INSIGHT PAPER

College Search Trends Across Space and Time: 2024 Edition

A Deep Dive into Inquiry, Application, and Enrollment Patterns

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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 in specific sectors, regions, and states. 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 trends presented within each section:

SECTION 1

Demographic Trends

- College-age populations already in decline across Midwest and Northeast
- Southeast and Southwest poised for a dip rather than a cliff
- Downward trends in the college-going rate are projected to level off
- Notable exceptions region by region

SECTION 2

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- Overall application growth, but the degree of growth varies by region
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- Many schools growing enrollment despite population declines, while others succumbing to them
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- Demographics shaping the need for out-of-state enrollees
- Private schools attractive but public schools catching up
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- Student interest continuing to shift dramatically to the Southeast
- Demographics driving some market changes, but active strategies matter
- Students considering traveling farther than ever before
- Students inquiring deliberately and earlier than in recent years

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.

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 state where enrollment is growing or shrinking? 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 your enrollment goals, given the successes or challenges revealed in your state, geographic region, and market segment.

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 (2019 to 2024) and through the next five years (2029).

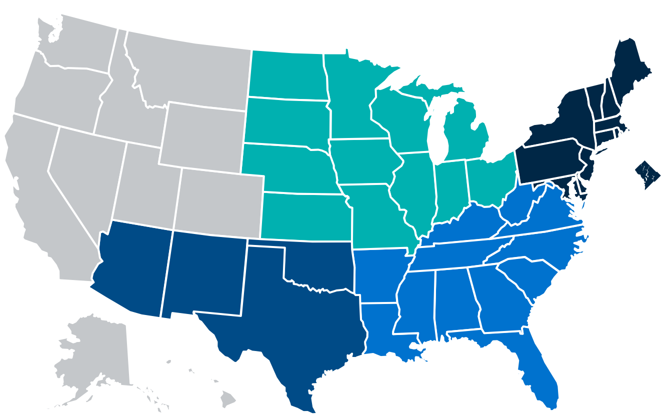
The five-year stretch in the recent past provides us with the demographic context for the latest data on applications and enrollment, while the next five years provides context for the conditions that schools will face in the near future. This will establish the underlying conditions shaping enrollment trends from region to region.

2 3 4 The three sections that follow will present various **application and enrollment trends** across regions and market segments in the recent past (2017 to 2022), 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.

5 The fifth section charts **current trends in student inquiries** to explore what is shaping the college-search process for prospective students in the most recent incoming classes (2022 to 2024).

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 Enroll360 Audiences platforms that are more current than the latest admissions data. This allows us to examine more current trends and how they fit with the trends observed in applications and enrollment for 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.*

Use These Regional Trends for Informed Enrollment Planning

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 states, regions, and market segments. For example, if your school's performance is lagging behind the overall performance in your state, 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.

1

Contextualize your institution's enrollment performance across different geographic areas and market segments.

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 for campus leaders.

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

This paper aims to offer an analysis of intermediate-scale trends that bridge the gap between the idiosyncratic studies of individual schools and coarser nationwide reports. Analyses at this scale reveal patterns and shifts that might be missed or inactionable at the other scales, providing a nuanced understanding of how various factors influence student behaviors and enrollment outcomes. For enrollment leaders, insights from these intermediate trends can inform strategies that are broadly applicable yet still nuanced enough to be actionable.

Demographic Trends from 2019 to 2029

Population and 4-Year College-Going Data for High School Graduates by State and Region

SECTION 1

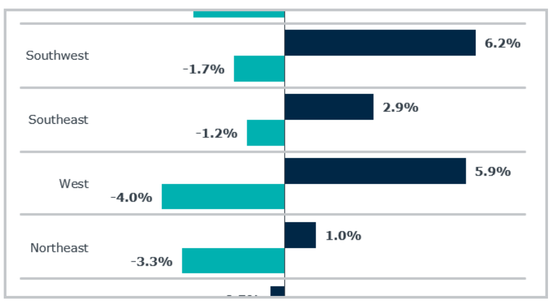
Additional Context for Familiar Demographic Trends

The demographic or enrollment “cliff" has been a topic of intense discussion in higher education for many years now. This significant decline in the number of high school graduates, stemming from lower birth rates starting in the 2000s, is expected to impact college enrollments sharply by 2025—and arguably already has begun in some areas. While much of the existing research focuses on longer-term changes through 2035, this section aims to add more context to this well-known story.

1

Recent Past and Near Future Focus

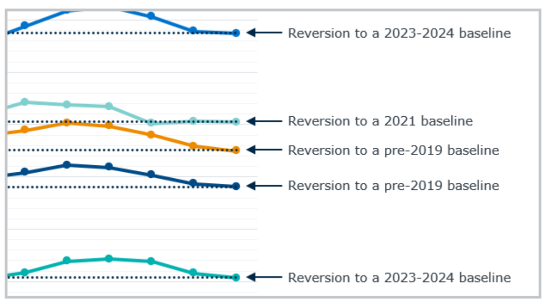
Rather than projecting far into the 2030s, our analysis looks at the recent past and the immediate future—covering the last five years (2019 to 2024) and projecting the next five years (2024 to 2029). This shorter time frame provides more practical insights for strategic planning.



2

Contextualizing Future Population Levels

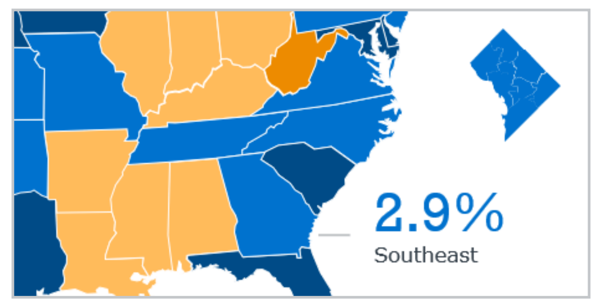
We show where the declining populations of 2029 will align with past population levels. For instance, while the Southeast’s population in 2029 will revert to 2023 levels, the Midwest will face a more significant decline, reverting to pre-2019 levels. These reference points put the changes into real context, as well as highlight the varying severity of the demographic shifts across regions.



3

Granular Regional Insights

Our analysis dives deeper into the data by showing the state-by-state changes in the recent past and near future. This reveals more granular patterns in those periods, such as a cluster of states in the Southeast that have already experienced population losses. These insights can help institutions understand and respond to localized demographic changes.



At the Edge of the 'Demographic Cliff'

Demographics Structure Markets

Underlying all college-search trends are the demographic trends of young adults throughout the country—the prospective student pool. The impending drops in the college-age population in 2025 have been a widely discussed concern for enrollment offices nationwide. When we chart these trends over the last five years and through the next five, we can glimpse how that component of the demand for higher ed has evolved—and will continue to do so.

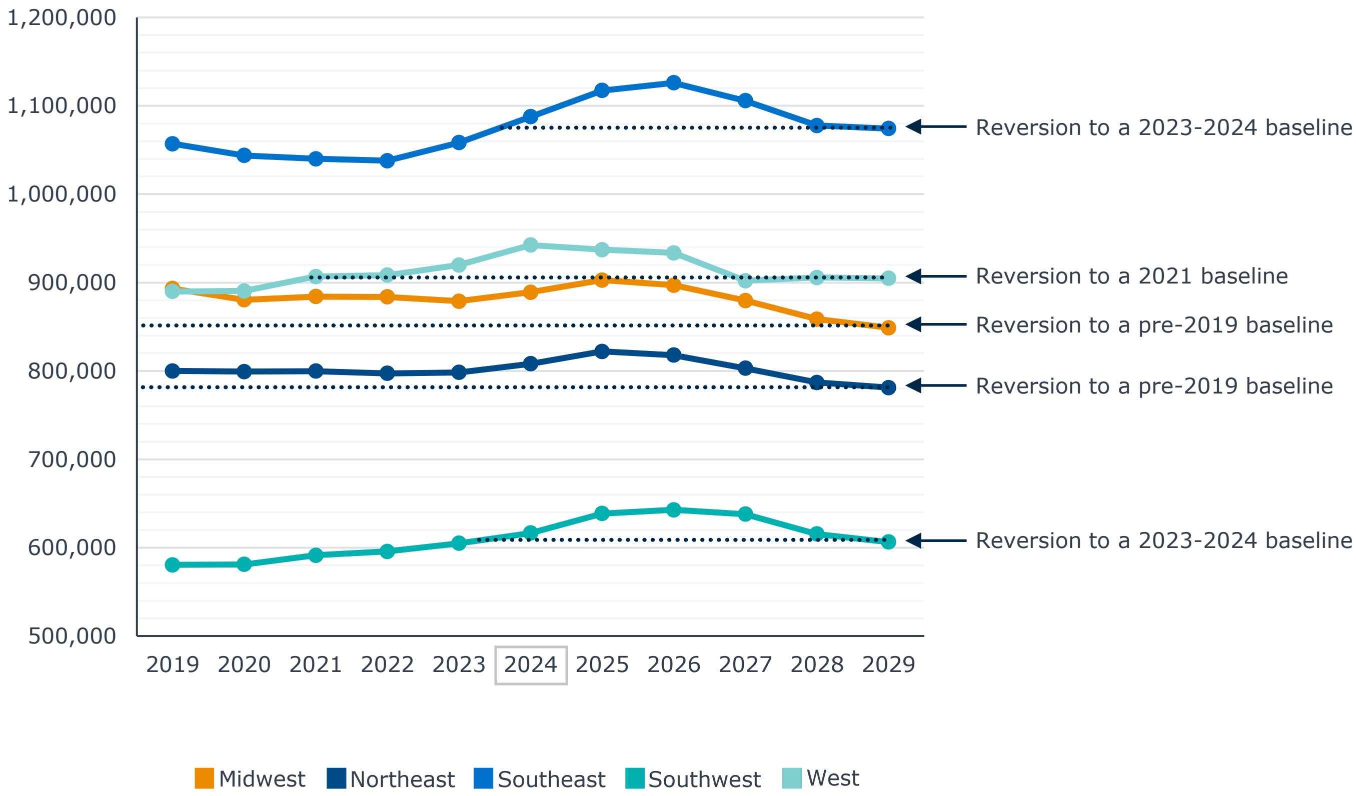
A Dip in Some Regions, a Leveling Off in Others

Charting the 18-year-old population makes it obvious that, while most regions' populations will indeed peak in the next several years, the precise trajectories vary among regions. In the West, the population has already peaked, while the population in the Southeast is not due to peak until 2026.

More importantly, though, is the endpoint for these looming changes: while the Midwest and Northeast are set to shrink lower than they have in recent history, the other regions are all on track for populations that level off to where they were in just the last year or two.

Regional Variation in the Scale of Population Change over Time

Population of U.S. High School Graduates from 2019 to 2029



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

Schools Will Have to Do 'Less With Less' in the Near Future

A Mix of Growth and Stagnation in the Recent Past

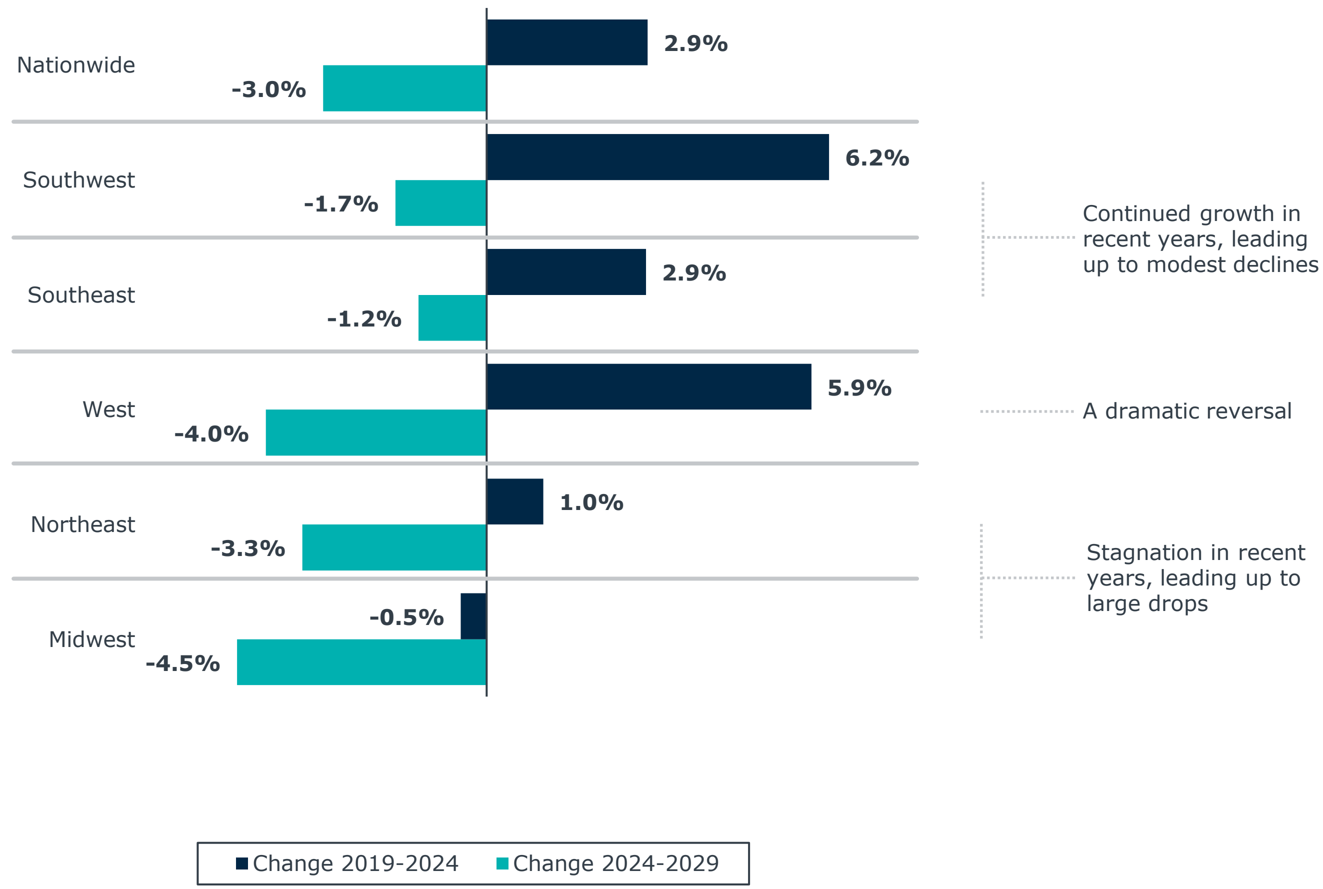
Net changes that have already taken place (in dark blue) show a mix of continued growth in some areas (Southwest, Southeast, and West) as well as stagnation in others (Northeast and Midwest), well ahead of the "cliff" in 2025. These early contractions in the population have, along with other factors, already led to increasing competition and even closures across markets as schools scramble to adjust to the changes, particularly in the Northeast and Midwest.

Varying Degrees of Decline in the Near Future

If modest growth of only 1% in the Northeast or a miniscule decline in the Midwest have contributed to these intensifying market conditions, then the fact that all regions will experience a decline from today's population in the near future (even if some regions are just reverting to the population levels of just a couple years ago) shows how much this competition is likely to increase. No regional markets will be able to rely on natural growth to fuel enrollment, leading most to have to get by with doing less with limited resources.

A Reversal of Positive Trends and a Deepening of Negative Trends

Percentage Change in the Population of U.S. High School Graduates from 2019 to 2024 and 2024 to 2029



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

Three Clusters of Early Decline in High School Graduates

These regional changes charted on the preceding page can belie nuances at the state level though. These include continued growth in parts of the Northeast and Midwest and even significant decline in parts of the Southeast, which forms the third of three clusters of declining populations in the past five years that sharply stand out.

Clusters of Decline in the Northeast and Midwest

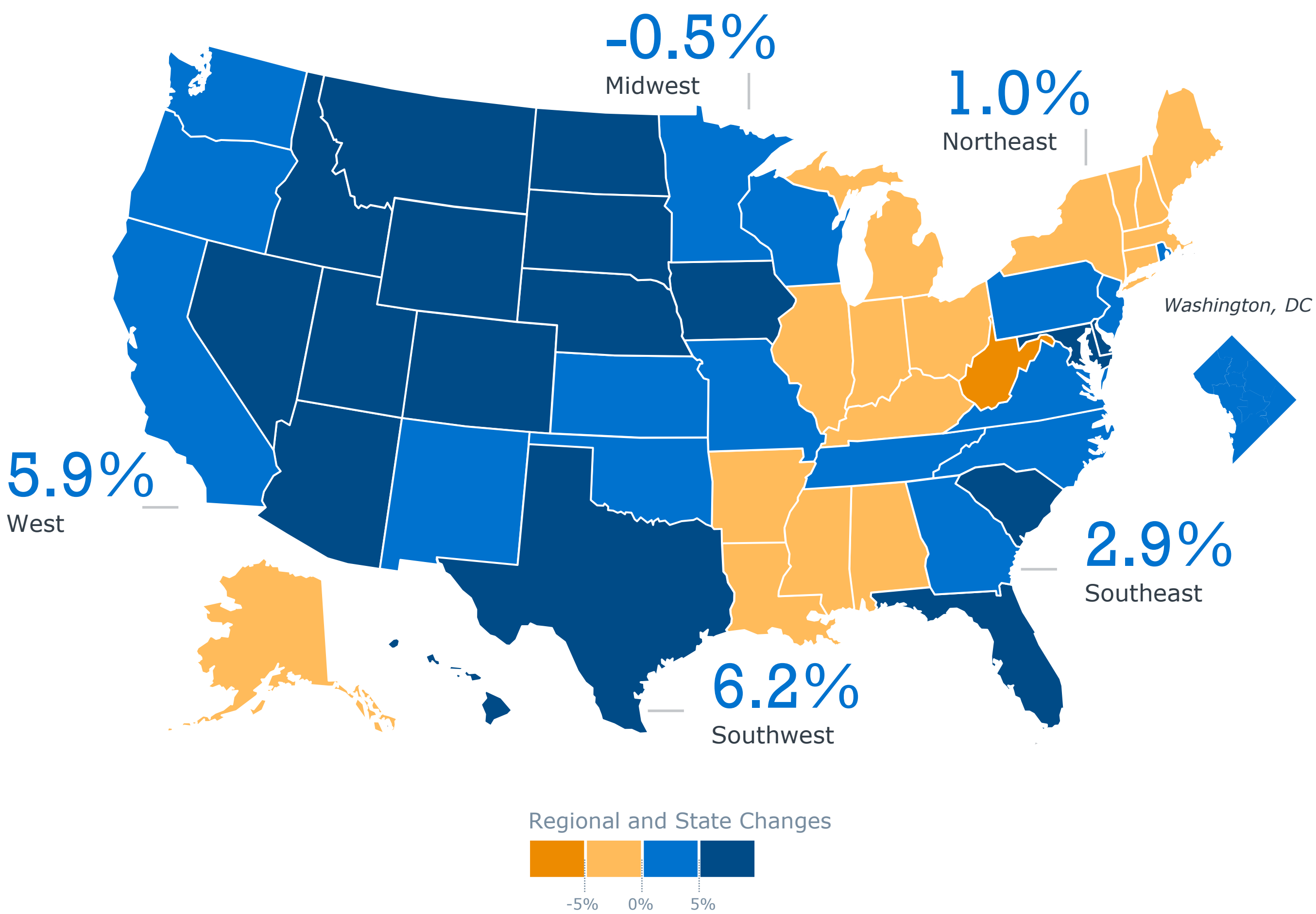
While not every state in the Northeast or Midwest shrank, it's obvious that the eastern states in the former region and the northern states of the latter have been ahead of the declining demographic curve for quite some time. This no doubt has driven trends in closures and consolidations in these regions, particularly among small or regional schools that rely heavily on local markets.

