



# The 360 Report

**SPECIAL EDITION**

## Audience Strategy Implications of Connections and PSAT Changes

*January 22, 2024*

Webinar will begin promptly at 2:31 EST

# Meet Today's Presenters



**Michael Koppenheffer**

*Vice President, Enroll360  
Marketing and Analytics*

[mkoppenheffe@eab.com](mailto:mkoppenheffe@eab.com)



**Brandy Palmer**

*Senior Director, Demographic  
Analytics, Enroll360*

[bpalmer@eab.com](mailto:bpalmer@eab.com)

## Connect with EAB

---



@EAB



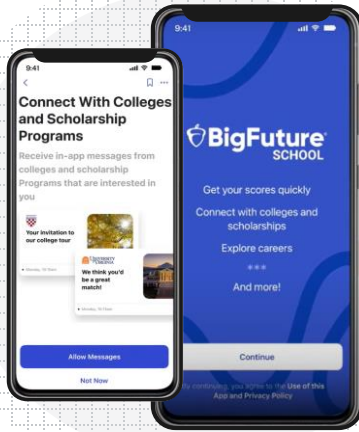
@EAB



@eab\_

# The Debut of 'College Board Connections'

## A New Channel with Implications for Search Availability



New app-based platform from College Board



An expansion of your existing student communications



EAB supporting Connections as channel within Cultivate



Launched in November, with more releases coming this spring

## Today's Agenda

# The 360 Report

**SPECIAL EDITION**

**PSAT Update** | Contextualizing volume volatility

**Connections Update** | Reporting on early results

**What's Next** | Takeaways for the upcoming cycle



# PSAT Update

Contextualizing Volume Volatility



# Multiple Ways Students Get to “Student Search”



## Student Groups Available in College Board Student Search Service

### Assessment-Based

PSAT

*Largest percent of students test during fall of 10<sup>th</sup> grade*

SAT

*Largest percent of students test during spring of 11<sup>th</sup> grade*

AP

*Largest percent of students test during spring of 10<sup>th</sup> and 11<sup>th</sup> grade*

### Other

Non-Assessment

- Big Future
- Khan Academy
- College list
- College Board account creation
- Email/SMS/Social Media
- Referral marketing



## Initial Outlook after Connections Announcement

### Marketplace



#### Heavy Rain, Thunderstorms

Instant fear and worst-case scenarios. No students will be available.

### EAB



#### Mostly Cloudy, Partly Sunny

Understanding the makeup of College Board Search and using historical data.

# How Did December College Board Turn Out?



8

## Outlook after PSAT Data Feed and Analysis

### Marketplace



### Unknown Conditions

Confusion or silence. Since  
Connections going live  
there has been little.

