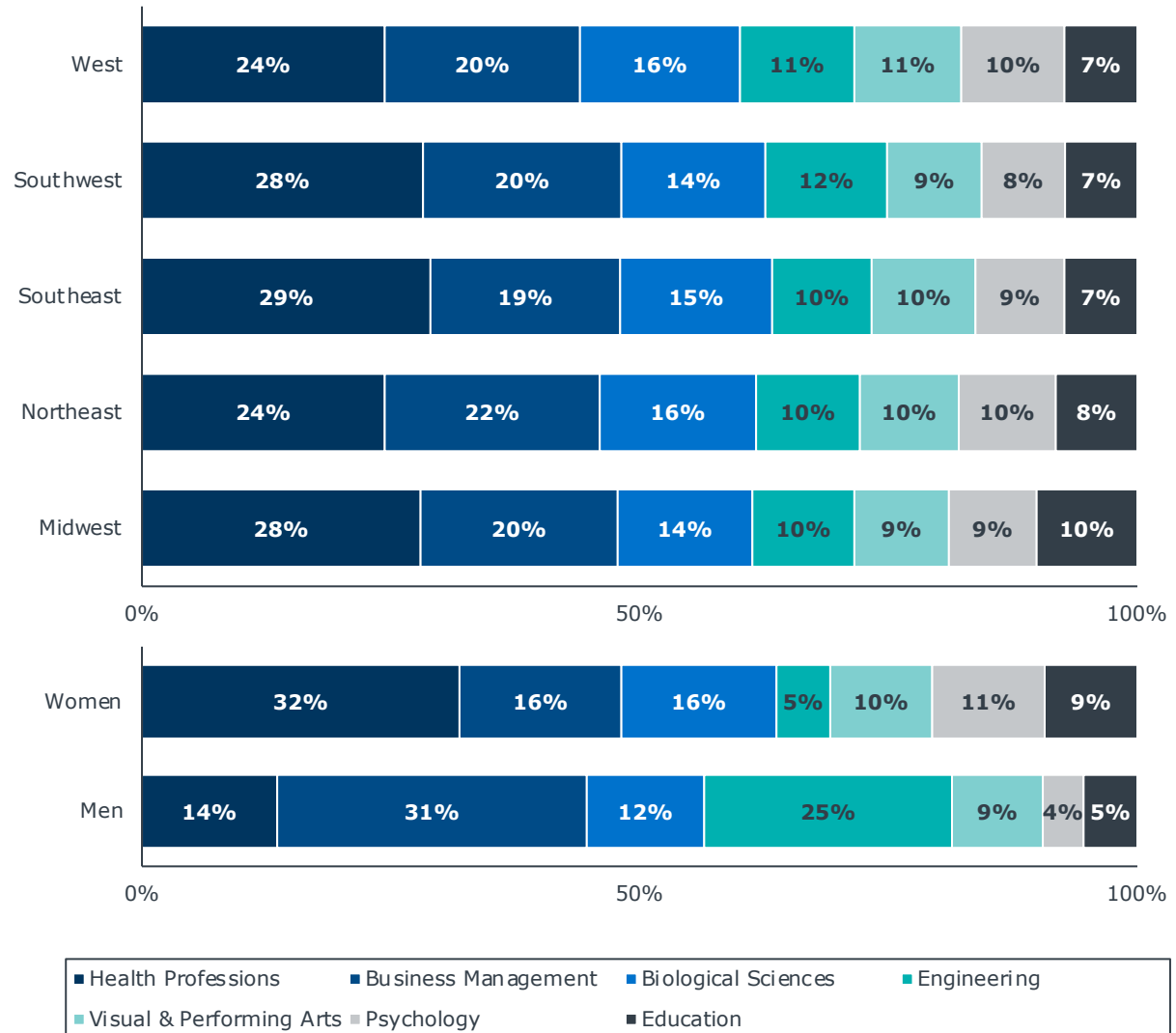
Unsurprising Major Preferences: Clear Career Paths that Vary by Gender

Which majors attracted the most interest during recent college searches? EAB’s Appily platform provides a huge variety of options to choose from, but student choices were dominated by the top seven: Health, Business, Biology, Engineering, Arts, Psychology, and Education. It is easy to see this overwhelmingly consists of majors with clearer career paths—especially health professions and business, which constituted roughly half of the top seven. The humanities are not completely absent, though, as the visual and performing arts are the fifth-most preferred. Overall, the data confirm trends most enrollment leaders have seen in their own data.

The regional variation in these stated preferences is not profound, but huge differences emerged in the relative share of preferences between men and women. For example, dramatically more women preferred health professions and education than men—roughly twice the proportion in both cases. This stemmed from both above average preference among women and below average preference among men in those majors. Conversely, many more men preferred business and engineering, particularly the latter, with five times the share of men preferring engineering.

