



Beyond the Traditional Funnel

Building a Recruitment Pipeline for Resilience and Growth

Traditional Undergrad Addressable Market



Addressable

70%

Educational
Intentions
Identified

Primary

Direct Marketing Leads

Supported By

Digital • Broadcast • Brand

What to Watch

List Source Volatility
Student Behaviors



Not Addressable

30%

Educational
Intentions
Unknown

Primary

Digital & Broadcast Leads

Supported By

Direct Marketing

What to Watch

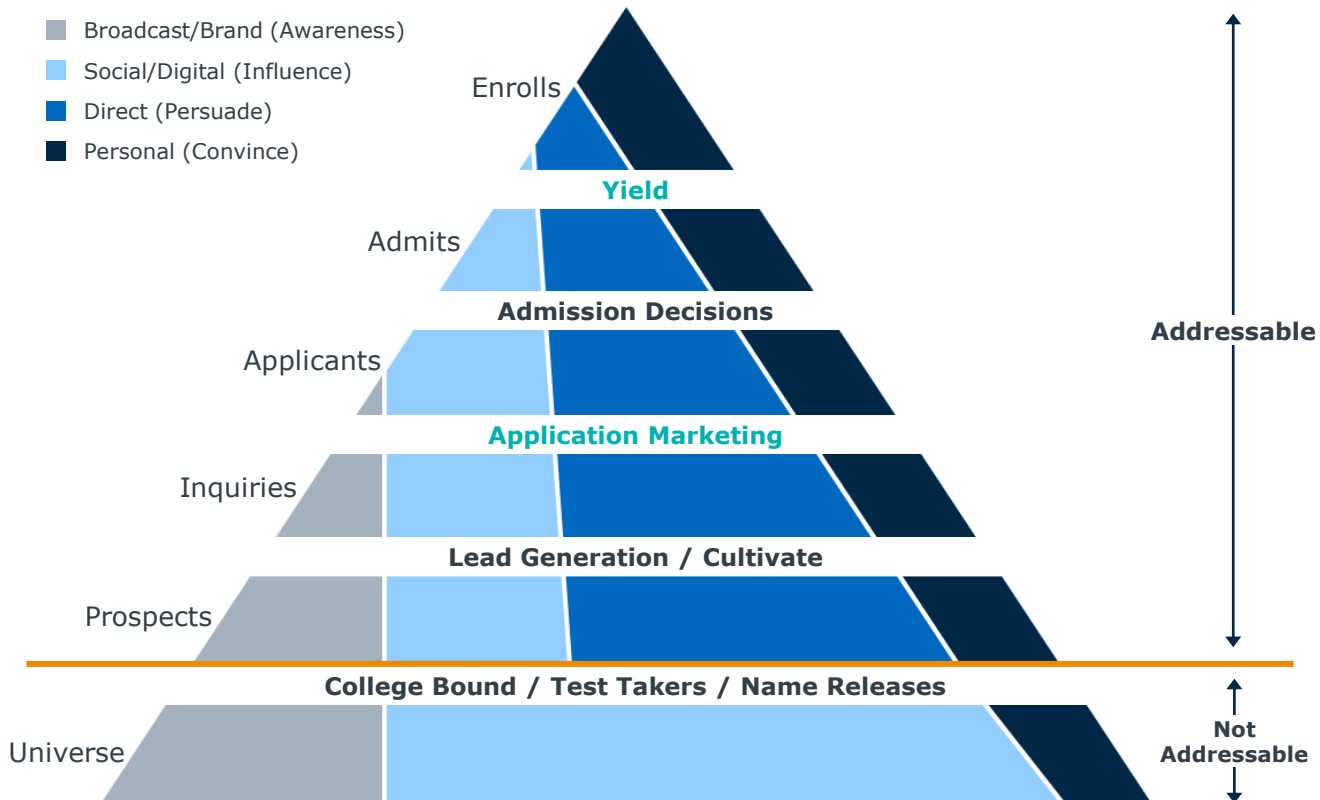
Digital Access
Channel Effectiveness

The **Addressable Market** is not **Unlimited**.
Every recruitable student matters.