### EAB



### Mostly Cloudy, Partly Sunny

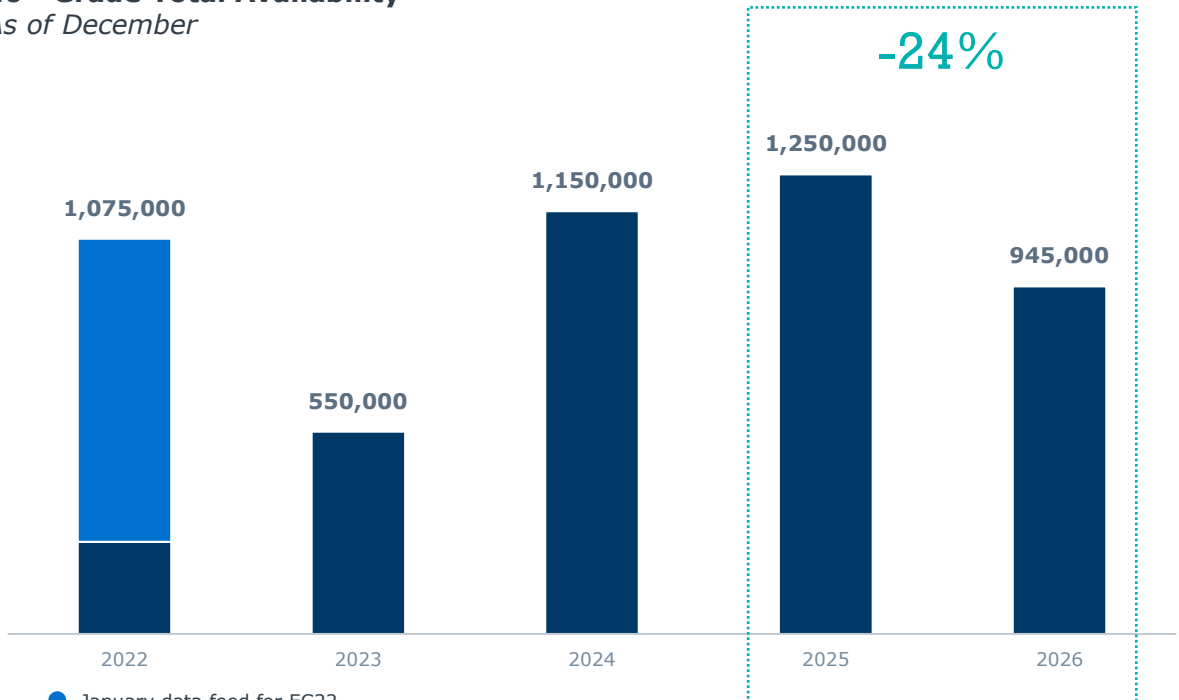
Large availability of  
students still exist. Search  
is still evolving.



# Decline in 10<sup>th</sup> Grade Availability, as Expected



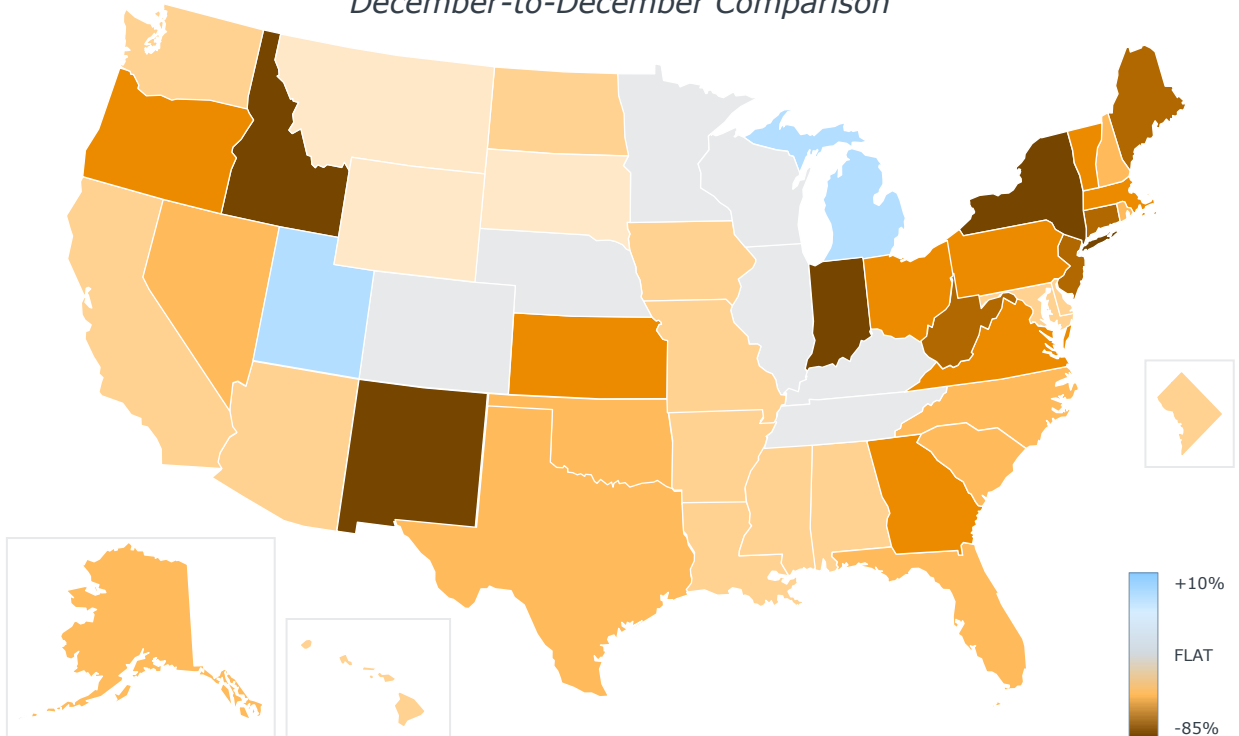
## 10<sup>th</sup> Grade Total Availability *As of December*