Regional and Gender¹ Variation in Preferred Majors

Relative Share of the Top Seven Preferred Major Fields from the Classes of 2021 to 2023²



1) Data on non-binary genders are limited.
 2) This only includes data from students on the Appily platform, which records such preferences.

Source: EAB research and analysis.

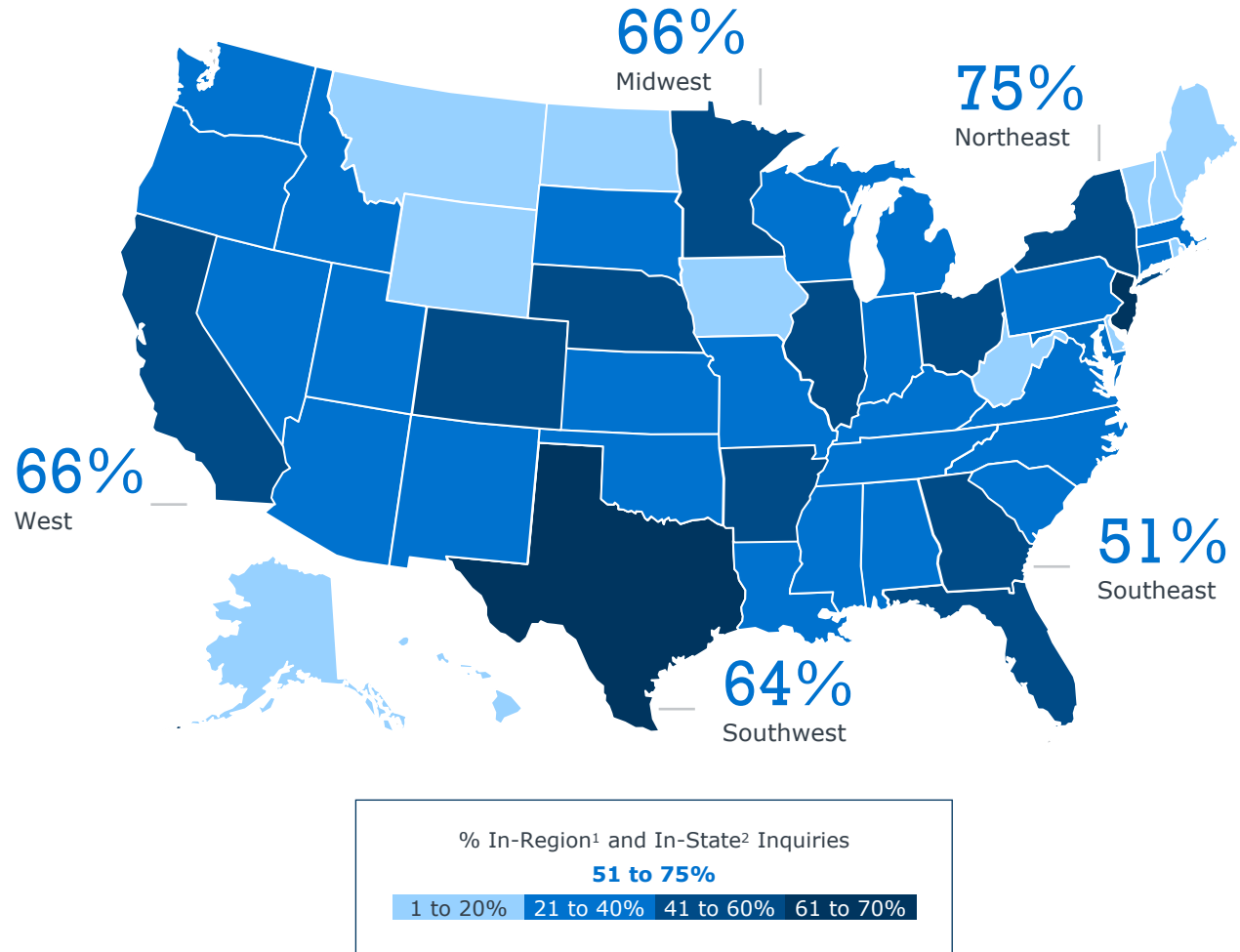
Schools in Most States Received a Majority of Inquiries from Out-of-State

Turning to the potential mobility trends, charting the proportion of inquiries colleges received from within their home state in recent years reveals a much wider range than was seen with in-state enrollment trends from 2017 to 2021, which averaged 70% or more on the state level and 80% or more on the regional level. While lower-population states still had the lowest proportions of inquiries coming from within the same state, the average institution in most states saw less than half of all inquiries originating in-state.