Declines in the Southeast Too

The shrinking populations across many of the inland and gulf states of the Southeast stand out as well, especially given the region's overall growth over the last half-decade. Clearly much of the regional population loss was counterbalanced by the outsized growth seen in the large state of Florida.

State-by-State Variation in the Recent Changes of the College-Age Population

Percentage Change in the Population of 18-Year-Olds from 2019 to 2024



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

Florida Grows While California (and Most of the Country) Shrinks

Broad Declines on the Horizon

Looking at the changes in each state over the next five years shows just how broad the demographic decline we've come to expect will be.

Declines of 0 to 5% in most places over five years might not be as precipitous as a cliff, but if the increasing competition of the last five years is anything to go by (especially in the Midwest and Northeast), then it's clear that competition will only get fiercer as nearly every local market sees some dip in the population of high school graduates.

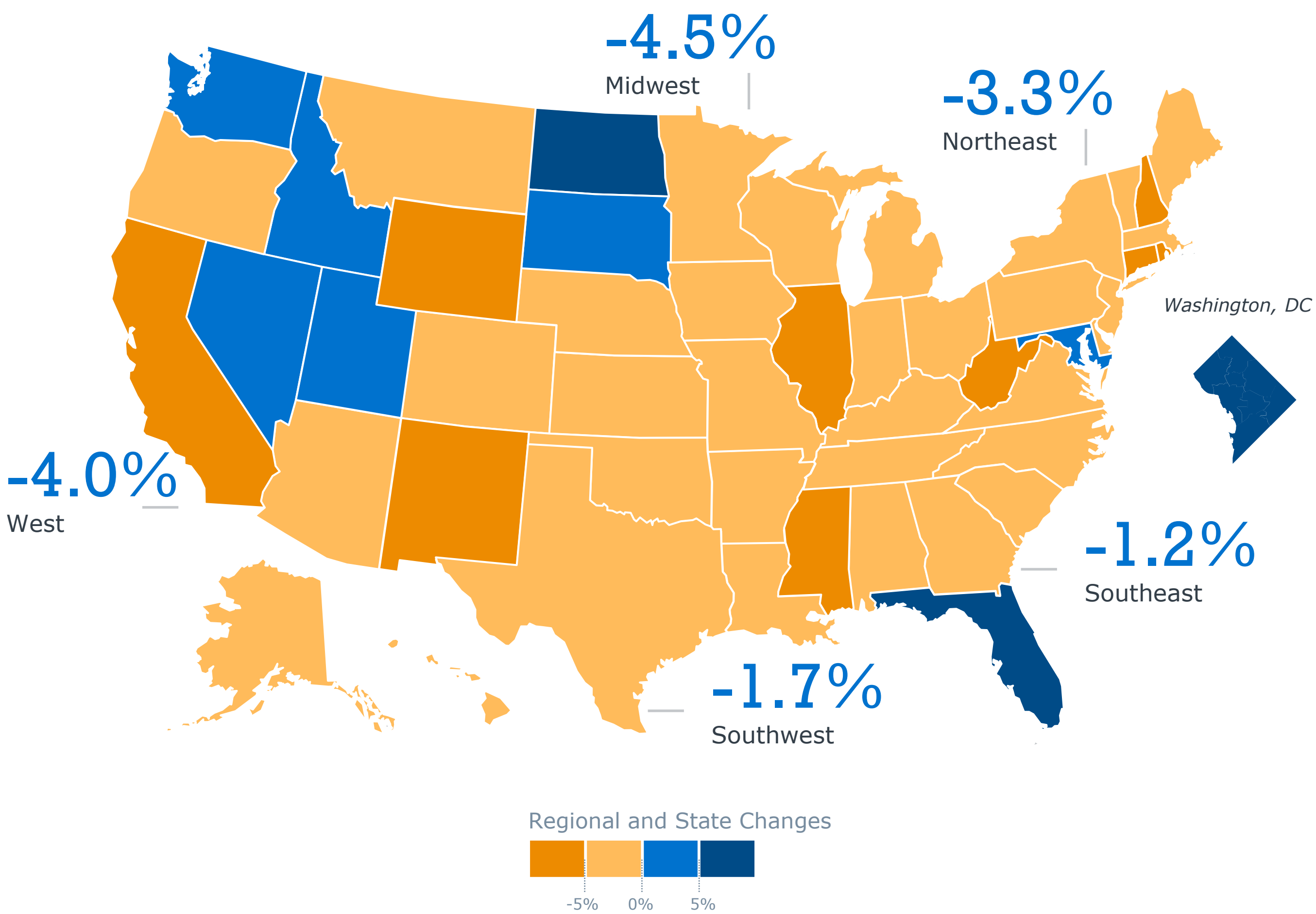
Few Areas of Projected Growth

If anything, the states poised to continually grow stand out even more, including a couple of midsize states, such as Washington and Maryland.

Florida, which is already quite large, is poised to truly shape both the regional and national market, though, given the strong growth it's predicted to maintain in a sea of dwindling markets. Maryland looks this way, althrough to a lesser extent, given its position as an island in what will have been a region whose population has been declining for a decade or more by 2029.

State-by-State Variation in the Future Changes of the College-Age Population

Projected Change in the Population of 18-Year-Olds from 2024 to 2029



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

College-Going Rates Have Fallen but Might Level Off

Small-but-Significant Effects

Tracking the college-going rate in addition to the population is essential, especially in this period characterized by less confidence in the value of higher education. Even small changes to this rate, such as the 2% drop in the Northeast since 2019, can have a significant impact on the actual population of college-going students. The effects ripple outward from there, ultimately affecting all markets.

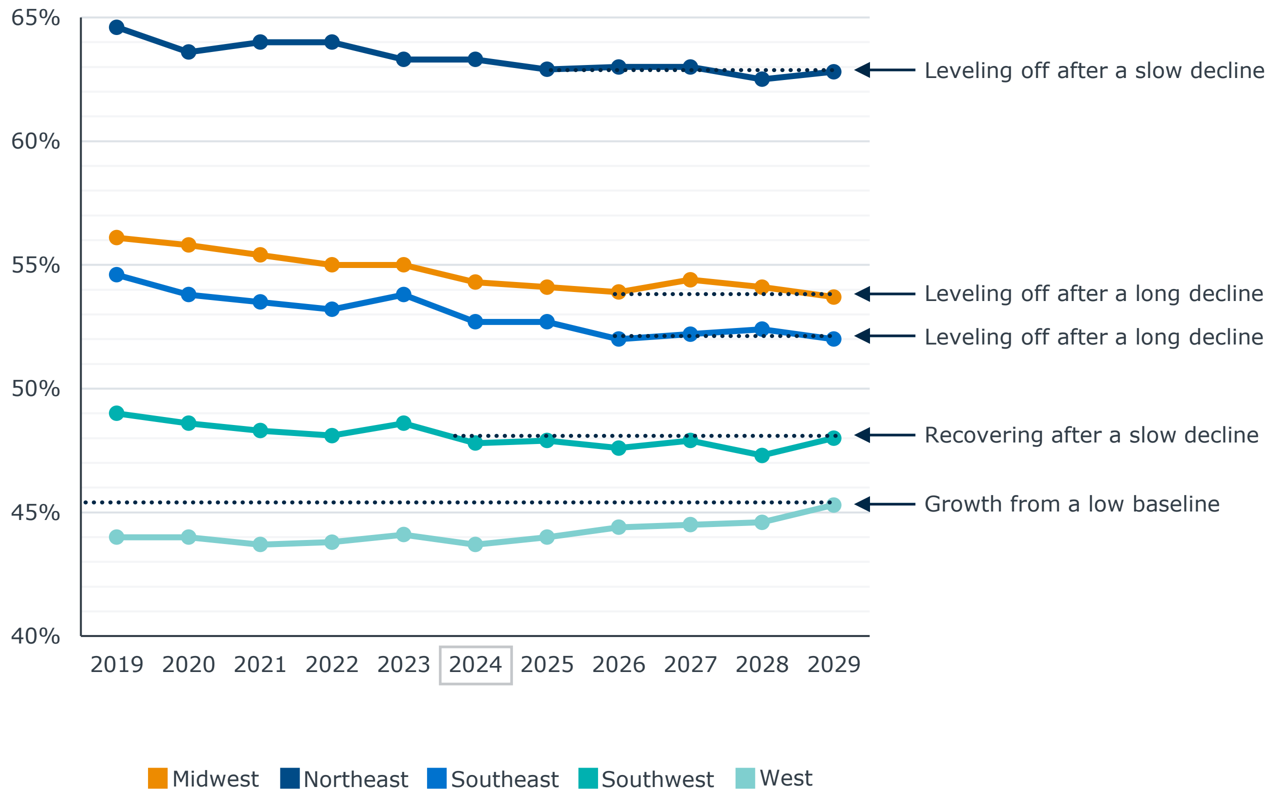
Universal Drops in College-Going

While every region started with a unique baseline, each shrank over the last five years. This is reflective of the broader trend we've seen in what EAB refers to as "non-consumption" of higher education among more and more young people.

This trend could level off in the next five years (or even reverse in the West), but it still represents a net contraction across markets that will exacerbate the broader demographic trends. On the bright side, this is more changeable than the underlying population dynamics, demonstrating how important it is to create a sector-wide affirmative case for higher education.

Regional Variation in the College-Going Rate over Time

4-Year College-Going Rate[1] for High School Graduates from 2019 to 2029



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

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

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Application Trends from Fall 2017 to 2022

Application Data for First-Time Undergraduates at 4-Year Institutions by State, Region, and Institutional Segment

SECTION 2

High Application Growth, Interrupted Briefly by the Pandemic

When we look at application data going back five years, there are strong upward trends in every region despite demographic declines in some areas. Many barriers have come down over this period, which has helped promote this growth (e.g., test-optionality, simplified applications). Therefore, we're going to examine what constitutes the "new normal" for application growth across different regions and school segments in this section.

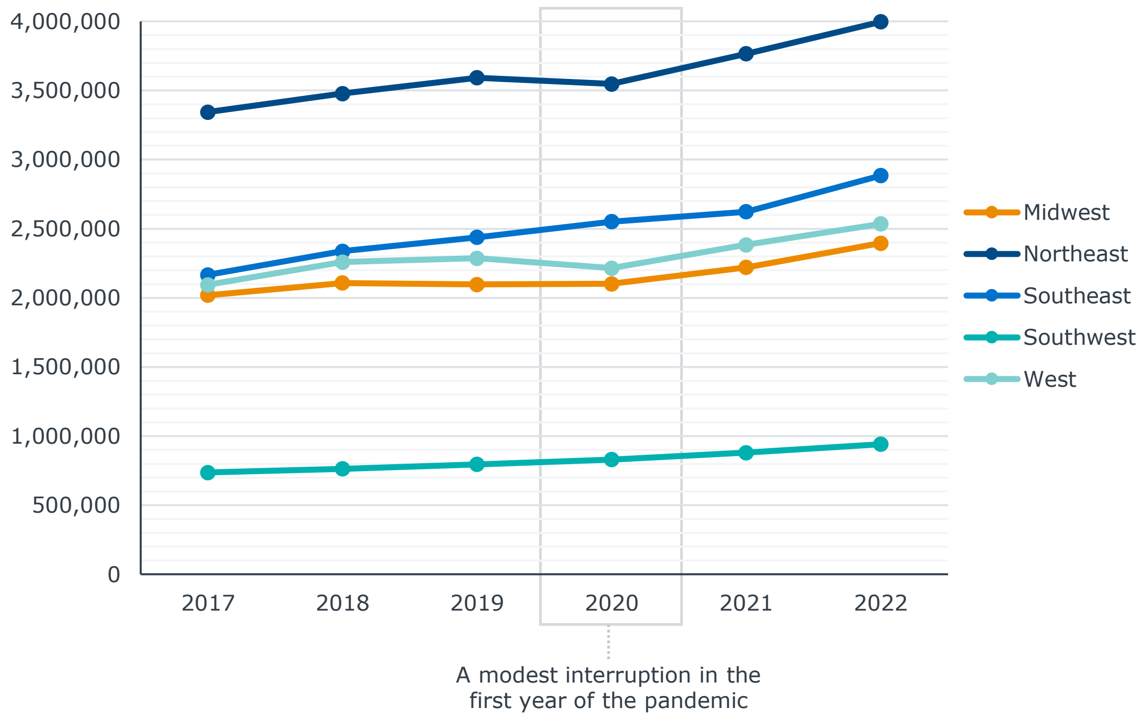
Accelerated Growth Coming Out of the Pandemic

The data show that the growth goes back at least to 2017, though it has differed somewhat from region to region. The most notable differences occurred at the outset of the pandemic, when applications leveled off or declined outside of the southern regions. However, growth has continued to accelerate dramatically coming out of that year. It's noteworthy, given their diverging population trends, that the Northeast and Southeast regions are both reaping many of these gains.

We'll explore these trends and their enrollment implications in more granular detail, since a prospective student can apply to many schools but only enroll at only one at the end of the day.

Regional Variation in Application Volume Over Time

Number of Applications for 4-Year Institutions by Region from 2017 to 2022



Year-over-Year Percentage Change in Applications for 4-Year Institutions by Region from 2017 to 2022

Region	*2017 to 2018*	*2018 to 2019*	*2019 to 2020*	*2020 to 2021*	*2021 to 2022*
Midwest	+4.3%	-0.4%	+0.2%	**+5.7%**	**+7.9%**
Northeast	+4.0%	+3.3%	-1.2%	**+6.2%**	**+6.1%**
Southeast	**+7.9%**	+4.3%	+4.6%	+2.8%	**+10.0%**
Southwest	+3.6%	+4.3%	+4.3%	**+6.0%**	**+6.9%**
West	**+7.8%**	+1.2%	**-3.1%**	**+7.7%**	**+6.3%**

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

Southeastern States Are Running Way Ahead of the Pack

High Baseline Growth

Even when we zoom into the state-level growth in applications, we see that high growth was widely enjoyed over those five years. In fact, mean statewide growth was 24% in that period. This is one clue that we need a new scale for what constitutes "normal" or "healthy" application growth. In this new normal, it's about more or less growth rather than growth versus decline.

Clusters of Outsized Growth

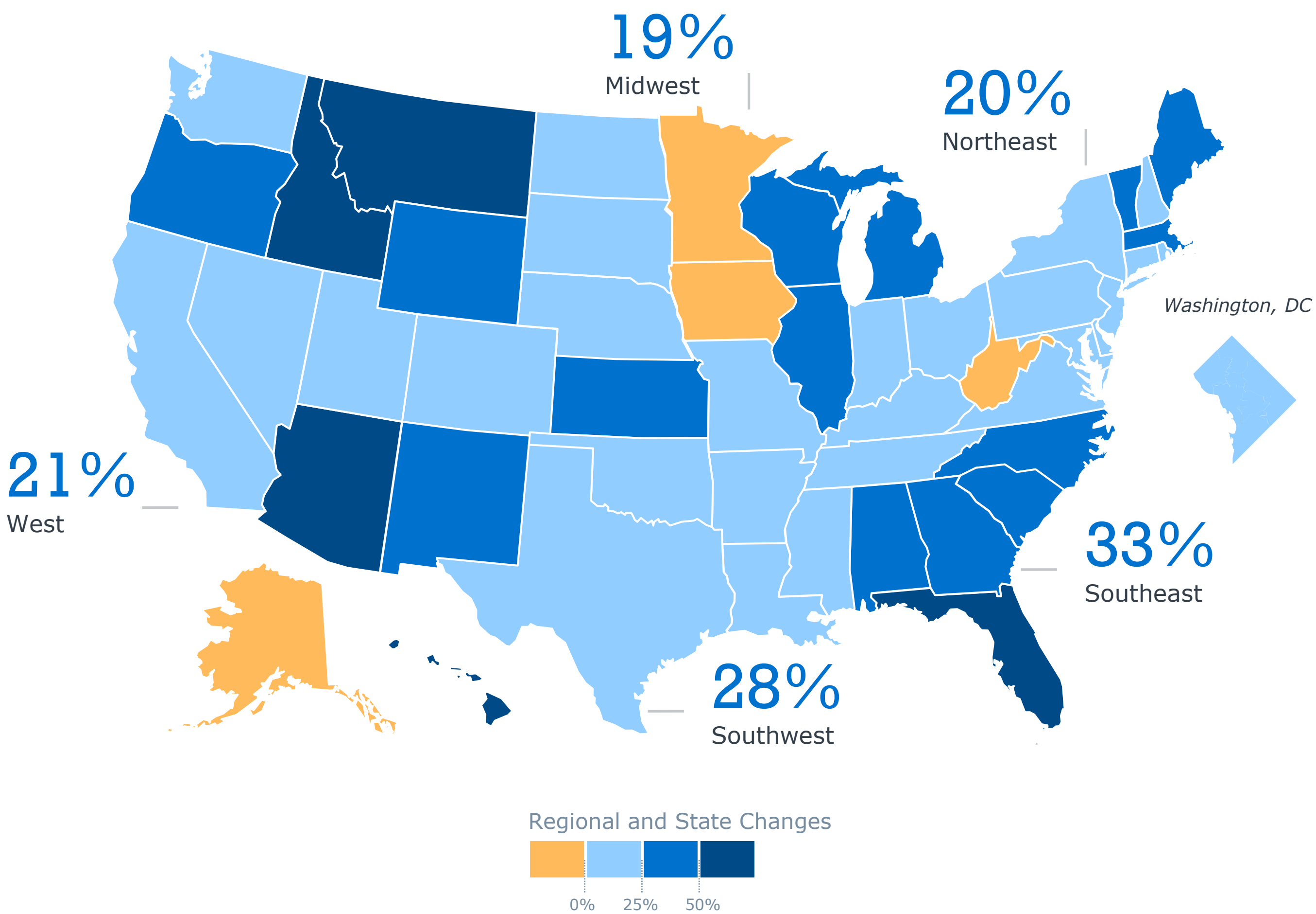
States with above-average levels of growth are somewhat clustered in each region, particularly in the Southeast. In that region, Florida leads with a stunning 73% growth in application volume across schools there since 2017, followed closely by Georgia, Alabama, and the Carolinas.