# Most States Seeing Sophomore Drops



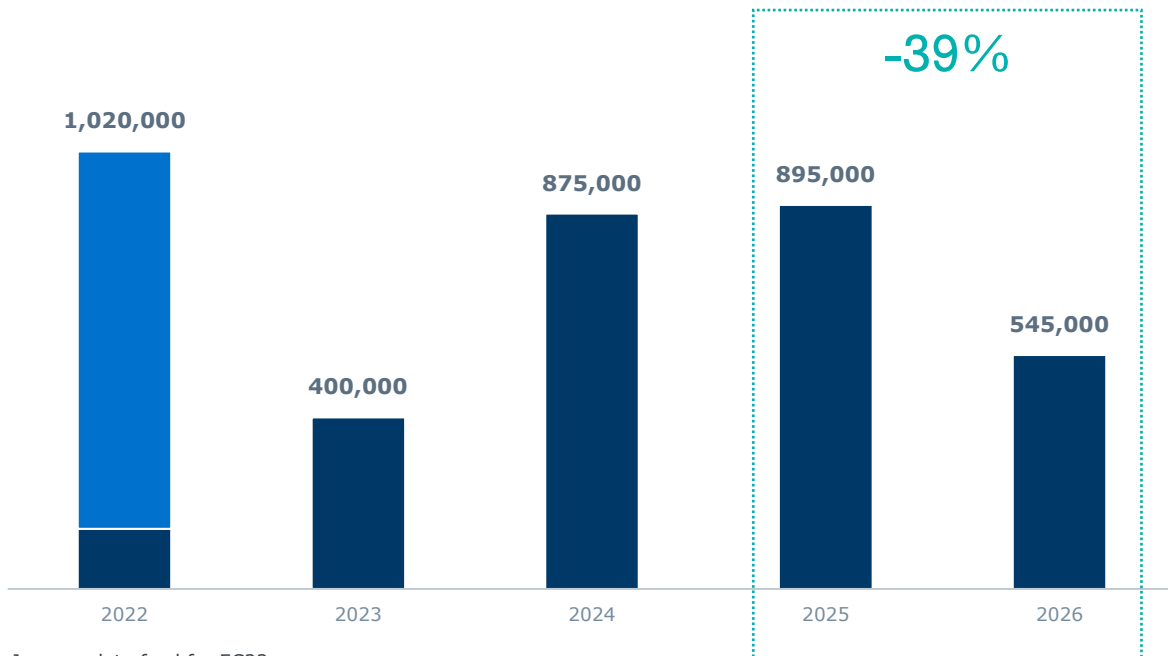
**Total Availability, EC26 vs. EC25**  
*December-to-December Comparison*



# PSAT Driving 10<sup>th</sup> Grade Availability Dip



## 10<sup>th</sup> Grade PSAT Availability *As of December, Domestic Only*



● January data feed for EC22



## December Total Availability Overview

### 11<sup>th</sup> Grade (EC25)

- Availability is **FLAT**: 1.8M last year vs. 1.7M+ this year
- 12 states saw an increase: AR, DC, GA, IL, KY, LA, NM, NV, RI, UT, WI, WV
- College Board impact states with >15% decrease: ME, NY, PA, VT
- NY saw a decrease of 25%