Not only that, but many inquiries came from outside their region. There is high variation between regions in this regard, but the Southeast truly stands out here with only 51% of inquiries received coming from within the region. Meanwhile, schools in the Northeast relied more on “regionally local” students with 75% of inquiries coming from within the same region. This poses an issue for the Northeast (and shrinking-population states): To maintain or grow enrollment with fewer local prospects and declining college-going rates, institutions may need to recruit more from neighboring states or regions—but their neighbors may do the same to them.

High State-by-State Variation in the Proportion of In-State Inquiries Received

Percentage of Inquiries Colleges Received from In-State and In-Region for the Classes of 2021 to 2023



1) Inquiries that colleges received from students anywhere in that same region.
 2) Inquiries that colleges received from students anywhere in that same state.

Source: EAB research and analysis.

Reliance on Out-of-State Students Varies Widely by Region and Segment

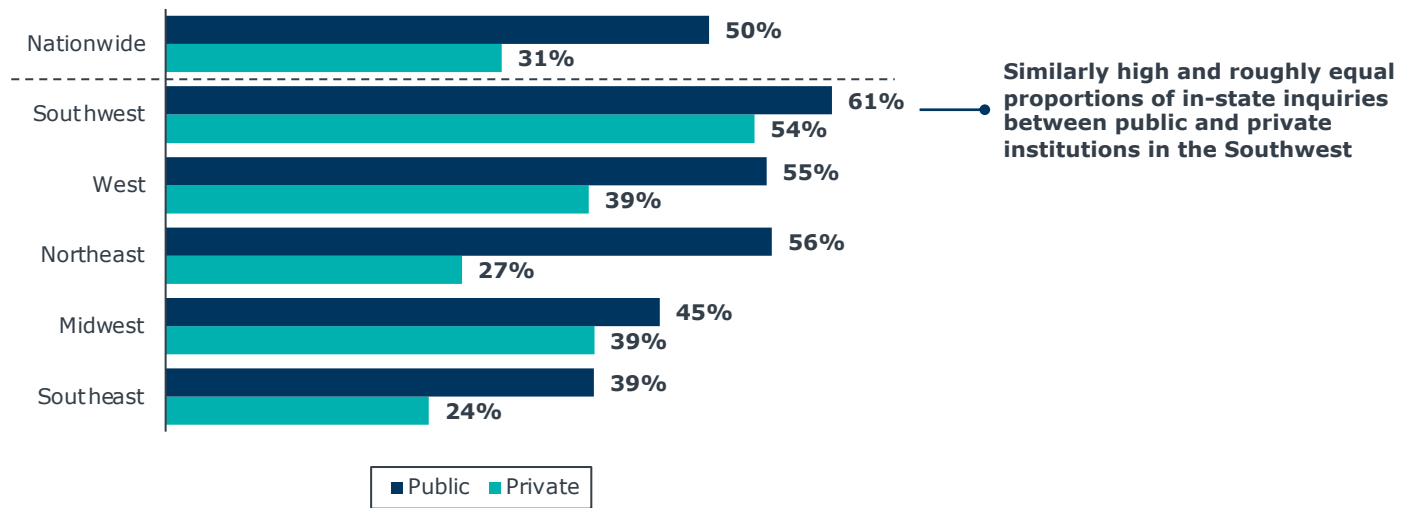
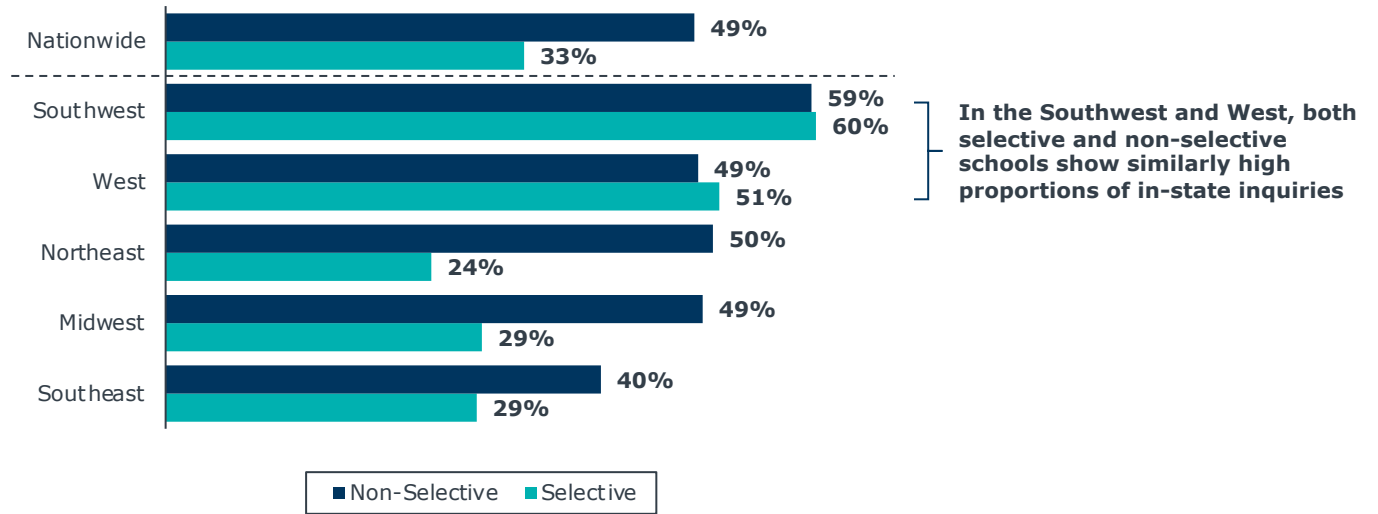
In-state proportions varied little by gender but differed notably by sector and selectivity. Selective¹ schools attracted twice as many out-of-state inquiries compared to in-state, while non-selective² schools generally had equal shares. This pattern held true for private and public institutions, respectively, aligning with the reach of selective schools and financial incentives for in-state attendance at public ones.