Areas of Dangerous Decline

There are a few states that lost application volume, though, which bodes ill for those markets. When mean growth is nearly 25%, any decline cannot be rectified with any realistic increase in yield. In the Midwest, the decline is especially interesting given the comparative growth in some neighboring states there (e.g., MN vs. WI).

State-by-State Variation in College Application Volume

Percentage Change in the Number of Applications for 4-Year Institutions from 2017 to 2022



Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

Schools in Many Areas Offset Demographic Loss with Market Share Gains

How much do these changes overlap with the change in population? This bivariate map sorts states into categories depending on whether the volume of applications schools across each state received had above-average or below-average growth since 2017 and whether the college-going population[1] in the state grew or declined.

Success Across the South

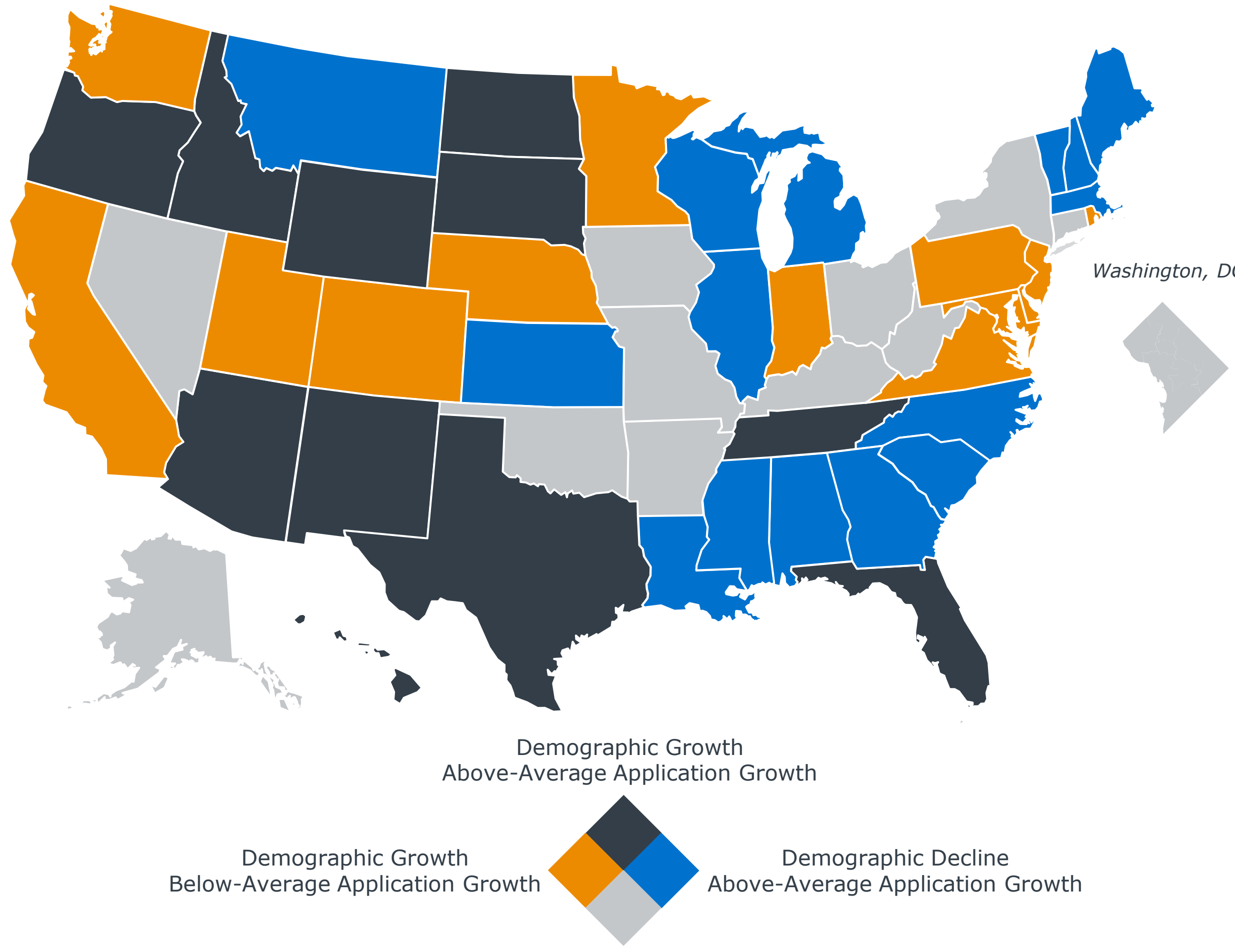
The large growth of applications in states such as Florida, Texas, and Arizona (black) are in line with population growth over the same period. However, the outsized growth in southeastern states (and in New England as well) where the population has dwindled (blue) tell a striking story about their ability to capture market share.

Challenges Throughout the Northeast, Midwest, and West

While schools in some of these states were able to offset demographic losses and vigorously grow applications (e.g., MA, VT, WI, IL, in blue), and some benefited from demographic growth (e.g., OR, ND, in black), many more were unable to keep pace with application growth despite experiencing demographic growth (e.g., CA, WA, MN, IN, PA, NJ, in orange).

Little Overlap Between the Application and Demographic Trends

The Overlap Between Changes in Applications and Demographics[1] from 2017 to 2022



1) The combined change in the population of U.S. high school graduates and the college-going rate.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022; 10th Edition WICHE Knocking at the College Door K12 Data; Grawe, Nathan, *The Agile College* (HEDI data file).

Large Schools Have Continued to Draw an Outsized Share of Applications

Large Schools Are Dominant

The fact that large schools are scooping up more of an increasingly competitive market is brought into full focus when the available data are charted over the last five years. Except for large private schools in the West, large schools in general are doing quite well, even in the Northeast and Midwest, where the growth in application volume has flagged somewhat overall.

High Growth in the Southeast

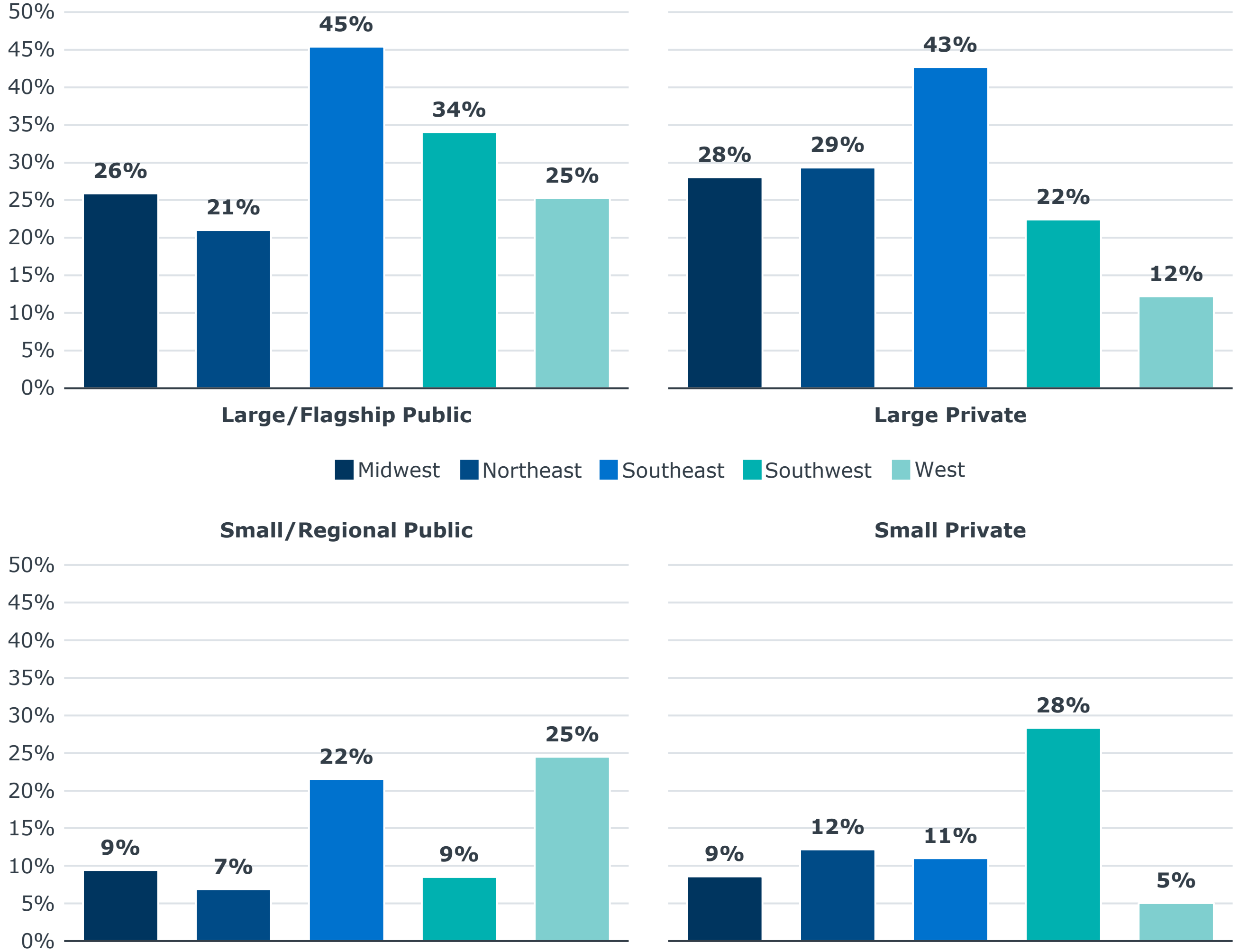
In what will be a recurring trend in this paper, the Southeast stands out in all segments but small private schools, though they show some relative strength. Remarkably, even small or regional public schools show strong growth overall.

Unique Successes in the West and Southwest

Small or regional public schools in the West and small private schools in the Southwest stand out as outliers in their respective segments, showing not just relatively high growth for those segments but above-average growth overall. This underscores the importance of regional contingencies when it comes to potential performance in recruitment.

Application Growth Is Not Evenly Distributed Across School Segments

Percentage Change in Applications for 4-Year Institutions by Segment[1] and Region from 2017 to 2022



1) School size is determined by whether it enrolled more or fewer than 800 first-time full-time students in 2022.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

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

Degrees of Application Growth Make a Meaningful Difference

While it might seem inconsequential to compare what amounts to more or less growth, these differences have important implications for bottom-line enrollment. 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 2022 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 selectivity.[2]

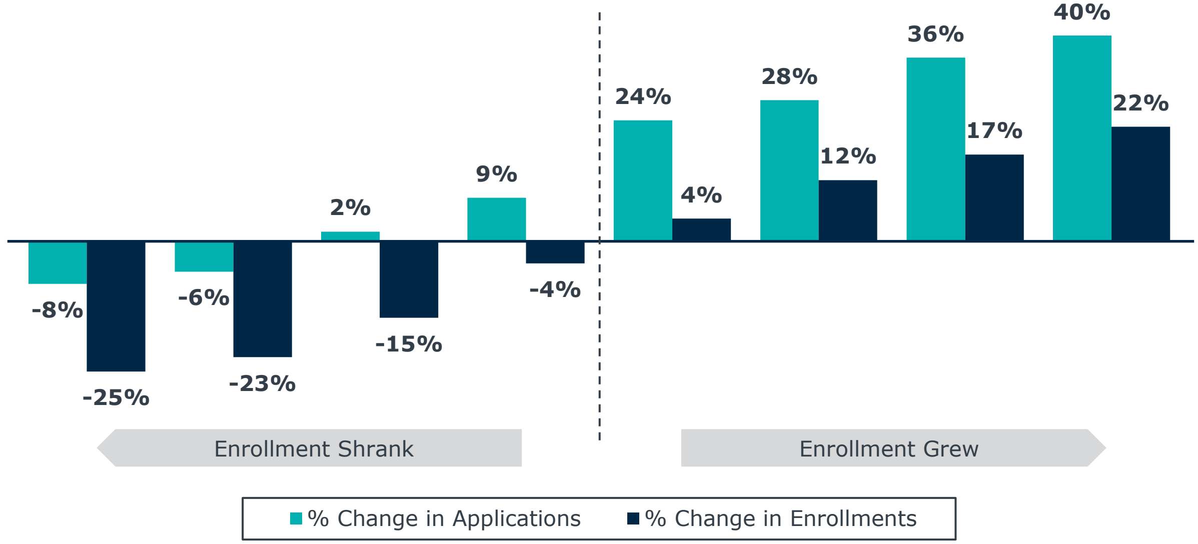
A Volume-Based Imperative

With such broad application growth, is it worth using scarce resources to drive further application growth? 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, in the next section we'll see how that doesn't translate to enrollment success.

Application Volume Drives Enrollment Growth

Change in Application Volume for 4-Year Institutions from 2017 to 2022 by Enrollment Growth[1]

n = 671



24%
Average application growth needed over five years for only modest enrollment growth

4.4%
Year-over-year application growth needed to break even on enrollment

1) Schools are split into those whose enrollment grew or shrank, then each group is split into quartiles, respectively.
2) [What does application growth mean for enrollment outcomes? | EAB]

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

Enrollment Trends from Fall 2017 to 2022

Enrollment Data for First-Time Undergraduates at 4-Year Institutions by State, Region, and Institutional Segment

SECTION 3

Few Regions Have Truly Recovered from Pandemic-Era Enrollment Losses

Uneven Enrollment Growth

When we look at the year-over-year changes, enrollment outcomes look very different from the broad application growth that we saw. We have a similar pandemic dip and subsequent hangover, but while enrollment grew everywhere in the following year, growth in most regions was flat or down compared with 2017. Much of this tracks with where we observed the highest growth in applications, supporting the fact that above-average growth is needed to drive even modest enrollment.

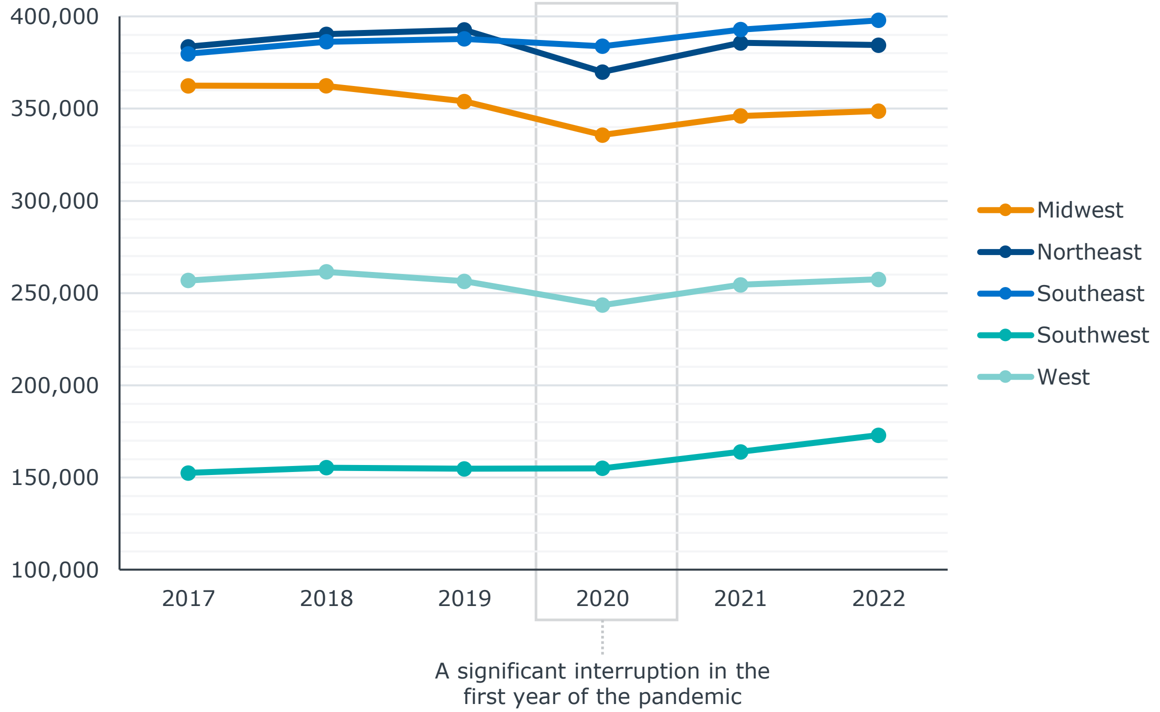
A Newly Dominant Southeast

As we saw with application growth and will continue to see throughout this paper, the Southeast truly stands out. Most notable is how it overtook enrollment in the previously dominant Northeast in fall of 2020, suffering only a small dip at the outset of the pandemic. Schools in the Southwest have also done well, with strong growth continuing after only a momentary hiccup in 2020. By comparison, the Midwest looks much less well off.

We'll explore how these trends vary by state and segment, as well as how much of a driving force local demographics were for enrollment.

Regional Variation in Enrollment Volume over Time

Number of Students Enrolled for 4-Year Institutions by Region from 2017 to 2022



Year-over-Year Percentage Change in Enrollment for 4-Year Institutions by Region from 2017 to 2022

Region	*2017 to 2018*	*2018 to 2019*	*2019 to 2020*	*2020 to 2021*	*2021 to 2022*
Midwest	-0.1%	**-2.3%**	**-5.1%**	**+3.1%**	+0.8%
Northeast	+1.8%	+0.6%	**-5.8%**	**+4.3%**	-0.3%
Southeast	+1.7%	+0.4%	-1.0%	**+2.3%**	+1.3%
Southwest	+1.9%	-0.4%	+0.2%	**+5.7%**	**+5.5%**
West	-1.8%	**-2.0%**	**-5.1%**	**+4.6%**	+1.2%

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

Enrollment Losses in Midwestern States Stand Out Sharply

State-by-State Enrollment Trends Are Tightly Clustered

Even when we examined enrollment at the state level, the trends were highly regional. Most midwestern states (along with the western states on their border) fell way behind. Meanwhile, schools in southeastern and southwestern states charged ahead with the highest growth rates in the nation. Only the states in the Northeast and West showed mixed outcomes, with some states doing well while their immediate neighbors shrank.