The Right Channel at the Right Stage



- Broadcast/Brand (Awareness)
- Social/Digital (Influence)
- Direct (Persuade)
- Personal (Convince)



ACT **acquired**
NRCCUA

Privacy impacts sources

Encoura & College Board
switched to **subscriptions**

ACT **stopped**
offering ACT PLAN

Privacy impacts testing

ACT **launches** Underserved
Student Initiative

Privacy impacts criteria

Legal issues for ACT
state-funded testers

New **platforms** for ACT,
NRCCUA & College Board

College Board
launches **PSAT10**

College Board stops
collection of **citizenship**

Times Have Changed

ACT **splits** from
Encoura

Privacy impacts timing

NRCCUA **changed**
to Encoura

College Board **updates**
SAT/PSAT scoring

Privacy impacts availability

College Board **removes**
Race/Ethnicity

SAT/ACT **concordance**
multiple releases

ETS **acquires** ACT

Privacy impacts access

COVID &
assessment access

College Board updated
collection of **religion**

A New Market Requires a New Approach



Tester Centric Market

- Tester participation drove Audience Strategy
- College Board focus: SAT, PSAT or AP
- ACT independently sold student records

Market in Transition

- COVID disrupted national and School Day testing
- College Board introduced Non-Assessment students
- ACT testers available only through Encoura

Multi-Source Marketplace

- Testing participation is recovering
- Privacy for students continues to evolve
- Each source requires unique strategies

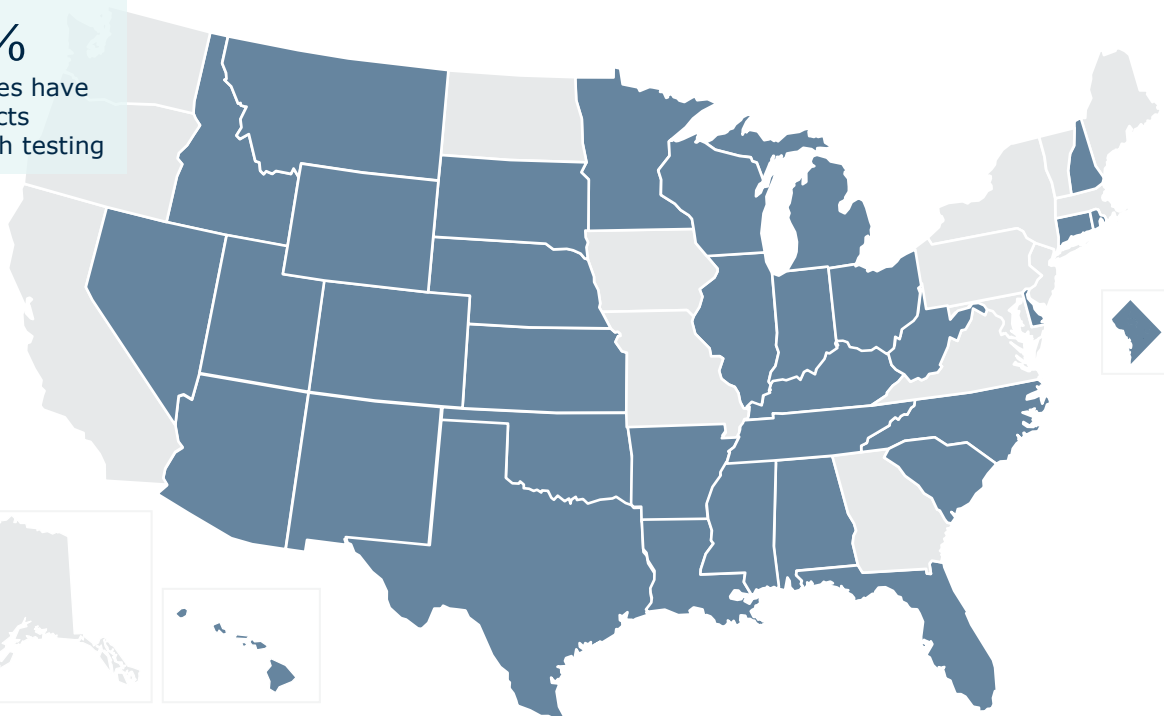
Testing Policies Influence Student Availability