### 10<sup>th</sup> Grade (EC26)

- Availability is **DOWN 24%**: 1.2M last year vs. 945K this year
- 5 states saw an increase: CO, MI, TN, UT, WI
- Largest % decrease: CT, ID, MA, ME, NM, OH, PA, WV
- Largest # decrease: CA, FL, TX
- Overall, most negatively impacted: GA, IN, NJ, NY

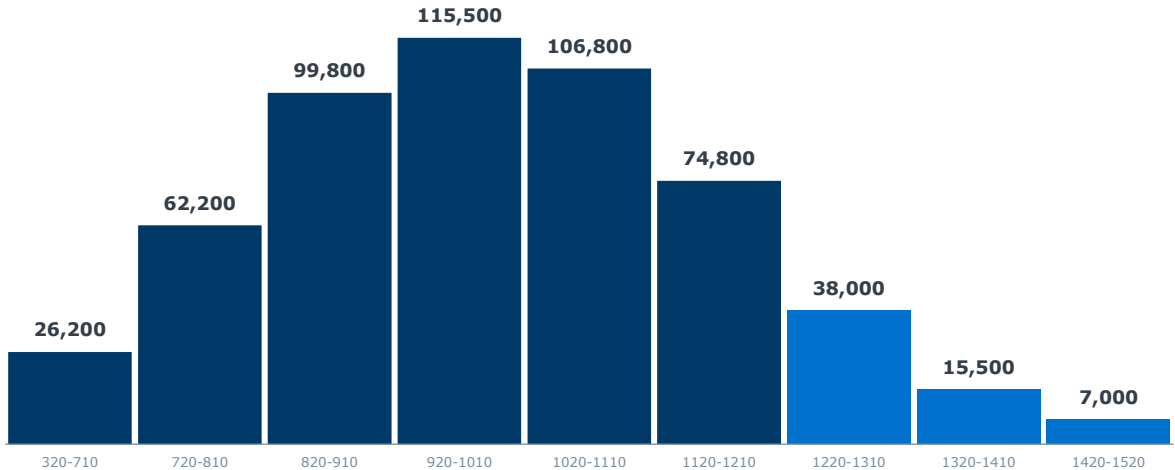
# Only So Many High-Scoring PSAT Testers