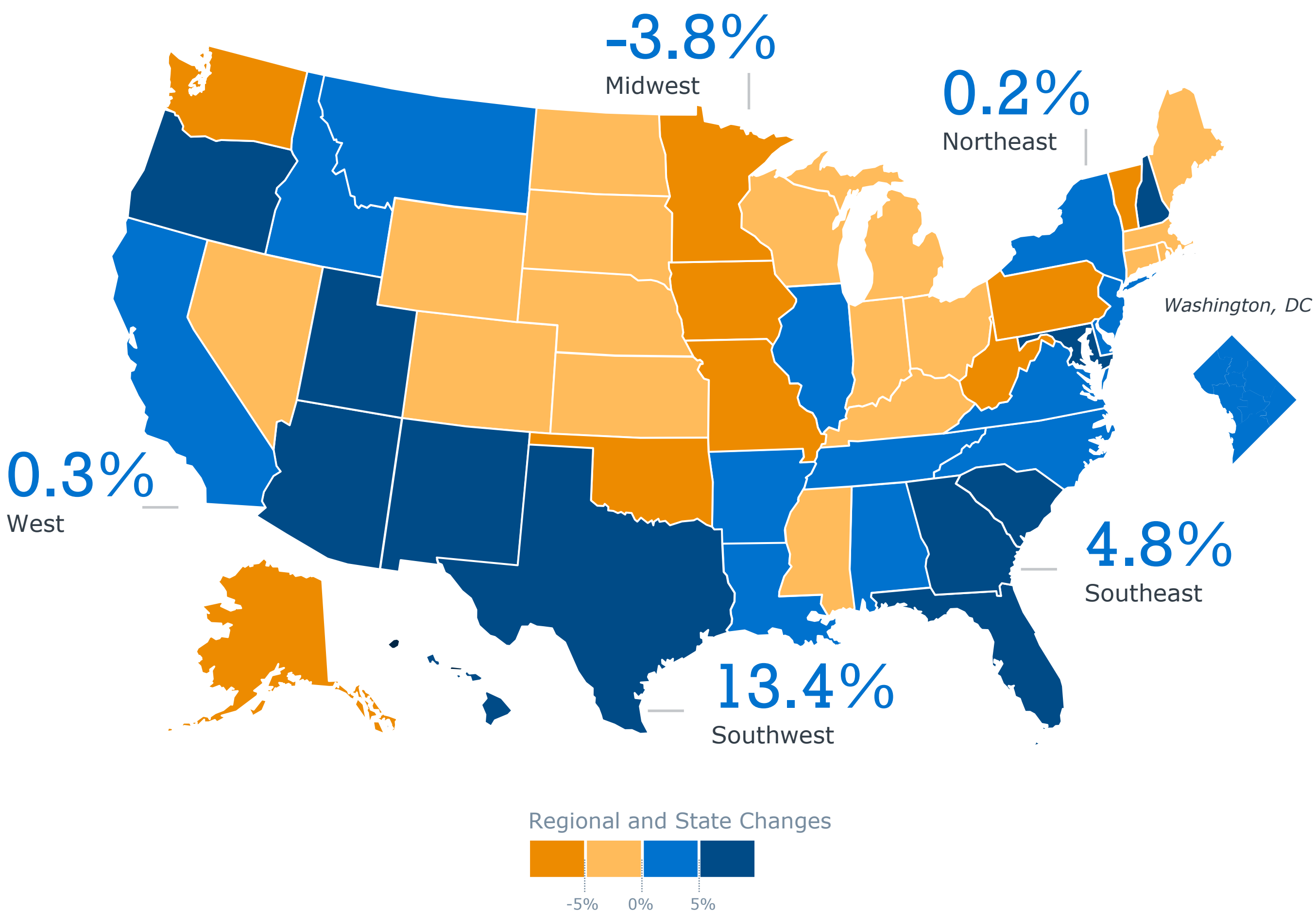
Students Are Choosing the South

The enrollment success in southern states reaffirms what we cited at the end of the last section, which showed that outsized application growth is now necessary for enrollment growth. These southern states are where application growth was highest (>25%), and they are the same states where schools were able to maintain or grow their enrollment. Broadly shared application growth across the country doesn't translate to enrollment. After all, students can attend only one school.

Let's also look at how much the demographic shifts since 2017 might have driven these trends.

State-by-State Variation in College Enrollment Volume

Percentage Change in Enrollment for 4-Year Institutions from 2017 to 2022



Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

Schools in the Southeast Are Successfully Navigating Demographic Dips

Overlapping Demographics and Enrollment in 59% of States

The direction of demographic trends overlapped with that of enrollment in over half of all states nationwide, which shows just how much enrollment is downstream of shifts in population as well as changes in application volume. We see this in the growth across many states in the West, as well as in the losses in the Midwest and Northeast.

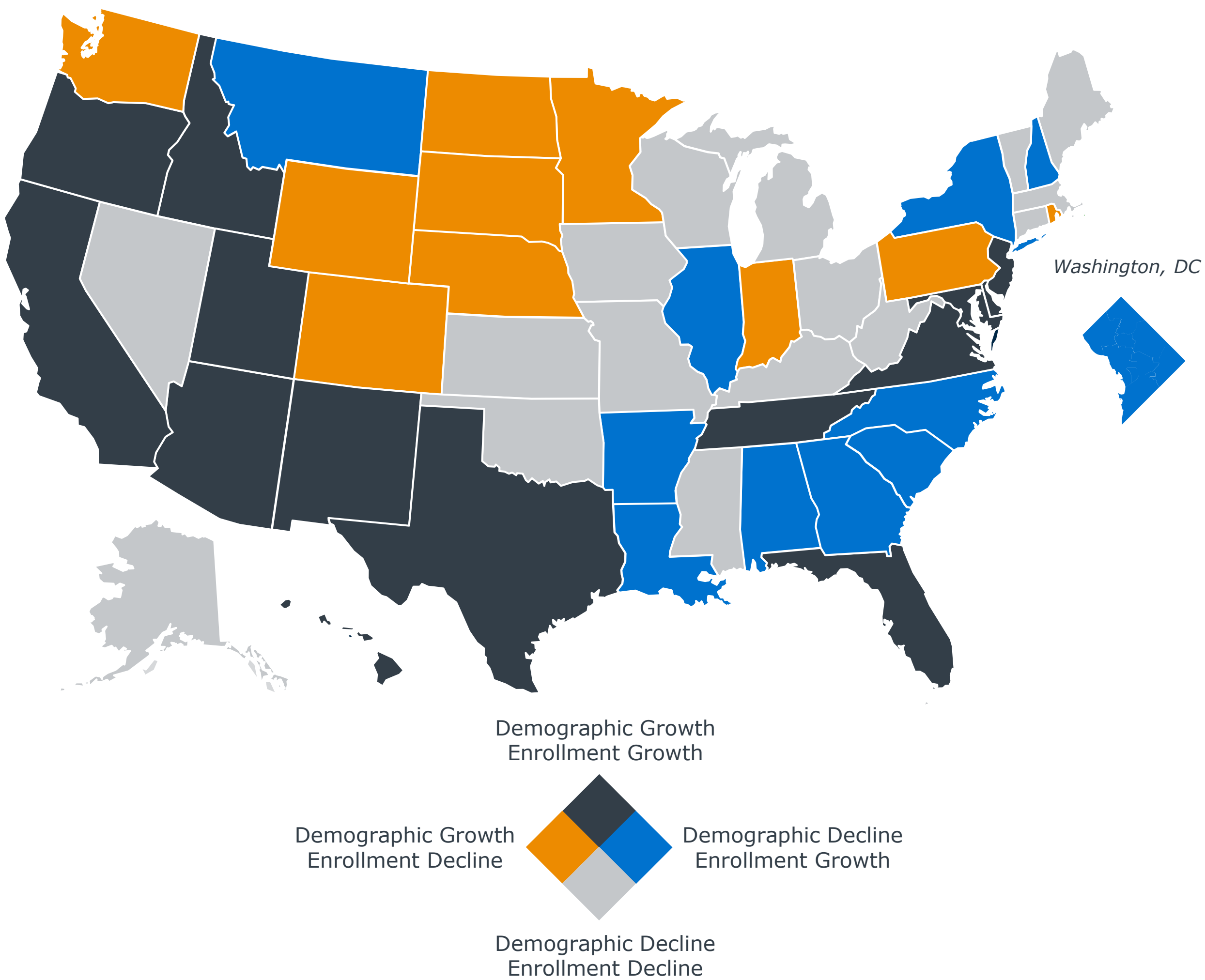
Market Shifts Drive a Lot of Changes to Enrollment as Well

However, much of the decline in enrollment for states in the Midwest (e.g., IN, MN, ND) occurred on a backdrop of rising student populations. This points to a possible exodus of students from the region, which we'll explore more in the next section (i.e., Migration).

The rampant success in enrollment found in southeastern states shows the opposite trend, since their growth cannot be attributed simply to rising populations. While enrollment in a few states there did grow (e.g., FL), most of these states grew their enrollment despite shrinking student populations. This suggests that they are attracting students from other regions.

Demographic Shifts More Closely Overlap Changes in Enrollment than in Applications

The Overlap Between Changes in Enrollment and Demographics[1] from 2017 to 2022



1) The combined change in the population of U.S. high school graduates and the college-going rate.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022; 10th Edition WICHE Knocking at the College Door K12 Data; Grawe, Nathan, *The Agile College* (HEDI data file).

These Shifts in Enrollment Aren't Spread Equally Across School Segments

Market Share Is Shifting Sharply to Large Schools

When we compare the enrollment trends of large and small schools, the differences could not be more pronounced. Their enrollment trajectories from 2017 to 2022 diverged sharply, with large schools in both sectors having grown their enrollment significantly in most regions, while smaller schools contracted in every region.

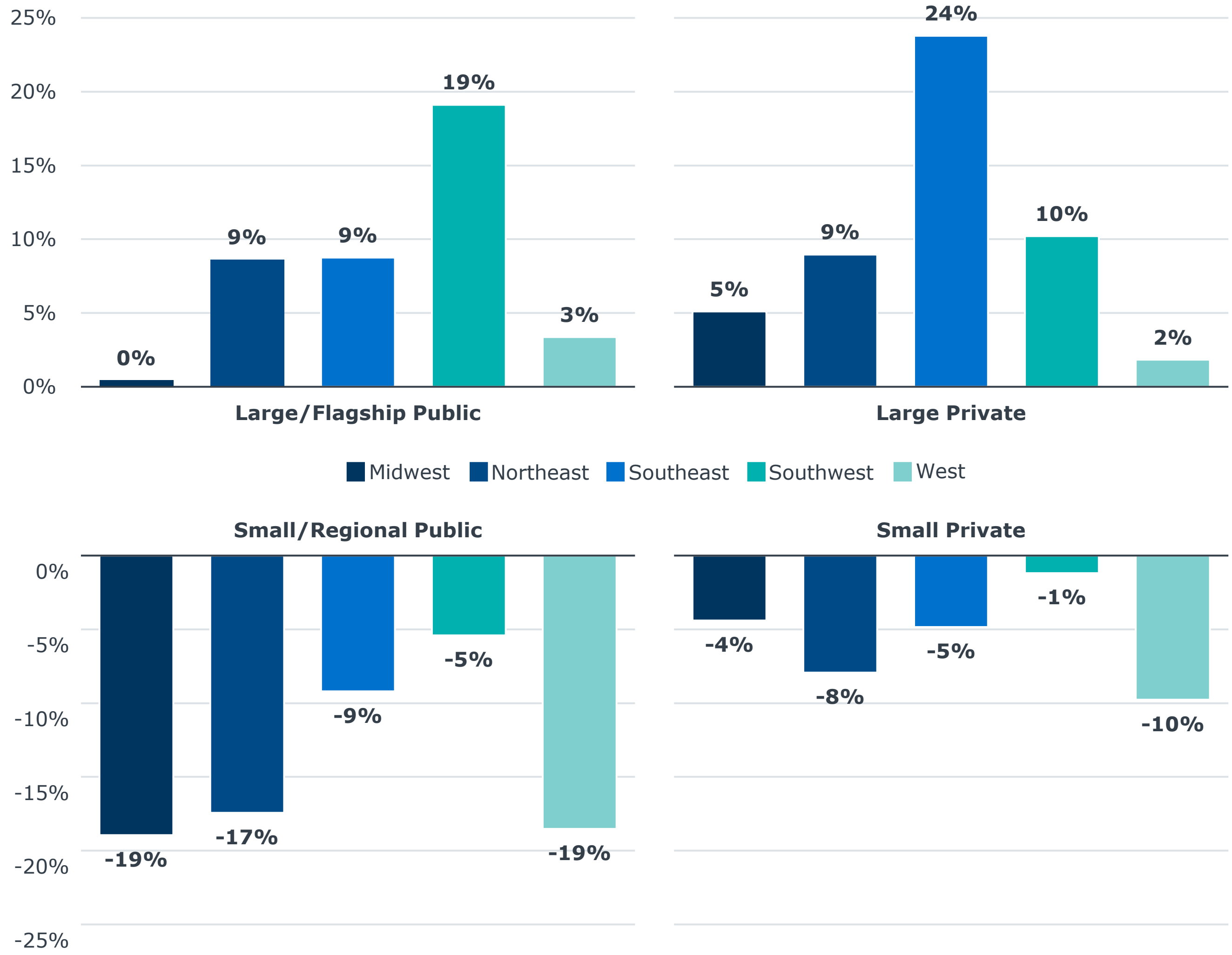
Relative Success Across Segments in the South

Large public schools in the Southwest and large private schools in the Southeast saw incredible growth over this period. Even smaller schools in the Southeast and Southwest outperformed their peers in other regions. In some cases that means that enrollment at smaller schools there simply declined less sharply, but all of this points toward a combination of stronger local markets along with a stronger attraction for prospective students across the country. This contrasts sharply with schools in the Midwest, where enrollment grew only at large private schools—and only modestly.

The next section will provide insight into how migration figures into these market differences.

The Enrollment Trajectories of Large and Small Schools Is Hugely Divergent

Percentage Change in Enrollment for 4-Year Institutions by Segment[1] and Region from 2017 to 2022



1) School size is determined by whether it enrolled more or fewer than 800 first-time full-time students in 2022.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

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Migration Trends from Fall 2017 to 2022

Migration Data for First-Time Undergraduates at 4-Year Institutions
by State, Region, and Institutional Segment

SECTION

4

Decreasing Shares of In-State Enrollment, Especially After the Pandemic

How far are students traveling?

One of the main factors driving students' choices in the college-search process is an institution's proximity to the student's home. That distance has increased significantly since the 1970s, albeit from a very low baseline with most students staying close to home.

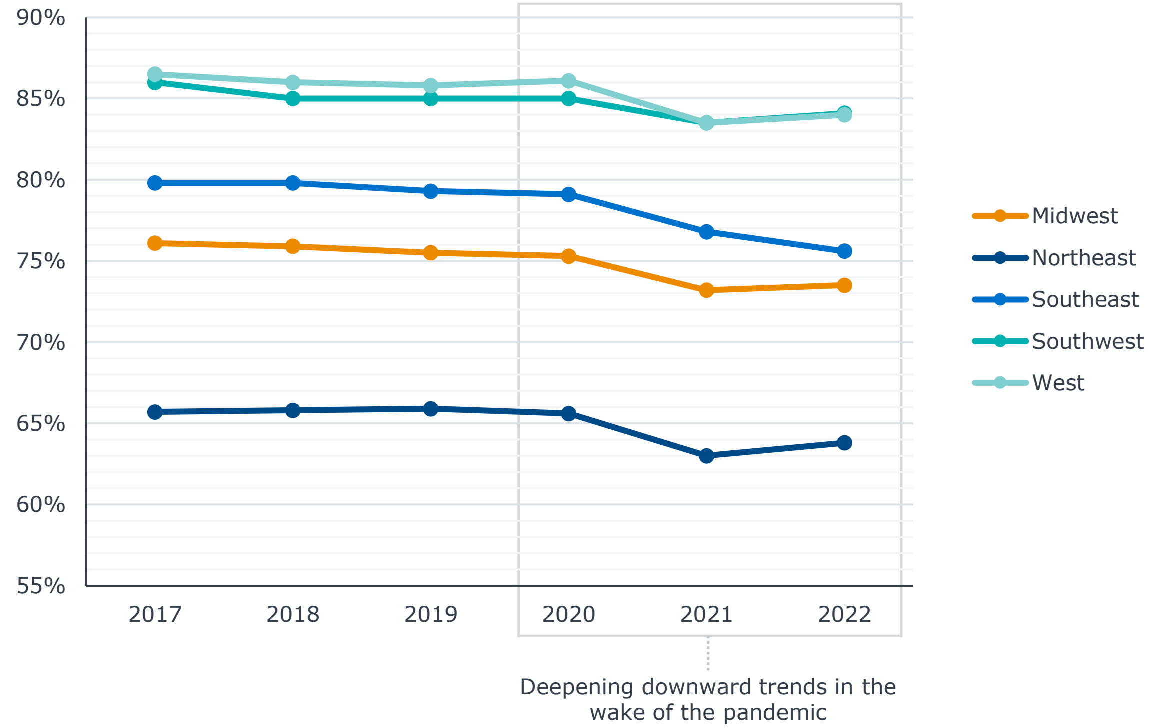
Accelerating Declines in the Share of In-State Students

Examining in-state enrollment provides a simple starting point for understanding recent migration trends. Looking back five years shows that these in-state rates have been slowly trending downward in most regions since at least 2017. This trend accelerated at the outset of the pandemic in 2020, which suggests that there was some effect in the early stages that drove more students to travel out of their home state to attend college (e.g., in response to extensive lockdowns). Slight upticks from 2021 to 2022 in three regions might indicate a reversion to the mean, but the in-state enrollment rates remain much lower than the pre-pandemic norm.

This section will explore these student mobility patterns further, including net migration and average distance traveled.

Regional Variation in In-State Enrollment Over Time

In-State Enrollment for 4-Year Institutions by Region from 2017 to 2022[1]



Change in In-State Enrollment for 4-Year Institutions by Region from 2017 to 2022

Region	*2017 to 2022*
Midwest	**-2.6%**
Northeast	-1.9%
Southeast	**-4.2%**
Southwest	-1.9%
West	**-2.5%**

1) Note that IPEDS only requires schools to report in-state enrollment in even-numbered years. This chart is therefore based on a subset of schools that report every year, which might understate the changes from year to year. However, all future charts in this section use the full population of schools in even-numbered years.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2017-2022.

Most Students Still Enroll in Schools in Their Home State

This snapshot of in-state enrollment from fall of 2022 situates us in the most recent rates for each state. It's clear that the share of students who enrolled in a school in their home state varies widely. That said, it's no surprise that a majority of states have a high baseline with 60–80% in-state enrollment.