State contracts impact **Who** is available and **Where** they are available

70%

of states have
contracts
through testing



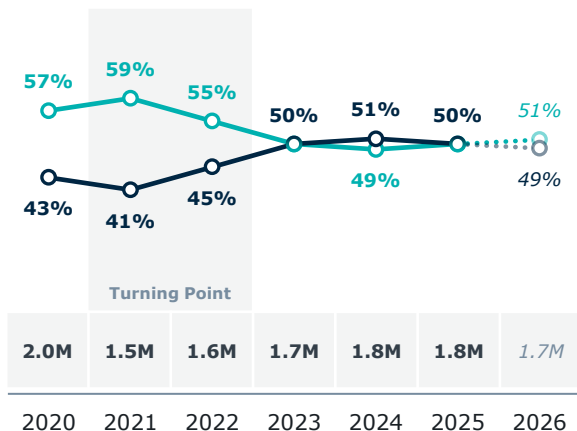
Testing Trends Are Reshaping the Student Market



Distribution of Total SAT and ACT scores over time

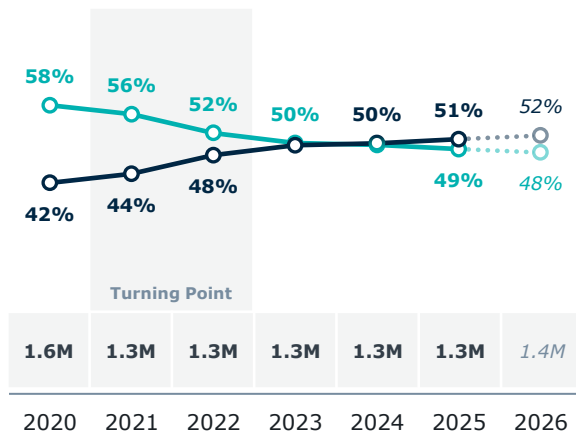
SAT

1000-1600 400-990



ACT

19-36 1-18



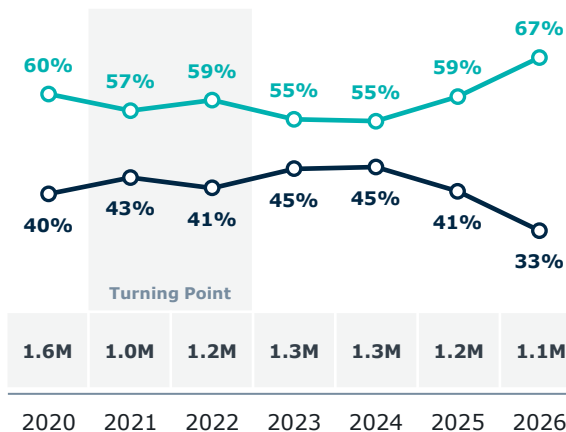
Available Testers Tell a Different Story



Distribution of Recruitable SAT and ACT scores over time

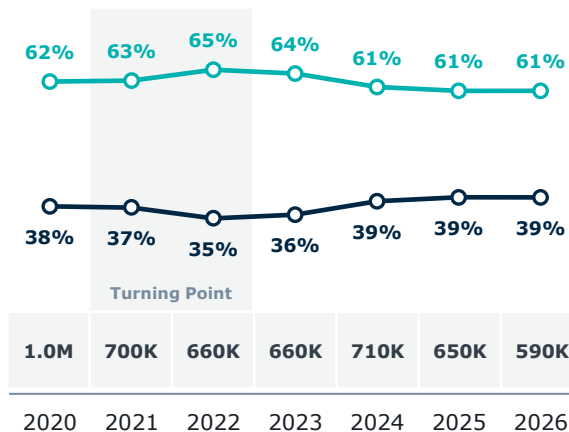
SAT

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ACT

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Three Strategic Priorities for Today's Market