## 10<sup>th</sup> Grade PSAT Score Distribution by Range

*December 2023 Analysis of Available PSAT Testers*

320-910	920-1210	1220-1520
35%	54%	11%



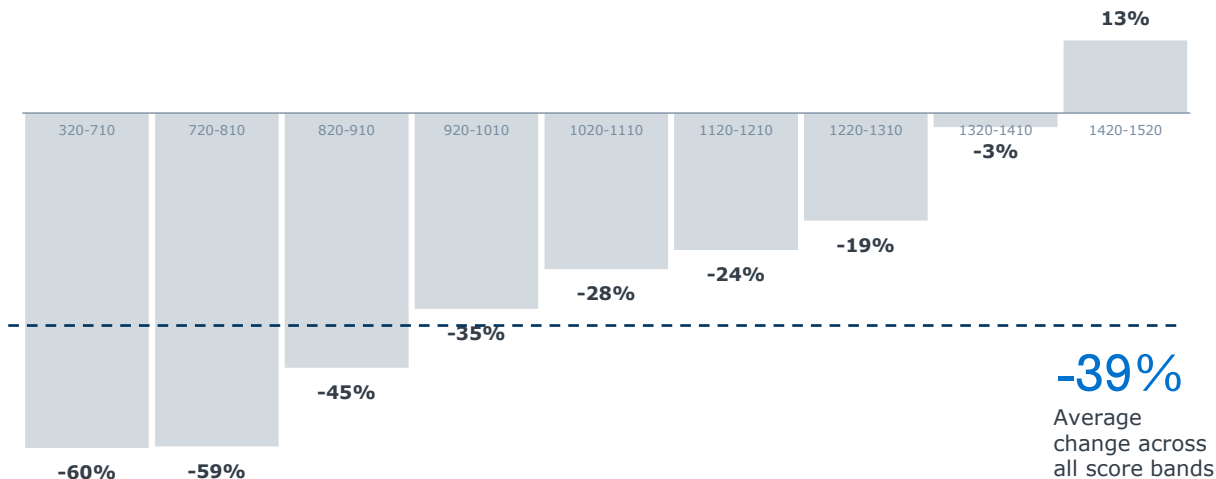
1) N=545,000 total testers

# PSAT Count Declines Hit Lower Scorers More



## Change in 10<sup>th</sup> Grade Availability by PSAT Score Range

*Analysis of Available PSAT Testers,  
December 2023 vs. December 2022*





# Race, Ethnicity Less Identifiable for EC26ers

Big Increase Observed in 'No Response' Option for Latest PSAT Names

## 10th Grade PSAT Tester Availability by Reported Ethnicity<sup>1</sup>

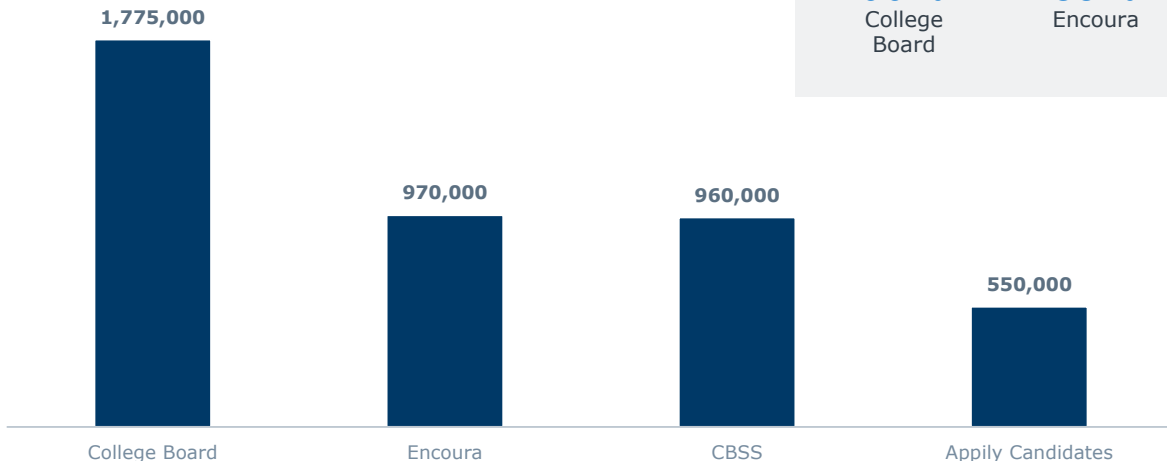
Race/Ethnicity	EC26 Availability	% Decrease vs. EC25
American Indian or Alaska Native	15,000	-60%
Asian	57,000	-45%
Black or African American	61,500	-55%
Native Hawaiian or Pacific Islander	4,500	-55%
Hispanic	109,000	-55%
White	209,000	-55%
<b>No Response</b>	<b>183,000</b>	<b>+130%</b>

1) Students can make multiple selections, so there is some duplication across each race/ethnicity shown above.