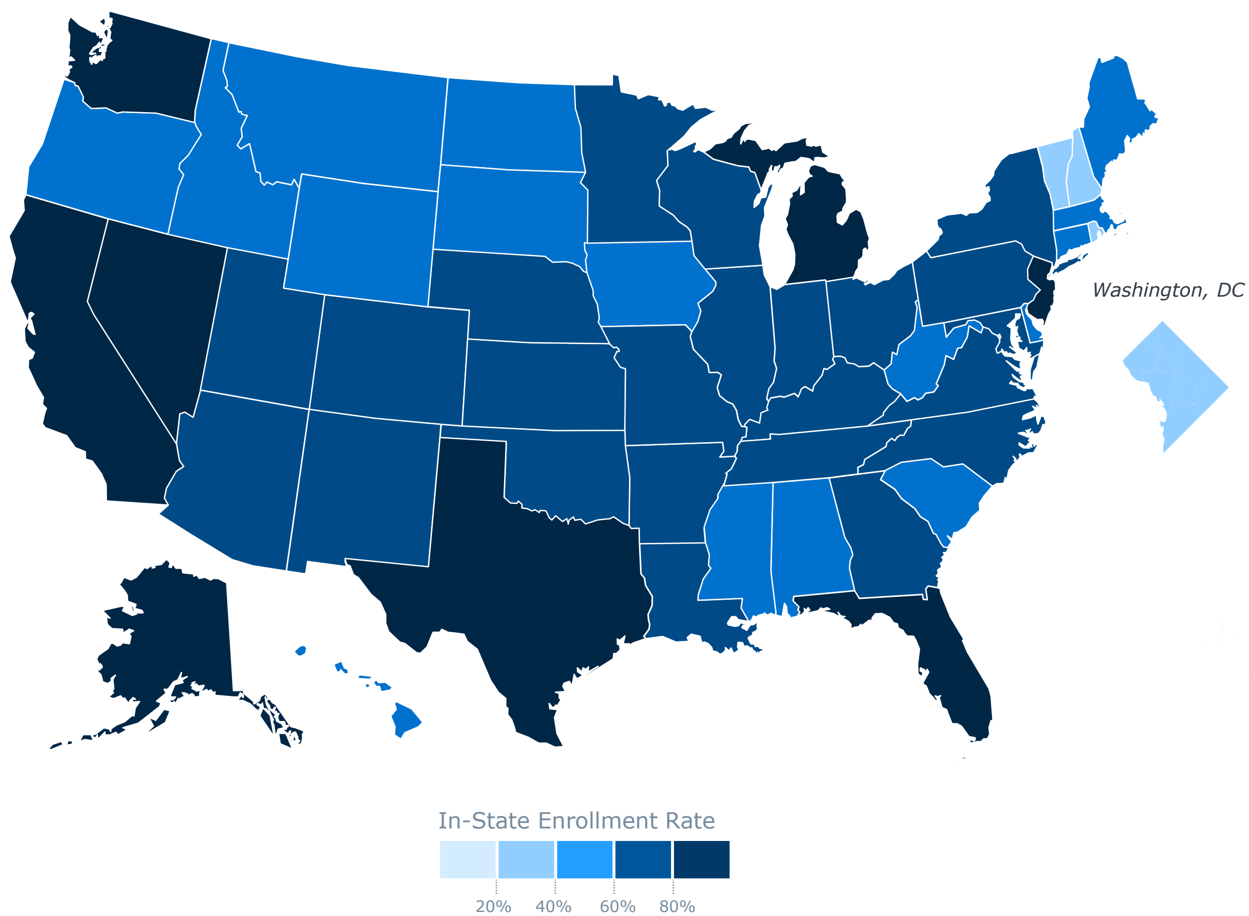
Certain Populous States Attract More Homegrown Prospects

There's a clear pattern, though, where one or more of the most populous states in each region (e.g., CA, TX, FL, NJ, WA, MI) have higher rates of in-state enrollment. This suggests that schools in this state are making powerful cases to their homegrown populations, such as through strong in-state education systems (e.g., the UC and UT systems).

This isn't the case with other populous states in the most demographically challenged regions (e.g., NY, IL). Schools there may need to deepen their local appeal, such as with New York's designation of a flagship school in their system with Stony Brook University. Otherwise, as we saw on the previous page and will see in future ones, more and more students in these states and regions are traveling out of state.

A Snapshot of In-State Enrollment Across the Country in 2022

Percentage of Students Enrolled in Their Home State in 2022



Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2022.

But In-State Enrollment Is Trending Downward in Nearly Every State

More Students Are Traveling Out of State for College

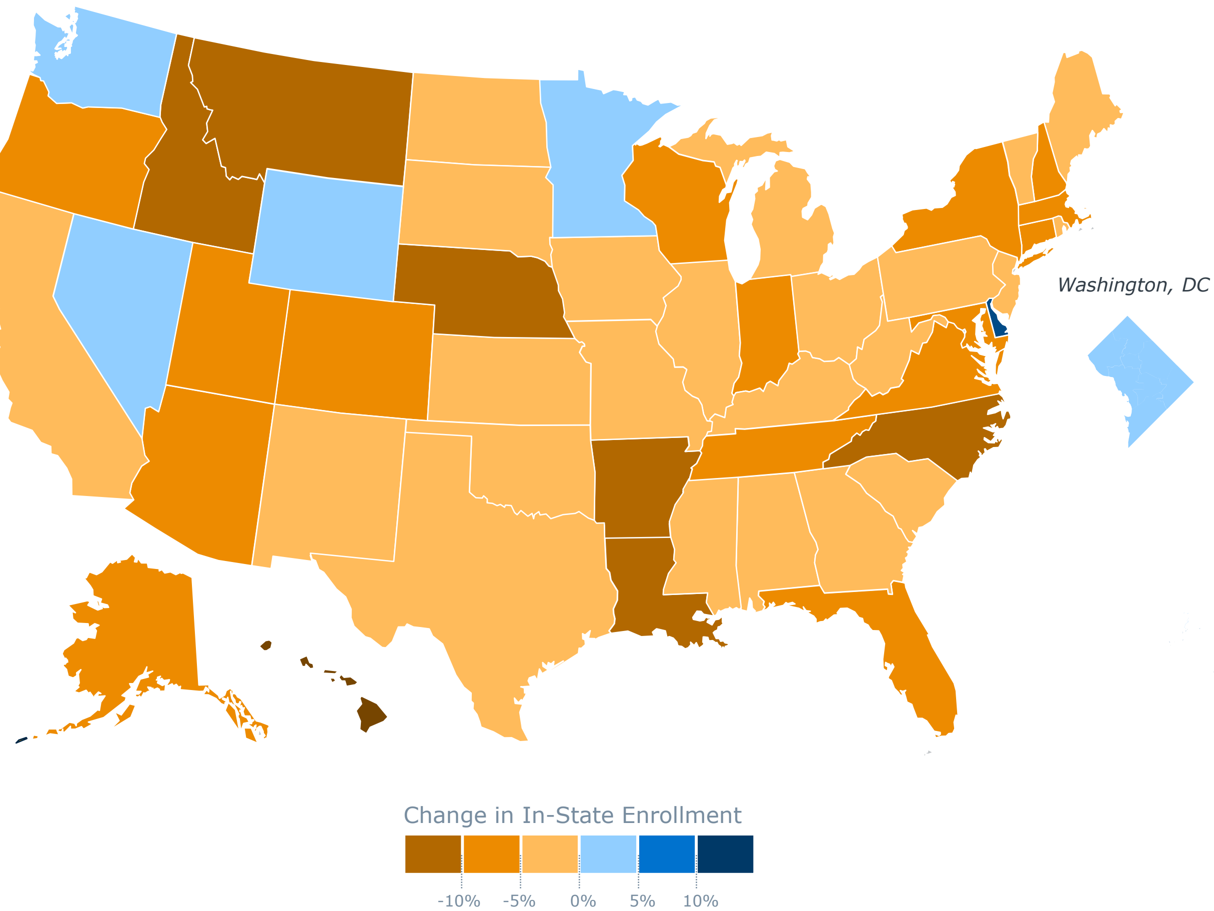
In isolation, the previous page might convey a sense that most states attract and retain most students in their primary markets. However, it becomes clear how much student preferences are changing when we examine the state-by-state changes in student enrollment since 2017. The downward trajectory of in-state enrollment has taken hold in all but a small handful of western states. This has different potential causes, such as more students in that state opting out of college, an influx from out of state, or more students are traveling to other states. Follow-up analyses that will be presented later in this section, such as the average distance traveled and net migration, suggest that more and more students are indeed traveling out of state to attend college.

Winners and Losers

We'll explore this situation in more detail by examining the overlap between changes in net migration and demographics, but the implications for this increased willingness to travel results in wins for the schools in states that are attracting them (e.g., FL) and loses for those that are losing them (e.g., NY).

Varying Degrees of Declining In-State Enrollment Across the Country

Change in the Percentage of Students Enrolled in Their Home State from 2018 to 2022



Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2018-2022.

The Share of In-State Students Is Trending Downward in All Segments

Rising Out-of-State Shares at Large/Flagship Public Schools

As you can see, every segment is trending this way, albeit to varying degrees in different regions. Remarkably, large or flagship public schools in every region have seen downward shifts in their share of in-state students. In addition to that, large schools in the Southeast have shifted the most, further suggesting that schools there are attracting more out-of-state students.

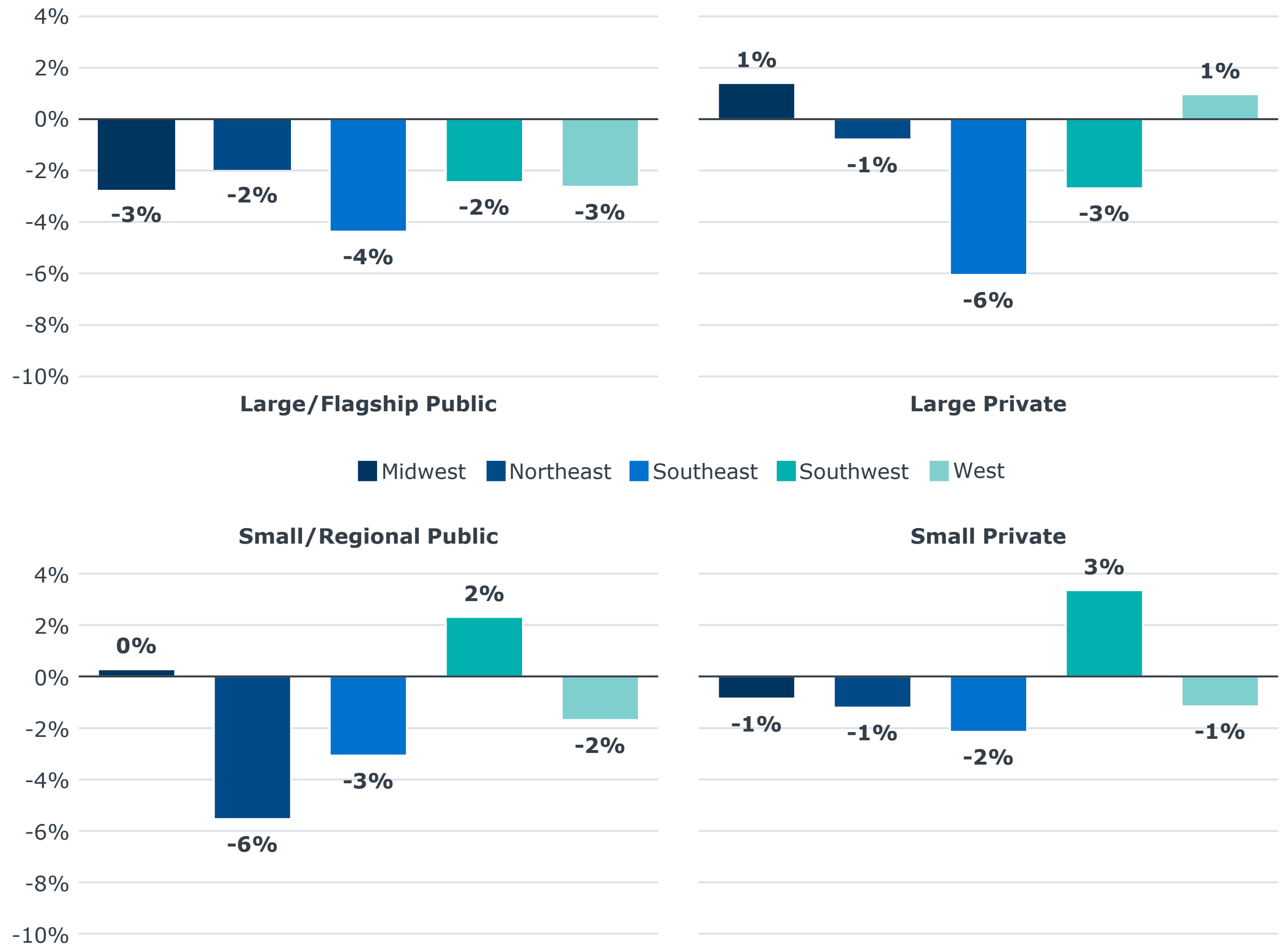
Small but Significant Changes

While these changes can appear small (e.g., 2%), they represent significant shifts in market share that can offset or exacerbate changes in the underlying population and college-going dynamics.

Given the application and enrollment numbers we've seen up to this point, this likely points less to schools in these segments and regions enrolling fewer in-state students, which would result in a lower rate of in-state enrollment, and points more to attracting more out-of-state enrollment. To validate this further, let's turn to the average distance students traveled to attend schools in each state and how that has changed over time.

A Broad-Based Decline in In-State Enrollment Across School Segments and Regions

Percentage Change in In-State Enrollment for 4-Year Institutions by Segment[1] and Region from 2018 to 2022



1) School size is determined by whether it enrolled more or fewer than 800 first-time full-time students in 2022.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2018-2022.

Students Traveling Out of State Are Usually Going Several States Away

The Average Student Is Traveling Farther for School

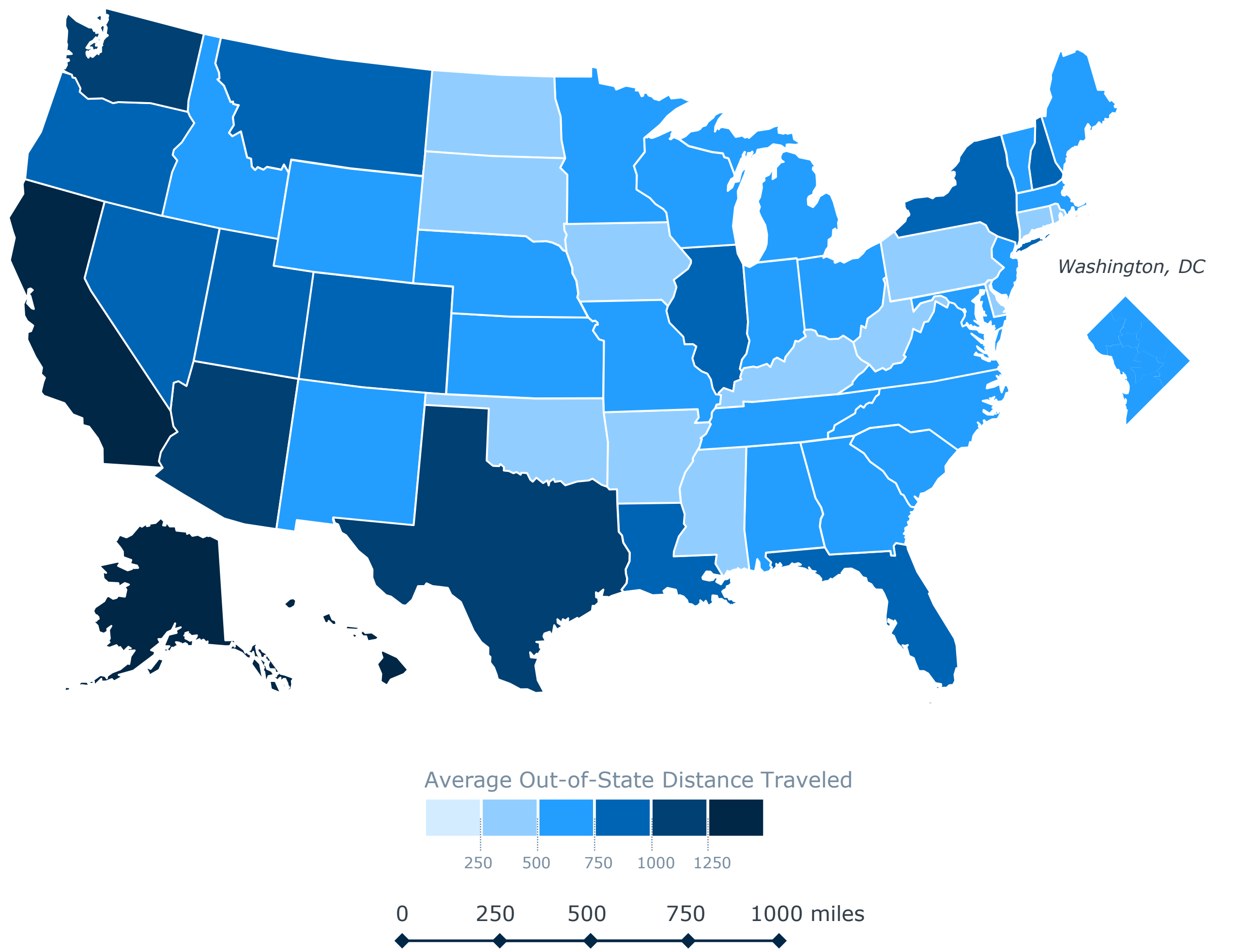
To quickly set the stage, median distance for both in-state and out-of-state students in 2018 was 151 miles, which is in line with the historical average of 150 miles. However, the median distance shifted quite significantly by 2022 to a median of 191 miles. That's a big shift after decades of slow expansion. The previous pages showed that students are also increasingly traveling out of state, so how far are they traveling?

Most States Attracted Students from Fairly Far Away

The map shows that the average out-of-state student is now willing to travel moderately far to attend school in many states, with a plurality of states enrolling these students from an average of 500–750 miles away (in lighter blues). This is not an insignificant distance, reaching across numerous states and even regions in most cases. It's clear there are some areas of greater attraction, though, including many states that also enroll a lot of their homegrown population (e.g., WA, CA, TX, FL). This shows just how strongly schools in such areas are competing on a national scale.

Schools in a Plurality of States Are Attracting Students from at Least 500 Miles Away

Median Distance Traveled[1] to a State by Out-of-State Students in 2022



1) Distance is measured between the geographic centroids of each state.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2022.

The Average Student Traveled Far to Attend Schools in Every Segment

Private Schools Attract the Most Distant Students, but Some Publics Are Close Behind

As you would expect, the average distances students travel to attend a school differ according to that school's segment and region. Across regions, the rank-order is not surprising: (1) large private schools, (2) small private ones, (3) large or flagship public schools, and (4) small or regional ones.

What is surprising, however, is just how far many out-of-state students are traveling to attend public schools. In fact, the increase in the average distance students traveled since 2018 has included even small public schools (more on page 33).

Farther-Reaching Recruitment

Our recent research shows that schools engaging with high-intent inquiries on a platform such as Appily are particularly successful with out-of-state inquirers.[3] Taken together with the fact that students are traveling farther for schools in most segments and regions, it becomes clear that a recruitment strategy with targeted and sustained outreach to more distant students can effectively extend the geographic borders of traditional markets.

Out-of-State Students Typically Traveled at Least 400 Miles to Attend a Public School

Median Distance Traveled[1] by Out-of-State Students by Segment[2] and Region in 2022

1) Distance is measured between the geographic centroids of each state, excluding Alaska and Hawaii.
2) School size is determined by whether it enrolled more or fewer than 800 first-time full-time students in 2022.
3) The hidden impact of your student recruitment and influence channels (eab.com)

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2022.