Yet, exceptions existed regionally. The West and Southwest had overall higher in-state proportions, as well as parity between selective and non-selective schools. Public and private institutions in the Southwest also had parity in this regard.

Given that public schools are traditionally targeted toward local populations, it is remarkable that half of inquiries received by them came from out of state. It is understandable, though, since regional publics are particularly pressured to look beyond their primary market, especially in places impacted by demographic decline or where flagships have encroached on their prospect pool. This is a trend that is likely to continue given the adoption of tuition policies at many public schools meant to entice students from other states.

Variation in In-State Inquiries Received by Market Segment¹ and Region

Percentage of Inquiries Colleges Received from In-State for the Classes of 2021 to 2023



1) Selective (i.e., acceptance rates below 65% in 2021) versus non-selective (i.e., acceptance rates at or above 65% in 2021) and public versus private sector.

Source: EAB research and analysis.

Highly Regional Patterns of Outgoing Student Inquiries

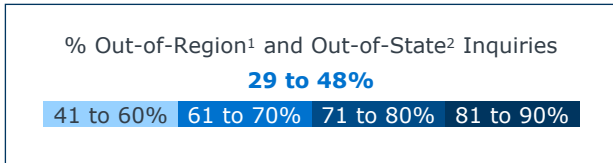
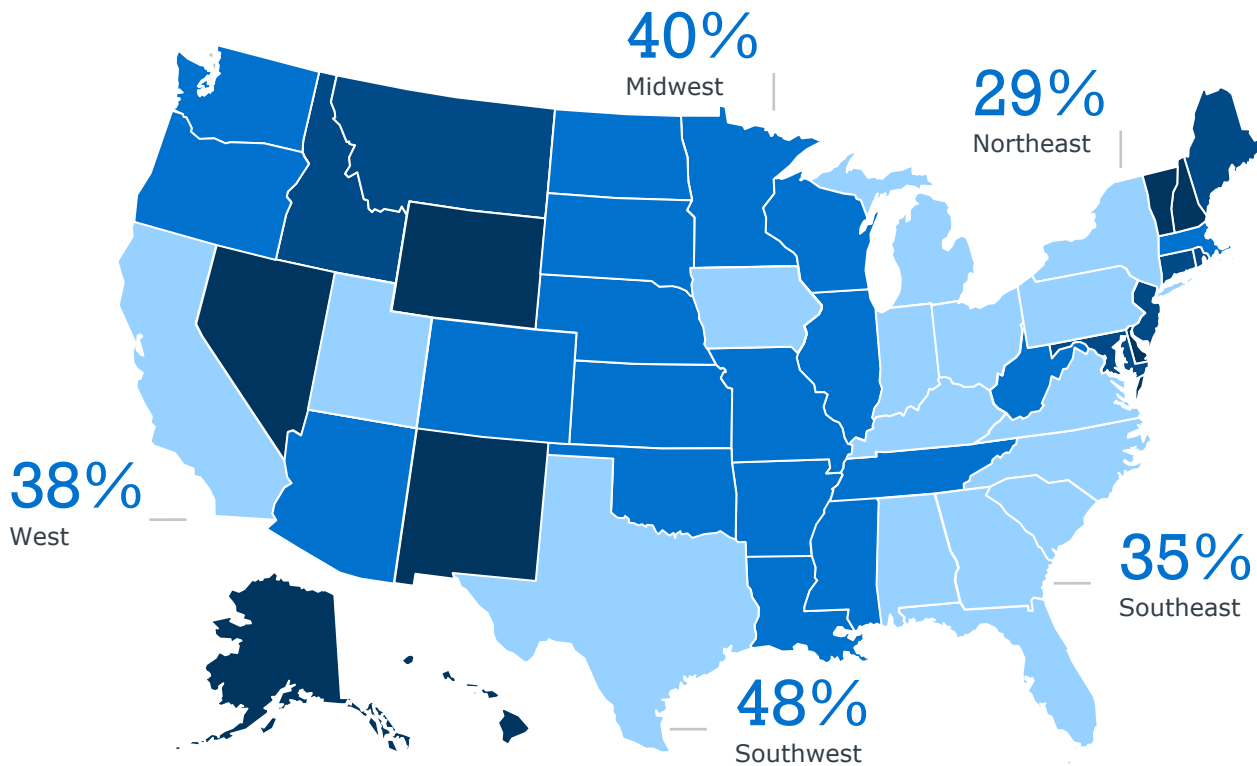
With many schools trying to boost out-of-state interest to make up for shrinking populations at home (e.g., Northeast, Midwest), we should also examine where students are looking beyond their home state (or region). This reveals that large proportions of students looked beyond their home, particularly among low-population states (e.g., WY, NH).