# Still Millions of Reachable Juniors



## Availability by Source, EC25



### EC25 Snapshot

**4M+** | across all sources

#### Students with an Assessment

**90%**  
College Board

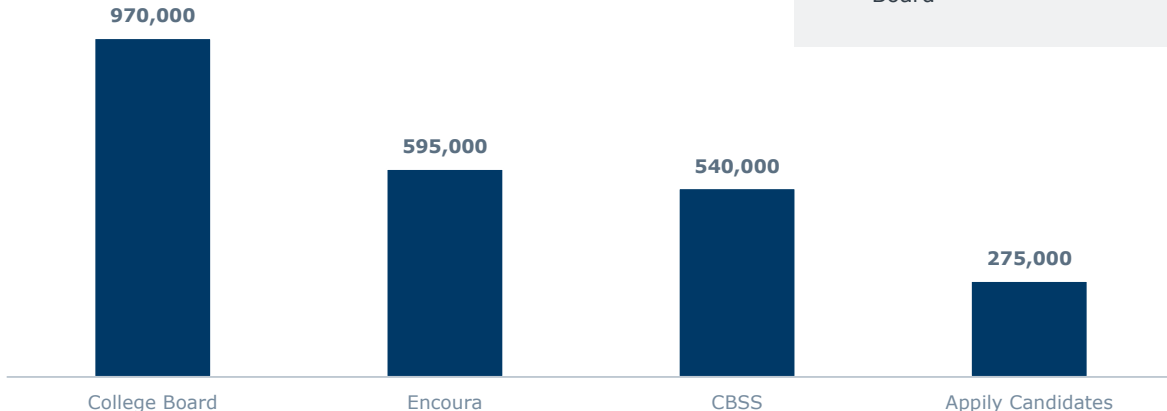
**35%**  
Encoura



# Long Runway Ahead for Sophomores



## Availability by Source, EC26



### EC26 Snapshot

**2M+** | across all sources

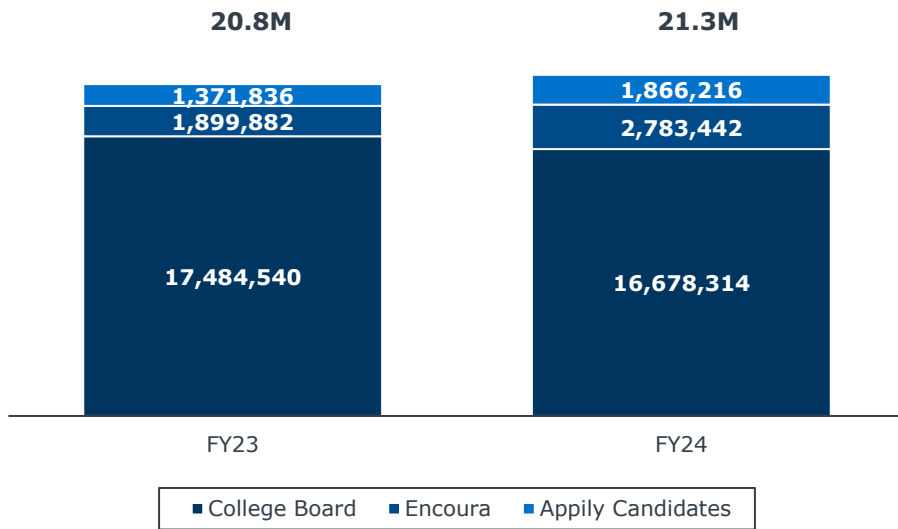
#### Students with an Assessment

**70%**  
College Board

**25%**  
Encoura

# This Year's Total Cultivate Contacts Are Actually Up

## FY24 YTD Total Cultivate Contacts





# Connections Update

Reporting on Early Results



# A Quick Review of Connections

Current Students + Looking Ahead

## Students + Timing

- All students have **PSAT Score**
  - All students in **Entering Class 2025, 2026 or 2027**
  - Portion of students are **ONLY** available through Connections
  - Key moment of engagement: **November PSAT score release**
- 

### Impact Assessments:

SAT School Day: Apr, May, Oct, Nov

PSAT10, PSAT: Apr, May, Nov

### Important Dates:

April 4 & 18

May 2 & 16

*November 4 & 14\* estimated*

## Latest College Board Updates

- 1,000+ schools have subscription plan
- 500+ have Connections active
- 1.6M+ students downloaded the app and opted into Connections
- *800K students uniquely in Connections and **NOT** in Search*

## Observations from This Year's Implementation

- Yes - students are in the app! Yes – some continue to use after score release!
- Schools with bigger brand and audiences tend to have higher engagement
- 10<sup>th</sup> graders (2026) are “engaging” at higher rates than 11<sup>th</sup> graders
- Increased activity observed when new messages go live

# Significant Early Awareness Stats from EAB Partners

## Aggregate Engagement Across All EAB-Run Connections Launches<sup>1</sup>

70K+

Message Saves

“Across all messages sent by your org, count that have saved by students. **Each student can save a unique message once.**”