A Growing North-South Divide in Attracting Students from Far Away

Broad Growth in Students Traveling Particularly Far

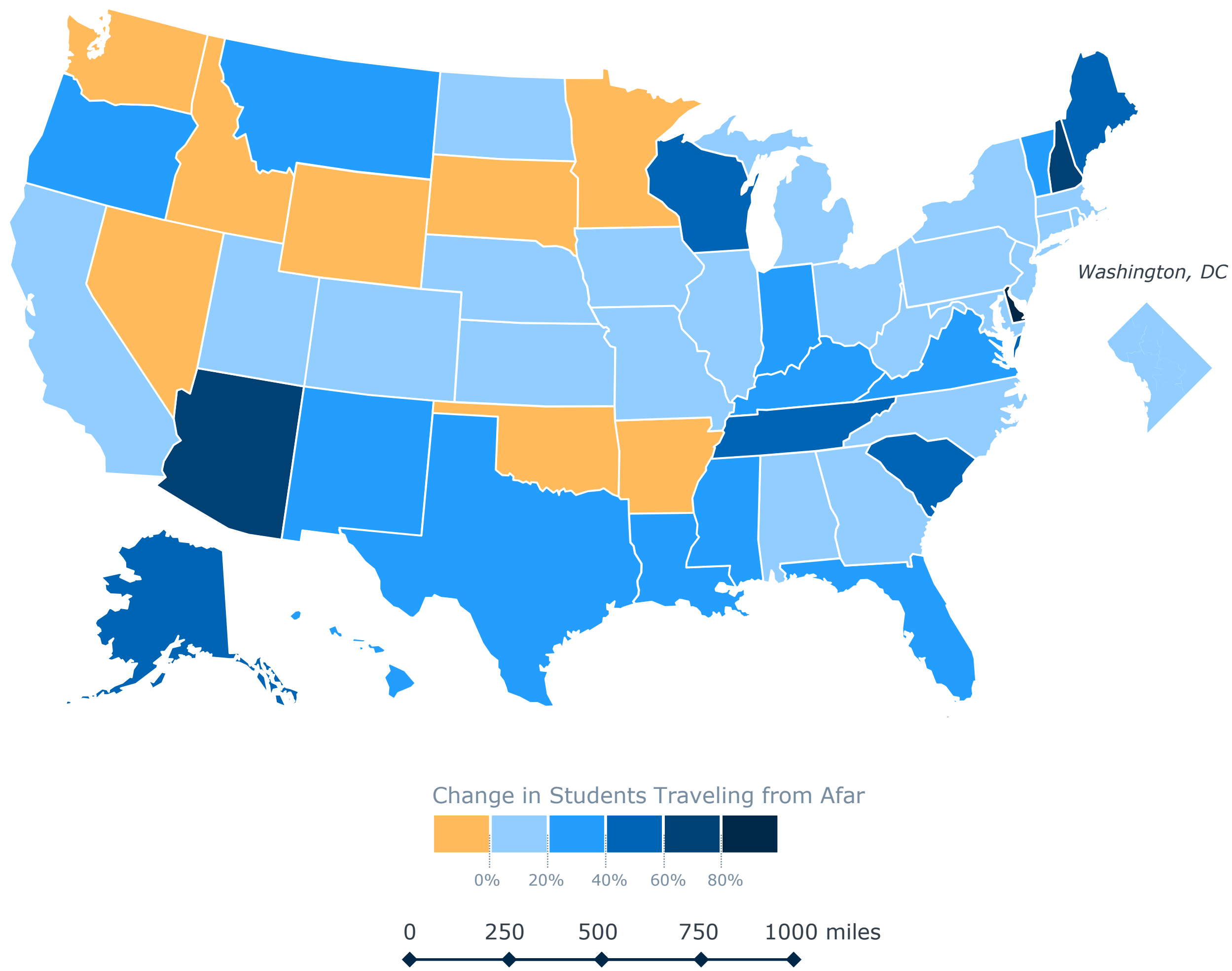
To illustrate just how much this willingness to travel has changed since 2018, let's take it a step further and zoom in on how much growth there was in students traveling a moderately large distance: 500 miles or more. As you can see on the map to the right, an overwhelming majority of states (84%) saw an increase in how many students traveled at least 500 miles to attend schools there.

Much of the Growth Is Clustered in Southern States

Outside of a cluster of growth across several states in the upper tip of the Northeast, there is somewhat of a north-south divide in the relative growth and decline in students traveling quite far to attend school. Note the string of states from Washington to Minnesota in the North that saw a decline in the number of students traveling the farthest distances to attend schools there. Meanwhile, most of the states from Arizona to Florida and up the coast to Virginia saw above-average growth in students from great distances, further indicating just how big a draw these regions have become for students far and wide.

Most States Saw at Least 20% Growth in Students Traveling 500 or More Miles

Percentage Change in the Number of Students Who Traveled[1] More than 500 Miles from 2018 to 2022



1) Distance is measured between the geographic centroids of each state.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2018-2022.

Public Schools Demonstrated a Growing Interest from Reach Markets

Large Public Schools Vastly Outpaced Other Segments

Breaking down the growth in students traveling more than 500 miles by segment and region produces remarkable results. While the average distance students travel remained higher for private schools in 2022 (see page 31), large and flagship public schools in every region showed the strongest growth in students traveling over 500 miles.

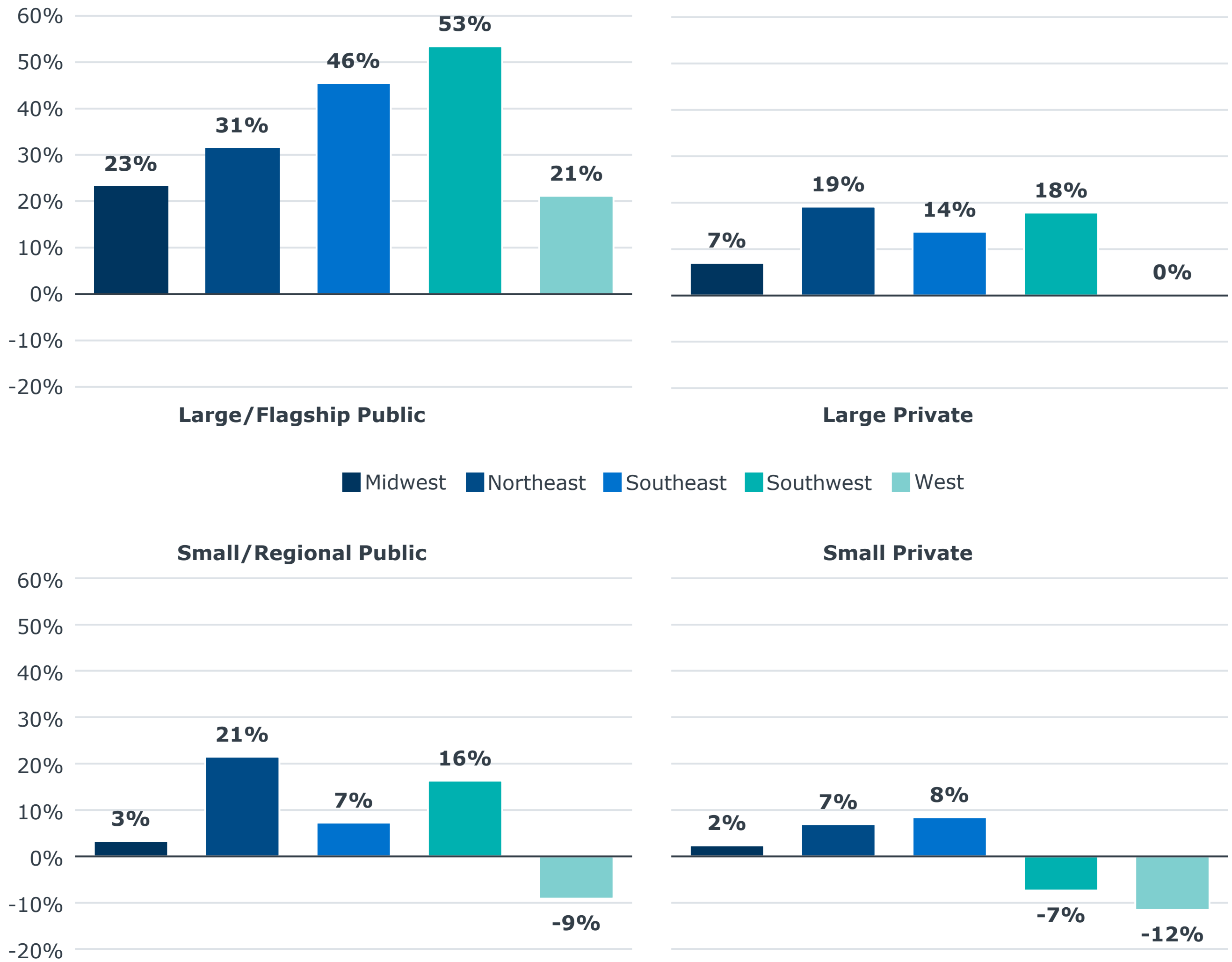
The other three segments had growth in these reach students as well, though to a lesser degree and not in all regions. This was even the case for small or regional public schools in regions hard hit by demographic change, such as in the Northeast where there was 21% growth in these reach students.

Winning Reach Students

These growth trends demonstrate that it is possible for even smaller schools in today's market to attract and enroll more students from farther away. Given the aforementioned research into how effective it can be to engage with reach prospects who inquire with you on platforms such as Apply,[3] this growth provides an opportunity for hard-hit schools to adjust their strategy accordingly.

Schools Across Most Segments and Regions Grew Their Reach Markets

Percentage Change in Students Traveling[1] over 500 Miles by Segment[2] and Region from 2018 to 2022



1) Distance is measured between the geographic centroids of each state.
2) School size is determined by whether it enrolled more or fewer than 800 first-time full-time students in 2022.
3) [The hidden impact of your student recruitment and influence channels (eab.com)](#)

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2018-2022.

Increased Net Migration Offset Many Shrinking Home Markets

Having established that more students are on the move, it is important to examine which states are seeing changes in their net migration—and how those changes overlap with the demographic changes in that state. A quick look shows that these changes coincided in fewer than half of states (22).

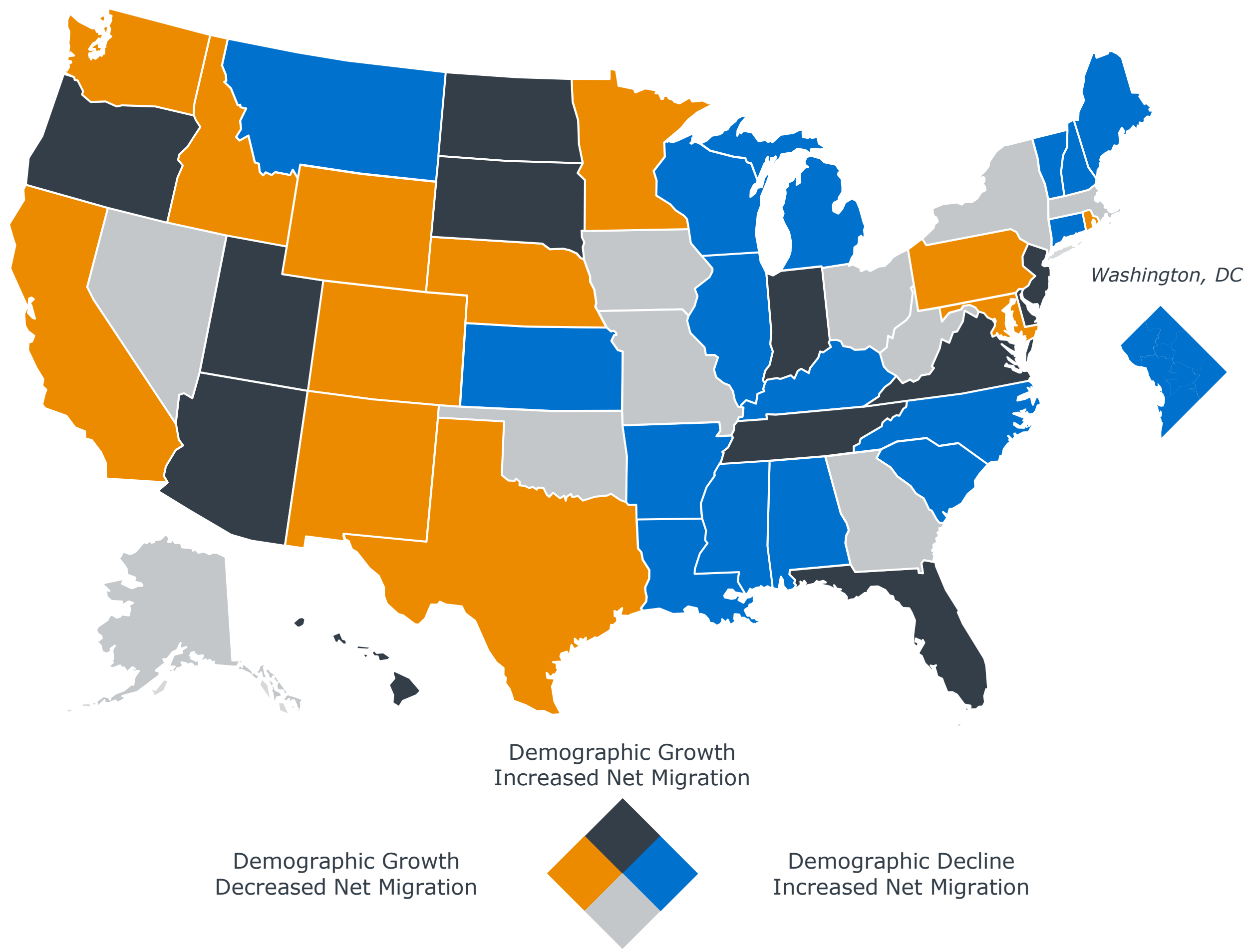
Brain Drain in the West, Success in the Southeast

Many states across the Southwest, Midwest, and West saw a decrease in their net migration alongside demographic growth (in orange). There are two possible reasons: (1) more of that growing population left, and/or (2) fewer students are coming into the state. Either poses a challenge for schools there, despite favorable underlying demographics.

In addition to states such as Florida, where both net migration and the home population grew, a cluster of states in the Southeast with increasing net migration on a backdrop of demographic decline demonstrates one reason why schools there continue to see enrollment growth. There are some similar examples in the Northeast and Midwest, which may explain why enrollment hasn't completely collapsed in line with the demographics in those regions.

The Population Dynamics in Each State Largely Track with Highly Regional Trends

The Overlap Between Changes in Net Migration[1] and Demographics[2] from 2018 to 2022



1) Net migration refers to the difference between (a) the number of students enrolling in colleges within a state from other states and (b) the number leaving that state to enroll in colleges elsewhere.
2) The combined change in the population of U.S. high school graduates and the college-going rate.

Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Data Sets, 2018-2022; 10th Edition WICHE Knocking at the College Door K12 Data; Grawe, Nathan, *The Agile College* (HEDI data file).

Inquiry Trends for the Classes of 2022 to 2024

Inquiry Data for Prospective First-Time Undergraduates at 4-Year Institutions by State, Region, and Institutional Segment

SECTION 5

Using Student Inquiries to Track the Most Recent Trends

A Representative Source of More Up-to-Date Student Trends

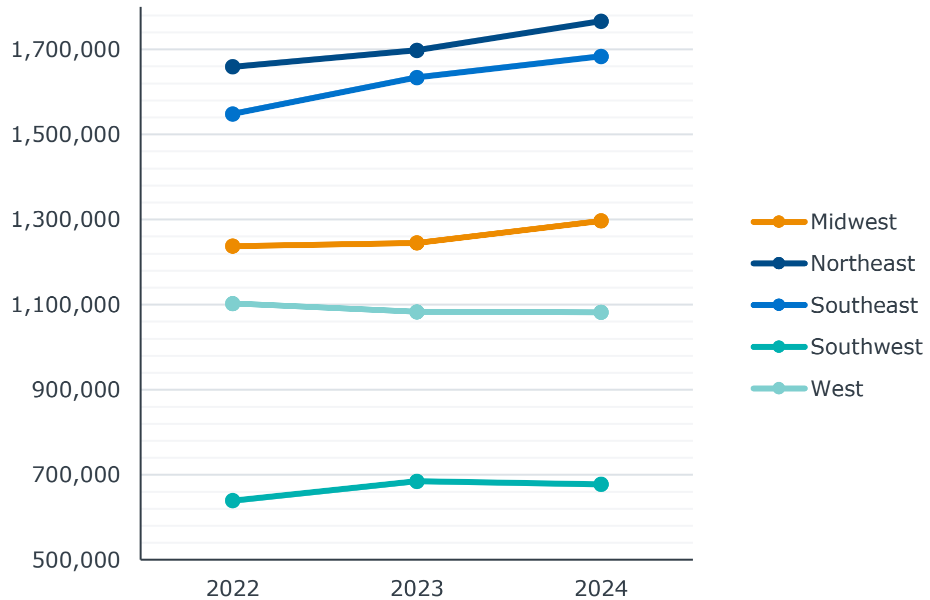
While the previous sections focused on recent trends using the complete population of students applying and enrolling at four-year institutions from 2017 to 2022, the underlying data (IPEDS) are published with a significant lag time. To provide a more current perspective, this final section uses EAB's up-to-date and representative set of student inquiry data. The population behind the inquiry trends presented throughout this section comes from the Appily platform, a part of Enroll360 Audiences with an extensive and stable share of the college-going population.

Aggregate Inquiry Trends

Charting these inquiries in aggregate offers a glimpse into the more recent landscape of student trends in the search process—trends that are correlated with enrollment outcomes.[1] At the highest level, the chart and table on the right show that the number of student inquiries has grown with each successive entering class across most regions, especially in the Southeast and Northeast. In this section, we'll examine what this has meant for schools in different states and market segments.

Regional Variation in Appily Inquiry Volume over Time

Inquiries for 4-Year Institutions by Region for the Classes of 2022, 2023, and 2024



Year-over-Year Percentage Change in Inquiries for 4-Year Institutions by Region for the Classes of 2022 to 2024

Region	*2022 to 2023*	*2023 to 2024*
Midwest	+0.6%	+4.2%
Northeast	+2.3%	+4.0%
Southeast	**+5.5%**	+3.0%
Southwest	**+7.1%**	-1.0%
West	-1.8%	-0.1%

1) Quantifying How Influence Channels Drive Enrollment | EAB

Source: EAB research and analysis.

Growing Student Interest in Schools Is Highly Focused on Southern States

Growing Interest in the South

Schools in states across the South, which we've seen have garnered much enrollment success up to now, have continued to dominate student interest. The growth in inquiries for schools in these states is both high and consistent across these two regions. The only exception is West Virginia, where we saw enrollment was already down through 2022.