There were also clear regional trends, especially in the Southeast, where students were less likely to inquire outside of their home state and region. The Northeast also had fewer students inquiring outside the region (29%), though many students inquired outside of their own state. This likely points toward a reliance by schools there on the already large college-going population in the region, which is a limiting strategy over time given the demographic trends.

The Midwest showed median out-migration, while the Southwest and West exhibited more students sending out-of-state and out-of-region inquiries. Despite regional population growth, this hints at a "brain drain." Paired with the lower proportion of out-of-state inquiries colleges in these states received, the result is a much smaller prospect pool in the region.

High Proportions of Students Sent Inquiries Outside of Their Home State and Region

Percentage of Inquiries Students Sent Out-of-State and Out-of-Region for the Classes of 2021 to 2023



1) Inquiries that students sent to a college outside of their home region.
 2) Inquiries that students sent to a college outside of their home state.

Source: EAB research and analysis.

Key Takeaways from Inquiry Trends

Growing Changes That Demand Proactive Approaches

From regional inquiry trends hinting at continued shifts in enrollment, to the nuanced interplay between demographics and recruitment strategies, these findings emphasize the need for adaptable and tailored approaches. The deliberate nature of inquiries underscores the value of personalized interactions, while program attraction factors illuminate the importance of aligning offerings with career aspirations. Additionally, evolving mobility trends necessitate strategic outreach beyond borders. Embracing these insights helps steer your institution towards enrollment success in a changing landscape.



Substantial Shifts in the Inquiry Landscape from North and West to South

The alignment of student inquiry shifts with past enrollment trends indicates the persistence of these patterns, offering insights into future enrollment outcomes. This highlights the need to proactively anticipate and respond to these shifts. Notably, the increased inquiries toward southern institutions signal a growing interest in this region, requiring strategies to understand and leverage this trend effectively.



Demographics Shape Market Dynamics, Yet Active Strategies Drive Real Success

While demographic shifts significantly impact the Northeast and Southeast, the broader landscape reveals that many states experienced inquiry share changes that diverge from population trends. This underscores the need for a comprehensive approach to recruitment expansion, financial incentives, program customization, and more to foster meaningful engagement and enrollment—particularly in regions with evolving dynamics.



Student Engagement is Deliberate and Extending Into Spring of Senior Year

Students are more intentional in their inquiries, preferring quality over quantity, unlike with applications. This underscores the significance of personalized communication tailored to individual preferences and academic interests. To leverage this, prioritize value in every interaction and connect when students reach out to resonate effectively. Additionally, the evolving timeline of student engagement—active from the junior year through the fall of the senior year and extending into the spring—requires institutions to remain engaged with students throughout this extended period.



Career-Centric Program Attraction and Gender-Based Preferences

Majors with clear career paths, like health professions and business, dominate student preferences. Institutions should emphasize career support for all majors and tailor marketing to address these trends. Also, recognizing gender-based program preferences can inform targeted marketing efforts to engage prospective students accordingly.



Expanding Student Mobility Demands Strategic Responses

Growing numbers of students are seeking opportunities beyond their home states, necessitating customized recruitment approaches. Highlighting distinctive strengths, like successful athletic programs, can attract out-of-state students. In areas facing a “brain drain,” retention strategies and high school partnerships play pivotal roles in rebuilding local student communities.