30K+

College Saves

“Count of times your org has been saved by students. **Each student can save an org once.**”

275K+

Profile Views

“Count of unique users who have viewed your profile. **Students can view your profile unlimited times.**”

1) N=170 EAB partners



# Forecasting Campaign and Enrollment Impact

An Extrapolation from 75 FY24 Cultivate Partners with Connections

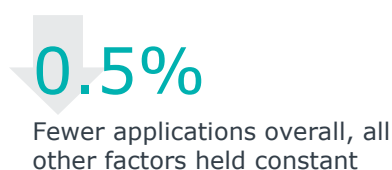
## Actual Cultivate Engagement Impact, FY24 YTD

*Sophomores and Juniors*



### Extrapolated Application Impact in FY25

*(Assuming Connections Responder Equivalence to Other Cultivate Responders)*





# What's Next

Takeaways for the Upcoming Cycle





# Key Questions for the Upcoming Cycle



1. Will there be fewer EC2025 qualified students?
2. Should I be concerned about future classes?
3. What do I need to do to be positioned for success?

# Will There Be Fewer EC25 Qualified Students?



*Probably Not*



## The Complexities

- Estimated decline, students with SAT appended
- Expect decline overall compared to Entering Class 2024
- New world of student availability still taking shape



## Staying on Course

- EC25 flat YoY – total availability
- Large % have PSAT score
- AP testing + opt-ins could have impact
- Total availability goal: 2 Million

# Using Georgia as a Test Case

## SAT Changes Not Impacting Overall Availability in FY25

### Georgia Testing in Brief

- 120-125K high school graduates annually<sup>1</sup>
- No College Board state-funded assessments
- 60K+ SAT test-takers
- Only 20-25% of SAT test-takers are School Day testers



### SAT Availability in Search

Class	Students With SAT January	Students With SAT May
2023	10,000	30,000
2024	14,000	37,000
2025	14,000	29,000

]-20-25%

1) WICHE Knocking at the College Door total high school graduate estimates, class of 2024.

# Using Georgia as a Test Case

## SAT Changes Not Impacting Overall Availability in FY25

### Georgia Testing in Brief

- 120-125K high school graduates annually<sup>1</sup>
- No College Board state-funded assessments
- 60K+ SAT test-takers
- Only 20-25% of SAT test-takers are School Day testers



### Total Availability in Search

Class	Total Availability January	Total Availability May
2023	63,000	70,000
2024	80,000	86,000
2025	82,000	85,000

} FLAT

1) WICHE Knocking at the College Door total high school graduate estimates, class of 2024.

# Should I Be Concerned About Future Classes?



...Maybe



## The Complexities

- EC26 is first class seeing biggest impact from Connections
- Decline in appended PSAT compared to previous classes<sup>1</sup>
- Still unknown who are the available students? When will they opt-in?



## Tracking + Analyzing

- EC26 running behind
- Lower % have PSAT score
- AP testing + opt-ins will have impact
- Total availability goal: 1.5 Million

1) Except for during COVID – an unexpected impact on testing availability.

## Key Moments of Measurement in 2024

**March:** How is build looking?

**April:** 11<sup>th</sup> Grade SAT School Day

**April:** 10<sup>th</sup> Grade PSAT10

**May:** Full scope of Spring SAT

**May:** 10<sup>th</sup> Grade PSAT10

**June:** National SAT impact

**July:** AP testers + impact

# Strategic Positioning for EC25 and Beyond



## Six Imperatives for **Successful Audience Strategy** in an Era of Disruption

Diversify within College Board's portfolio of options and sources

Build on key awareness channels to enrich your ecosystem

Diversify beyond College Board to other high-quality audience sources

Collaborate with your EAB Strategic Leader on a long-term audience plan

Embrace non-assessment options as opportunities to expand reach

Stay abreast of continued changes in the market

# Thank you!

Connect with EAB



@EAB



@eab\_



@WeAreEAB