Uneven Growth in the Northeast and Midwest

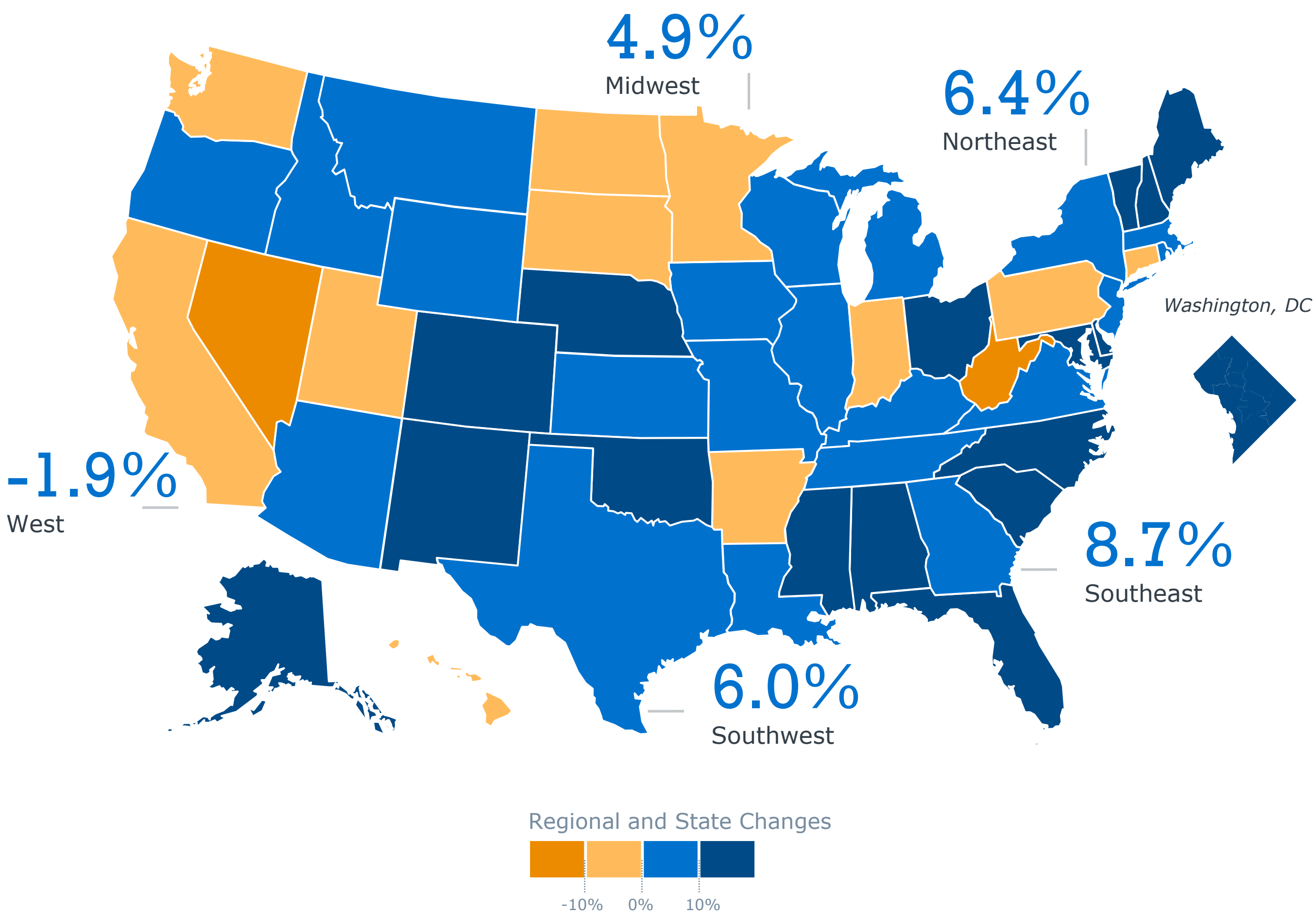
Many states in these struggling regions saw large growth in inquiries, especially in the Northeast. However, interest waned somewhat for schools in the Dakotas, Minnesota, Indiana, and Pennsylvania, which indicates a continuation of the shrinking enrollment in those states that we've seen through 2022.

Declining Interest in the West

Some states in the West saw a net increase in inquiry volume, but the overall trend suggests declining interest in a region that already saw flat enrollment through 2022. Nevada and Washington stand out, with both shrinking enrollment through 2022 and now shrinking student interest through 2024.

State-by-State and Regional Variation in Student Inquiries Received

Percentage Change in Inquiries for 4-Year Institutions from the Classes of 2022 to 2024



Source: EAB research and analysis.

Demographics Played a Larger Role in the Most Recent Market Changes

Unlike many of the changes in applications and enrollment from 2017 to 2022, there was a larger overlap between demographic changes and changes in inquiry growth (67%, in black and grey) for the last several classes, a period characterized by growth in most states and regions in the lead-up to the looming "demographic cliff."

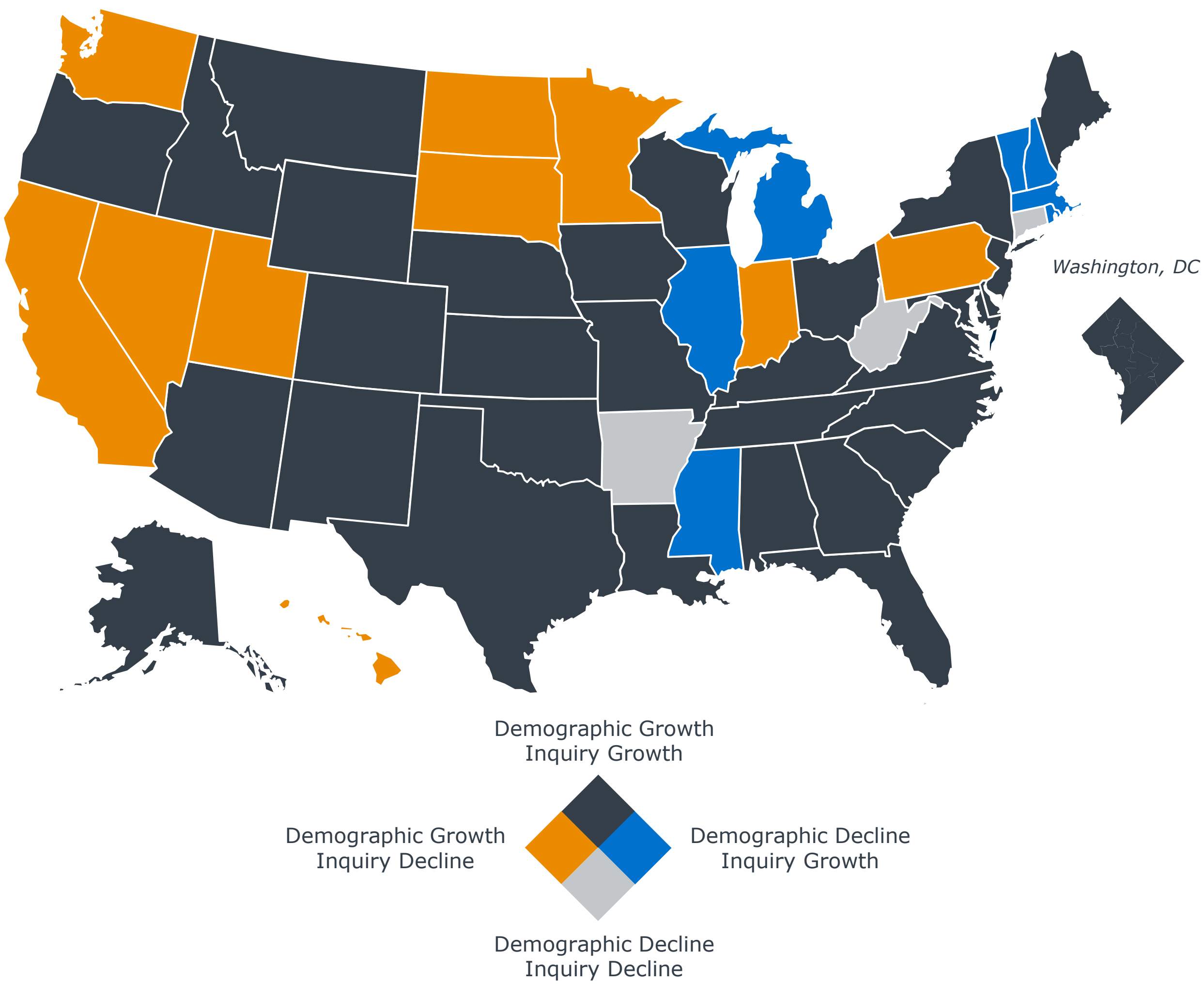
The Exceptions Are Noteworthy

Schools in the heart of New England managed to attract more interest despite shrinking primary markets, as did the large states of Michigan and Illinois in the Midwest. These demonstrate the fact that demographics aren't destiny. Many schools are already making up for demographic shortfalls with shifts in market share.[2]

That said, the other implication is that a growing primary market does not guarantee growing student interest for schools there, as was the case across many states in the Midwest and the West, in particular. These are regions face looming challenges, such as population decline in the Midwest and low college-going in the West, which suggests that many schools will need to dramatically overhaul their enrollment strategies to succeed.

Clear Regional Patterns in How Demographics Influence Student Inquiries

The Overlap Between Changes in Inquiry Volume and Demographics[1] from the Classes of 2022 to 2024



1) The combined change in the population of U.S. high school graduates and the college-going rate.
2) [How to uncover hidden threats in past enrollment trends | EAB]

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

Large Public Schools Have Steadily Attracted More Students

A couple patterns emerge as we turn to how the volume of student inquiries has changed by school segment and region.

Success for Many Public Schools

Large and flagship public schools performed well in most regions, indicating their continued strength in attracting student interest. This contrasts sharply with the other segments, which had mixed bags of large successes and modest declines in interest from students over the last several years. That said, small and regional public schools performed exceptionally well in the southern regions.

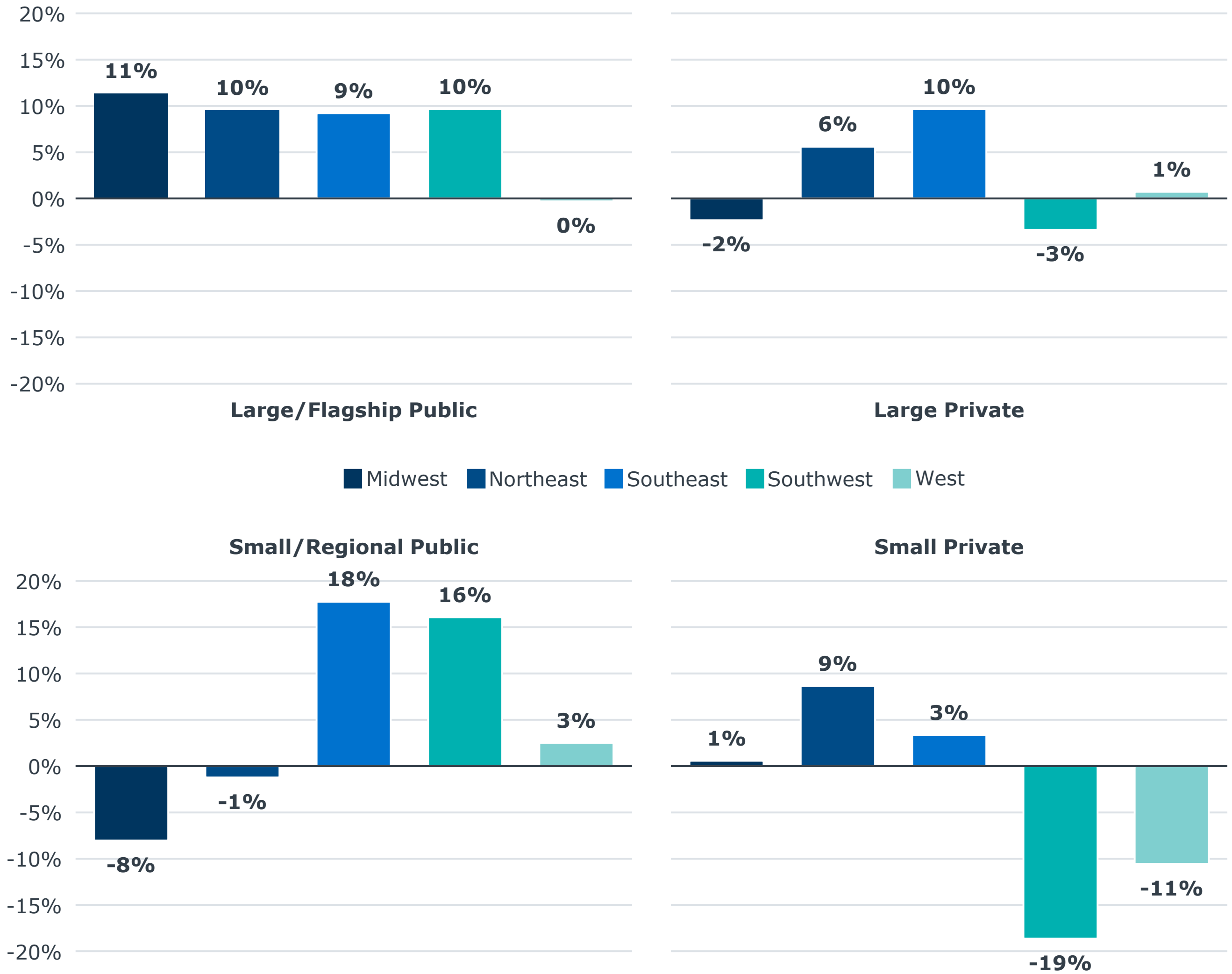
Broad Struggles in the West

The struggles already noted across western states hit all segments. There was, at best, anemic growth in inquiries found in small public schools. The largest drops occurred among small private schools in the West and Southwest.

Except for large or flagship public schools, most segments in the Midwest faced flat growth or outright decline. Contrast that with schools in the Southeast that continue to attract more student interest across all segments—especially among public schools.

Recent Shifts in Student Interest Have Differed Greatly by School Segment and Region

Percentage Change in Inquiries for 4-Year Institutions by Segment[1] and Region from the Classes of 2022 to 2024



1) School size is determined by whether it enrolled more or fewer than 800 first-time full-time students in 2022.

Source: EAB research and analysis.

Many Students Continue to Consider Traveling to Other Regions

An Increasing Travel Range

How far did students from the incoming class consider traveling? The median distance for all students[2] in the class of 2024 was 210 miles, which exceeds the 191 miles that the average student traveled in 2022. When we break this down for students in each state considering out-of-state schools, it suggests a continuation of the trend of students traveling farther.

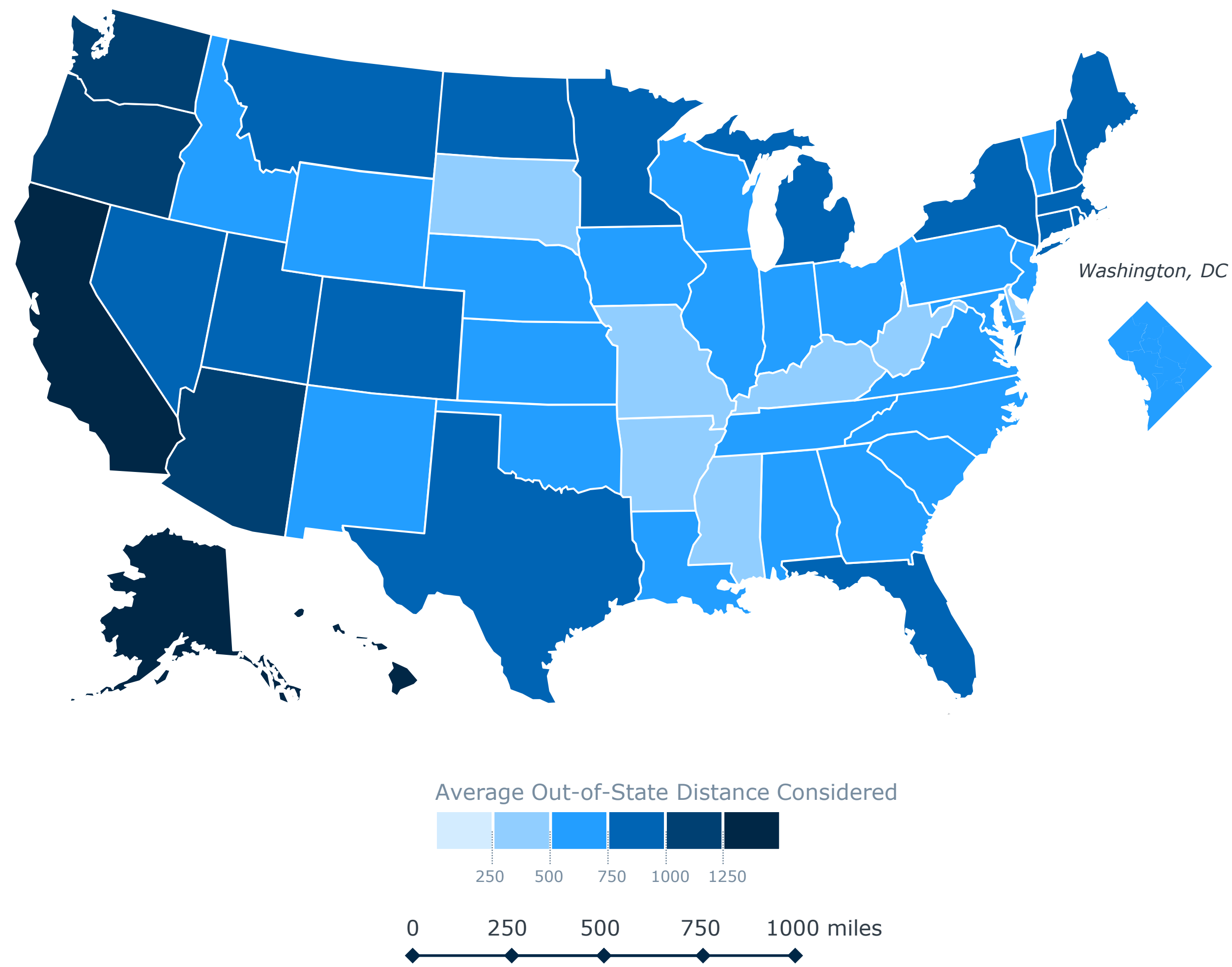
They Considered Traveling 1,000 Miles or More to Many States

In fact, the distance many students considered traveling for school ranges all the way up to 1,500 miles in many western states. Even more states saw the average out-of-state student considering schools there from as far as 1,000 miles away. This was especially the case in the Northeast and the West, as well as big destinations such Florida and Texas in the South.

Very few states had an average of less than 500 miles that students considered traveling to go there. Aside from Delaware in the Northeast, all these states were clustered in the Midwest and Southeast, which suggests that certain geographic factors may have curbed student interest from afar.

The Average Distance Students Are Considering to Travel Out of State to Attend School

Median Distance Inquired[1] to a State by Out-of-State Students from the Class of 2024



1) Distance is measured between the geographic centroids of each state.
2) Due to limited geographic data, in-state students are considered as having traveled 0 miles.