Navigating the Changing Tides of Higher Education Enrollment

In the landscape of higher education, one thing is abundantly clear: the tides of enrollment are shifting, and they do so uniquely from place to place and by institutional segment. We've charted these trajectories across space and time, exploring the interplay of factors influencing college search trends, and it's essential to recognize that the enrollment landscape is far from uniform. Trends fluctuate, and what works for one institution in one region may not be effective for another. Understanding the dynamics within your specific context is paramount. But beyond the fascinating variances and patterns, there are some critical takeaways for you to consider.

Demographic Pressures



Variable Growth and Decline

The fluctuations in the prospective student population are felt far beyond their place of origin. As certain regions experience declines, the recruitment conditions become more competitive everywhere. This inherent competition necessitates a strategic approach to enrollment management.



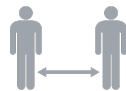
Competition Over Fewer Prospects Is Inevitable

Competitive Pressures



Application Volume Is Rising

Application volumes have surged in recent years. However, the reality is that students are diversifying their options by applying to more schools and students across segments and regions are more open to traveling for education. That competition magnifies as more institutions extend their reach as well, requiring higher volumes of applicants.



The Pool of Competitors Continues to Widen

Opportunities to Engage



Inquiries Are Deliberate

Prospective students are taking a deliberate approach to their college search, inquiring with purpose. Notably, the trends in inquiries over the last several years closely mirror the trends in enrollment from 2017 to 2021. This approach and close alignment underscore the significance of understanding and leveraging the inquiry stage in the student journey.



Engagement During the Inquiry Stage Is Key

Amid rising competition across every dimension, enrollment declines are inevitable without proactive measures.

The competition is fierce, but there are opportunities for those willing to innovate and connect meaningfully with the college-bound population. In this ever-evolving landscape, institutions that adapt to shifting trends and proactively engage with prospective students will not only survive but thrive.



Further Reading

EAB Resources That Delve Deeper into Demographic & Enrollment Trends

Expand Your Reach With Enroll360 Audiences

As this paper illustrates, the shifting landscape of higher education demands a nuanced understanding of regional demographics, application trends, enrollment dynamics, student mobility, and inquiry patterns. Our commitment to empowering institutions like yours goes beyond insights though—it extends to actionable solutions tailored to your unique needs. For example, in light of the demographic trends discussed in this paper, Enroll360 Audiences excels in helping institutions access and engage with the right student demographics. Student mobility is also evolving, and we can help institutions adapt their strategies to cater to students willing to travel. Whether you seek to connect with regions experiencing growth or understand the preferences of specific student segments, our platform allows you to target and build affinity with college-bound students in these areas and grow your pool of prospects and inquiries.



Machine Learning

We leverage behavioral insights drawn from 6M+ student inquiries in Apply's database to identify leads who are more likely to apply and enroll.



Personalized Search Criteria

Secure leads that match your enrollment goals through customizable filters.

- ✓ Zip Code
- ✓ State
- ✓ HS Graduation Year
- ✓ GPA (minimum and maximum)
- ✓ Areas of Study
- ✓ Gender
- ✓ *And more*



Expansive Reach

Intersect connects you with students in **Naviance**, the nation's largest college, career, and life readiness platform in use by 40% of all US high school students.



Powerful Recruitment Tools

With Intersect, leverage a suite of recruitment resources to raise your brand awareness with Naviance students.

- ✓ View the number of students considering you at each Naviance high school
- ✓ Promote merit-based scholarship opportunities
- ✓ Launch customized messaging against select competitors and majors



Segmented Inquiries

Connect with first-generation, low-income, and CBO-affiliated students via Apply.com