Source: EAB research and analysis.

Students Reached Much Farther from Home for Large Public Schools

Higher Distances Considered

When we examine the differences in these distances by segment and region, it's clear that students have continued to consider traveling quite far for school across many regions and segments. This suggests that the range students are willing to travel continues to increase.

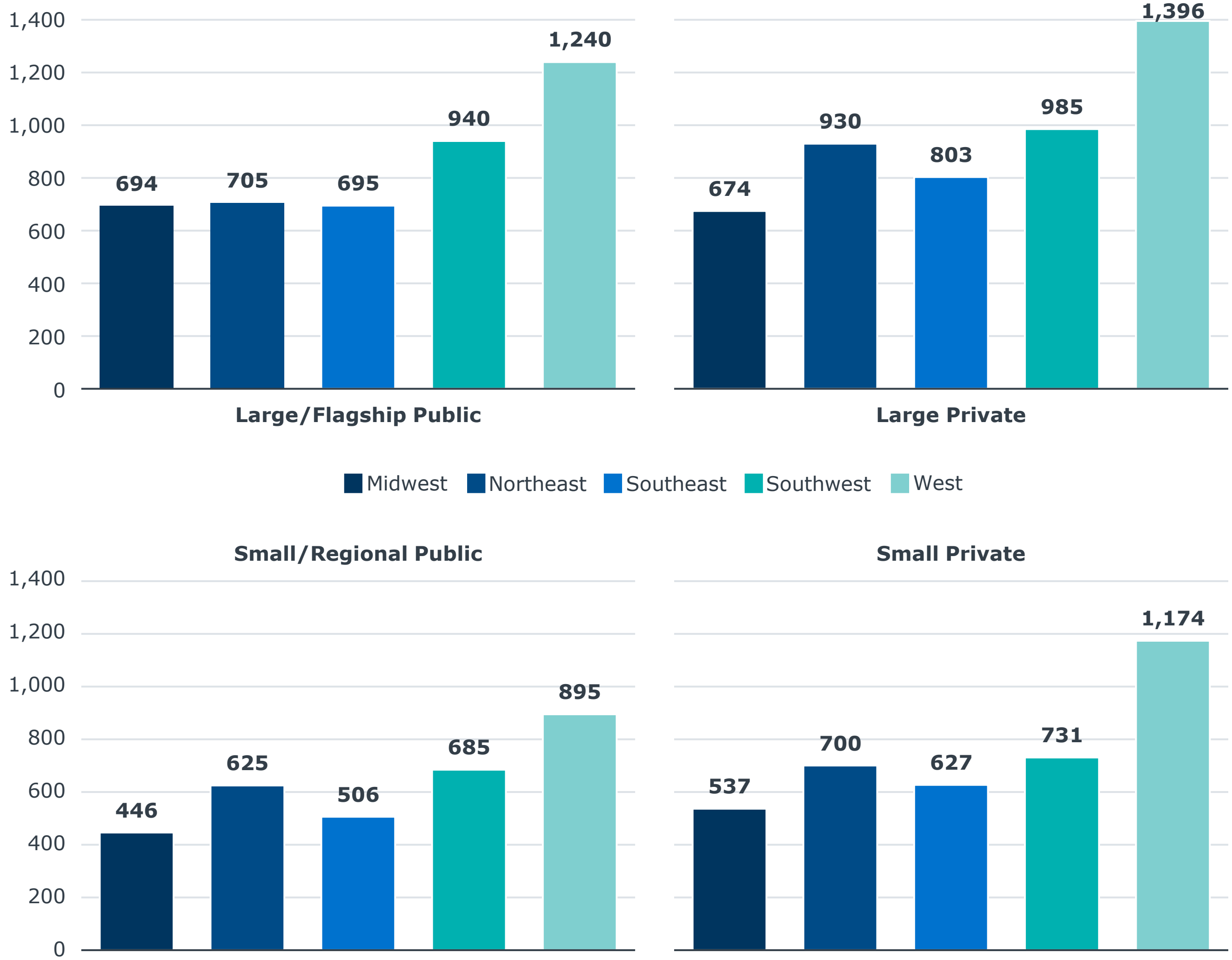
Large Publics Are Catching Up to the Appeal of Large Privates

Focusing on the differences between each segment, the most noteworthy outcome is that students from the class of 2024 considered traveling farther, on average, to attend large or flagship public schools than small private schools. This is noteworthy since, of the four segments, small private schools sat comfortably in second place within the rank-order of distances students traveled in 2022 (see page 31).

In fact, students from the class of 2024 considered going almost as far to attend large public schools as they did for large private ones, which indicates an increasing and far-reaching appeal for this segment. Even small public schools in some regions boasted quite a range, which demonstrates just how far schools—even public ones—can reach into other markets today.[3]

The Distance Students Considered Traveling Varies by School Segment and Region

Average Distance Inquired[1] by Out-of-State Students from the Class of 2024 by Segment[2] and Region



1) Distance is measured between the geographic centroids of each state, excluding Alaska and Hawaii.
2) School size is determined by whether it enrolled more or fewer than 800 first-time full-time students in 2022.
3) [The hidden impact of your student recruitment and influence channels (eab.com)]

Source: EAB research and analysis.

Inquiries Are a Purposeful Component of the College Search

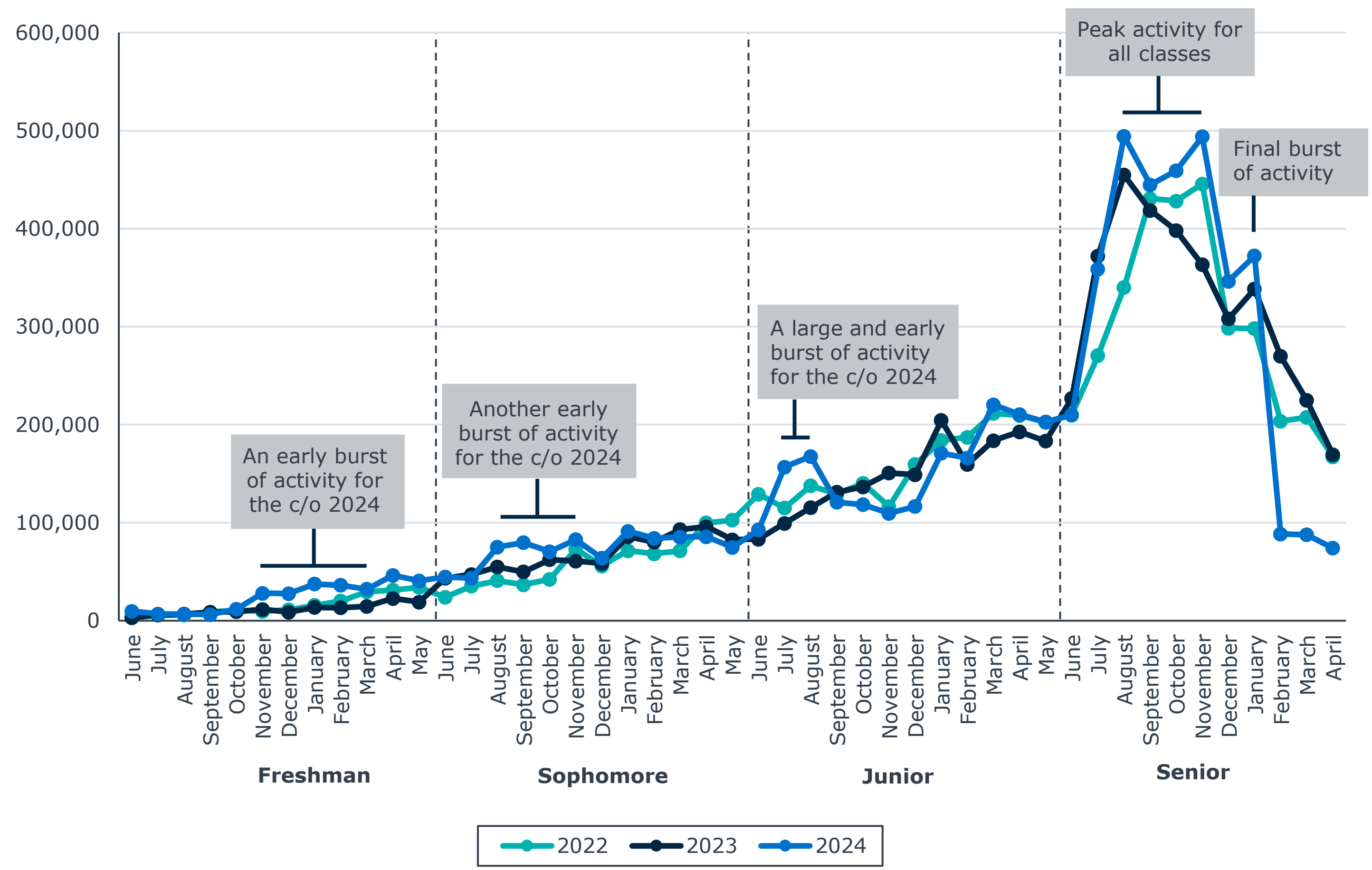
The rates at which students are inquiring and applying to schools in recent years (i.e., 5 and 10 per person on average, respectively) suggests that they are more deliberate with their inquiries than applications. The deliberate nature of this stage of the college search leads us to ask: When are students actively inquiring with schools in their college search? Understanding this timeline can help you tailor outreach efforts during crucial decision-making phases for prospects.

Earlier Bursts of Inquiry Activity from the Class of 2024

There are some general tendencies across classes, such as how the bulk of inquiry activity occurs in senior year and the last burst of activity aligns with winter break of that year. There is some variation from class to class that is notable, such as how the class of 2024 continually inquired earlier than the preceding classes, with gaps arising early in each of the first three years of high school. This class peaked higher and earlier in their senior year as well. In fact, the peak spike in inquiries moved from September (2022) back to August (2023 and 2024), which could indicate movement in overall search timing.

The Precise Timing of Inquiries Has Varied for the Last Three Incoming Classes

Volume of Inquiries over Time for the Classes of 2022, 2023, and 2024



Source: EAB research and analysis.

The Latest Class's Search Reverted to an Earlier Timeline

Inquiry Activity Happened Later in the Wake of the Pandemic

Is the timeline on which students conduct their college search shifting? This is an important question given that the data for recent years from several surveys and EAB's audience platforms showed that search timelines were, in fact, moving later and later after the outset of the pandemic.[1,2,3]

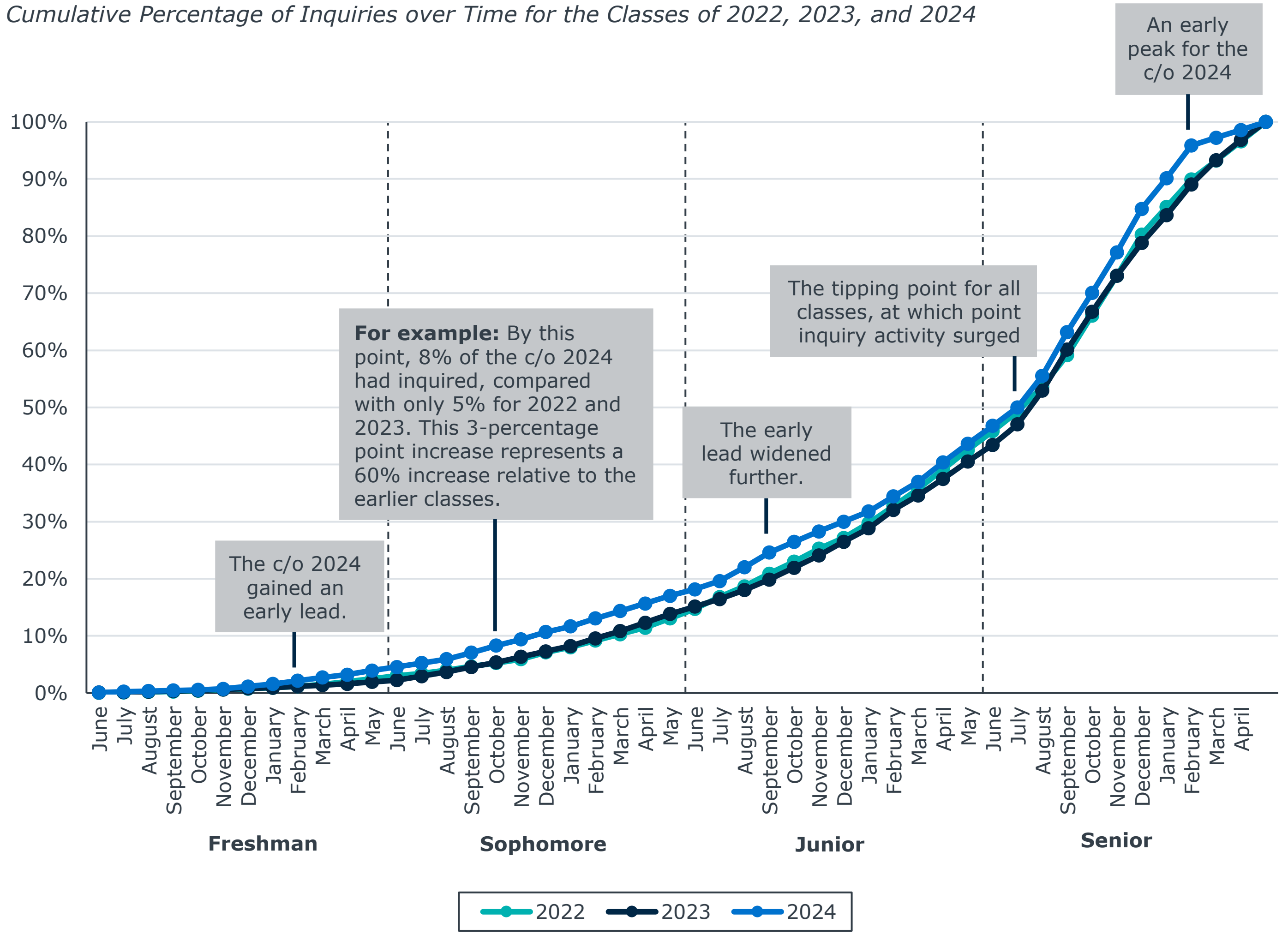
The previous chart provided some indication that a reversion of this trend may have begun, but observing the precise volume and timing of inquiries can obscure this. The cumulative inquiry activity for each class over the course of their high school career provides a clearer view into this matter.

The Start of an Earlier Search

It's clear that cumulative activity for the classes of 2022 and 2023 remained on par with one another throughout their high school careers. However, the class of 2024 gained an early and consistent lead with their own activity. Upwards of 7% of that class inquired up to four months sooner than their predecessors. This suggests a non-trivial reversal of the previous trend of increasingly later searches, which we will continue to track.

The Class of 2024 Consistently Inquired Earlier than Previous Classes

Cumulative Percentage of Inquiries over Time for the Classes of 2022, 2023, and 2024



1) EAB College Search Trends 2023.
2) EAB Communication Preferences Survey 2023.
3) IHE Student Voice Survey 2022.

Source: EAB research and analysis.

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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 to 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.

appily

Machine Learning

We leverage behavioral insights drawn from 6M+ student inquiries in Appily'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*

INTERSECT BY POWERSCHOOL

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

college greenlight

Segmented Inquiries

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

CBO Engagement

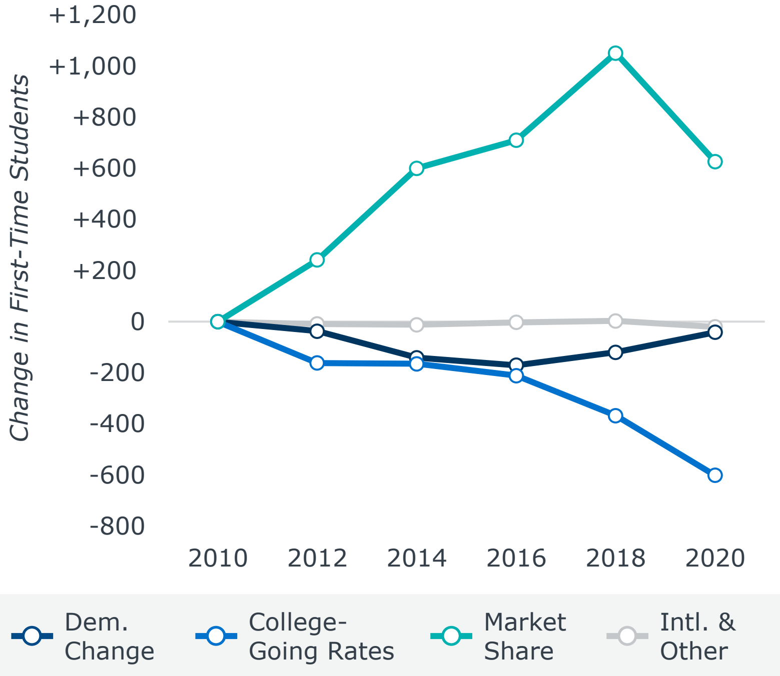
Build mutually beneficial relationships with CBO advisors via the nation's largest college access network

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 United States from 2010 to 2035. The example below reveals the cumulative impact of factors such as 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, thus 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.

Cumulative Change, by Enrollment Force

EAB University



Cumulative Impact of Each Force from 2010 to 2020

Demographic Change
-41 Students

College-Going Rate
-601 Students

Market Share Change
+627 Students

International & Unknown Origin
-20 Students

Overall Enrollment Change
-36 Students
-1% change from 2010 levels

EAB RESEARCH
Strategic Advisory Services

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.

Student Residence + Migration in Virginia

73.7k
Total first-time enrollment at institutions located in Virginia

77%
In-state residents attending Virginia institutions

16,997 out-of-state students attending Virginia colleges

+3,020
Net Migration

13,977 Virginia residents attending college out of state

110 In-State Colleges + Universities

Institution Type	4-YR	2-YR	Total
Public	17	24	41
Private, NFP	39	1	40
Private, For Profit	16	13	29
Total	**72**	**38**	**110**

Insights: Fall 2016 to Fall 2020

-7%
Total first-time enrollment in VA

-6%
In-state residents attending VA institutions

-10%
Out-of-state students attending VA institutions

1.Digest of Education Statistics, 2021 Table 309.10, Fall 2020.
2.*The Chronicle of Higher Education*, Almanac 2022.
3.NCES Enrollment of first-time undergraduates by residence, Fall 2020.

Source: EAB Demographic Analytics State Profiles.

Reach and Engage Today's Students with Enroll360

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.

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.

Transfer

Facilitate the transfer process and boost enrollment through best-in-class technology and marketing.

Powered by the Leading Student-Facing Platforms

appily

NAVIANCE BY POWERSCHOOL

To speak with an expert about your marketing and enrollment strategy, email <u>eabenrollmentcomm@eab.com</u>. Learn more at **eab.com/Enroll360**.

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**.