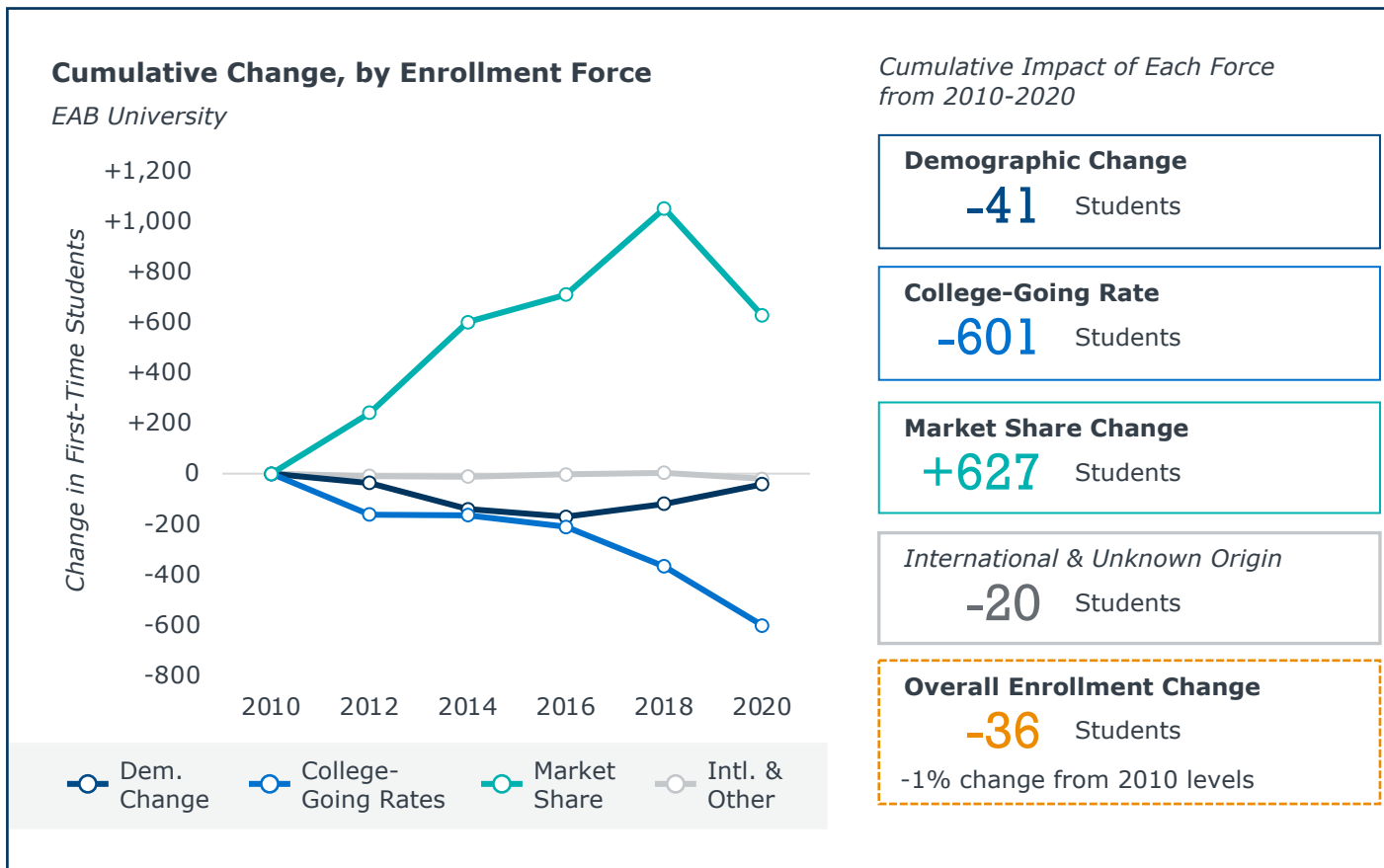


CBO Engagement

Build mutually beneficial relationships with CBO advisers via the nation's largest college access network

Your Institution's Undergraduate Enrollment Outlook

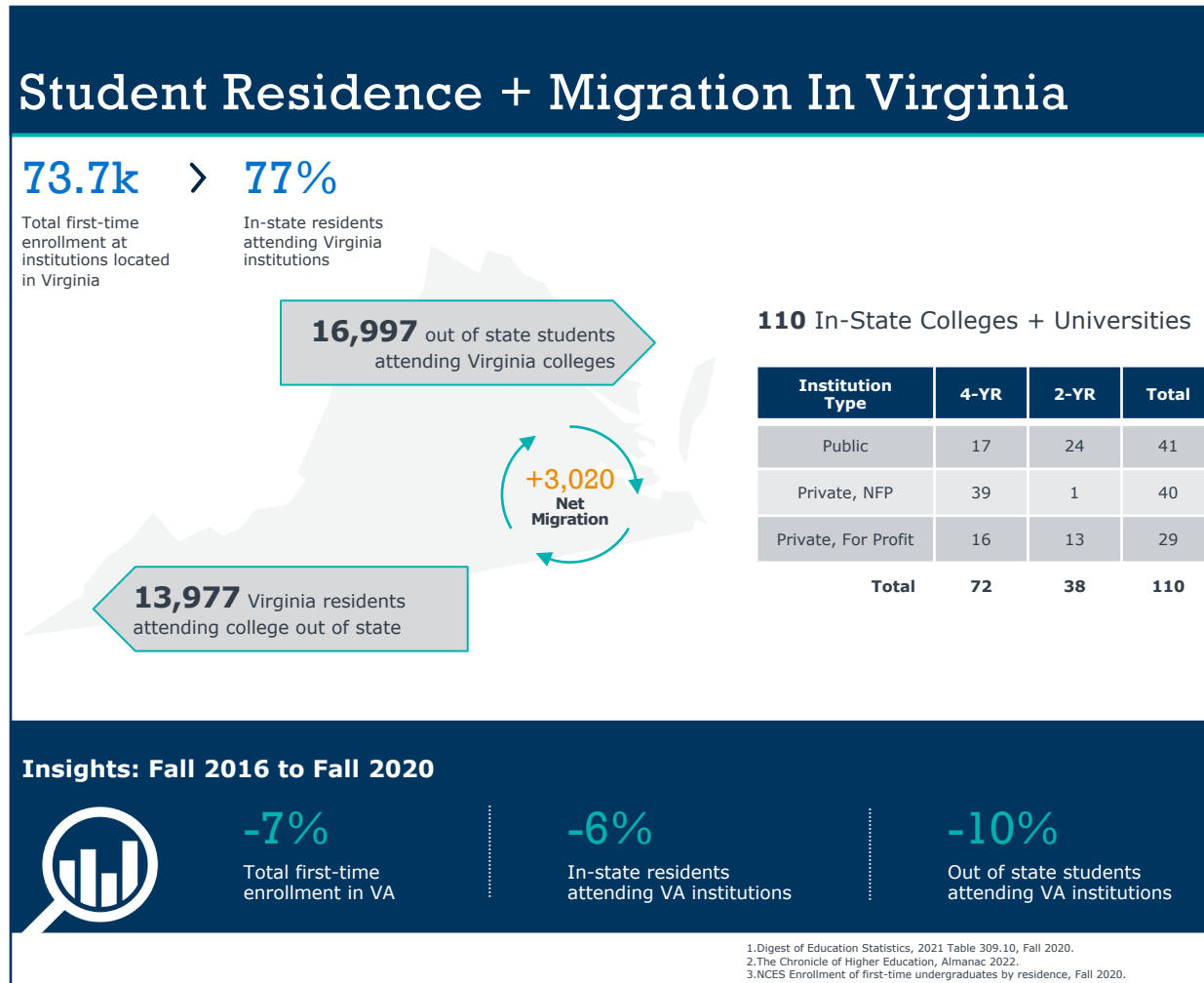
While this paper has explored regional and state-level enrollment forces, you may wonder how these affect your specific institution. For this individualized perspective, have a look at a sample of our customized Undergraduate Enrollment Outlooks. These model future enrollment growth and the relative impact of demographic decline, market share, and college-going for every four-year institution in the US from 2010 to 2035. The example below reveals the cumulative impact of factors like market share and college-going rate changes on "EAB University". As you can see, this university not only weathered adverse market conditions but also achieved remarkable success by capturing market share, offsetting declines in the college-going rate. This analysis, powered by EAB's Strategic Advisory Services, is just one example of the insights offered by EAB Research to transform your enrollment strategy.



Source: EAB Analysis of IPEDS Fall Enrollment Data, WICHE Knocking at the College Door data, and American Community Survey data; EAB interviews and analysis.

State Profiles of the High School Student Landscape

For a more detailed and high-resolution exploration of prospective student demographics, in-state enrollment, and out-migration on a state-by-state basis, we recommend exploring our State Profiles, a comprehensive resource provided by Enrollment Analytics. These profiles offer in-depth data on in-state enrollment and out-migration rates, among other key enrollment and demographic analytics. They can be an invaluable tool for institutions seeking to better understand their engagement with students in their home markets and identify target areas for recruitment strategies. Dive deeper into the data to gain a more nuanced perspective on your institution's regional dynamics.



Unlock Every Recruitment Advantage with Enroll360

Enroll360 Solutions to Outperform the Market at Every Stage of the Funnel



Cultivate



Apply



Aid



Yield

Tailored partnerships that work in concert to generate unmatched search, recruitment, and yield results.

What Makes Enroll360 Solutions Different

Expert Audience Generation



Differentiated Creative



Intelligent Analytics

Enroll360 Products to Elevate Student Awareness and Engagement with Your School

Audiences

Build awareness and influence and grow applications with leads from our expansive ecosystem.



Tours

Engage Gen Z in immersive virtual tours that tell your brand story and build affinity.



Match

Enroll students from all backgrounds with our unique "reverse admissions" model.



Powered by the Leading Student-Facing Platforms





202-747-1000 | eab.com

 @eab  @eab_  @WeAreEAB  @eab.life

ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.