Today's marketplace requires a different approach



**Data-Driven
Markets**



**Diversified
Sources**

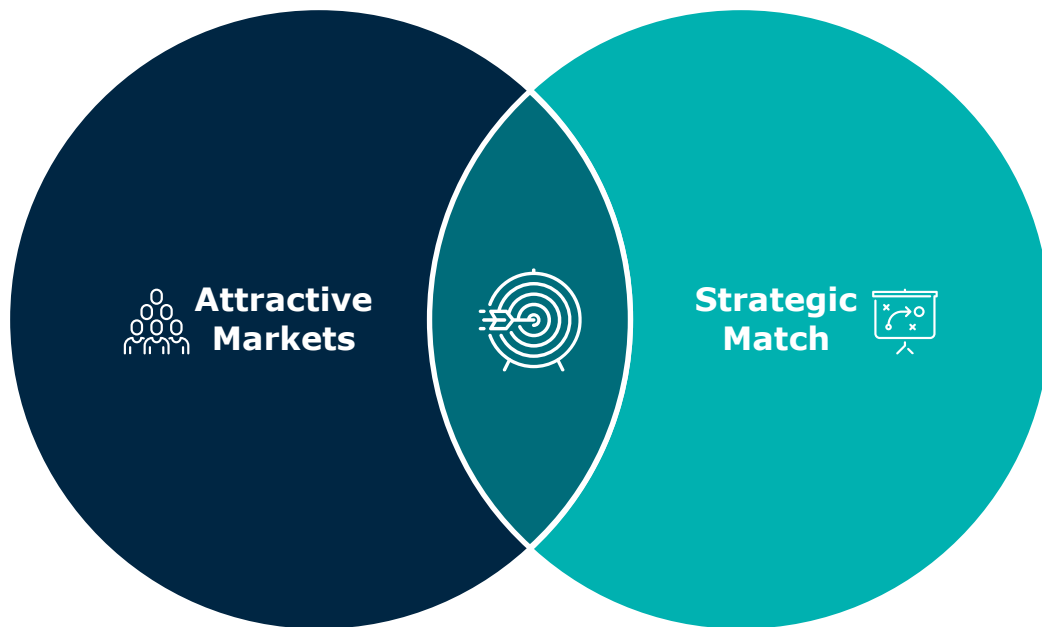


**Coordinated
Digital**

Focus Where Opportunity Meets Institutional Fit



Attractive Markets vs. Strategic Markets



How We're Building Smarter Audience Strategies



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Build - Model

Market Intelligence

- Historical Enrollment
- Student Behavior
- Demographics
- Market Characteristics

Decisions begin with
comprehensive
market intelligence



Evaluate - Score

Institutional Objectives

- Strategic Markets
- Market Opportunities
- Enrollment Goals
- Student Profile

Markets are evaluated
through the lens of
institutional fit



Prioritize - Execute

Audience Strategy

- Geographic Priorities
- Recruitment Territories
- Audience Allocation
- Campaign Strategy

Recruitment resources are
focused on their
greatest impact

No Single Source Reaches Every Student

Each source expands recruitment opportunity in different ways



Illinois Class of 2026: 135,000



College Board: 55%



Encoura: 45%



Apply Prospects: 40%



Why it matters

- Reduce single source dependence
- Expand student reach
- Build a resilient recruitment strategy

Specialized Recruitment Requires Layered Audiences

Purpose-built audiences are created by combining multiple student signals

Institutional Goal: Increase Rural STEM Enrollment



**Major/Career
Interest**

+



**Geographic
Market**

+



**Academic
Profile**

+



**Interests/
Activities**

+



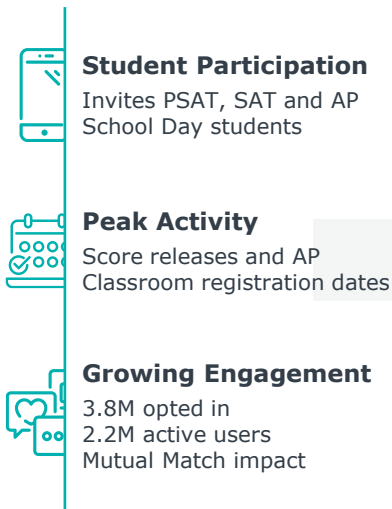
**Student
Behavior**

Smaller niche populations require
broader thinking—not broader buying.

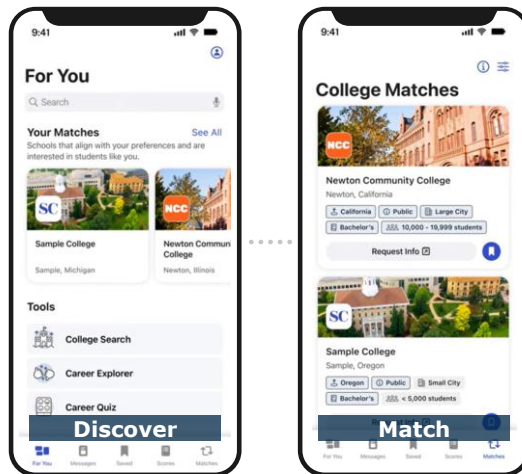
Connections: Where Students Discover Colleges



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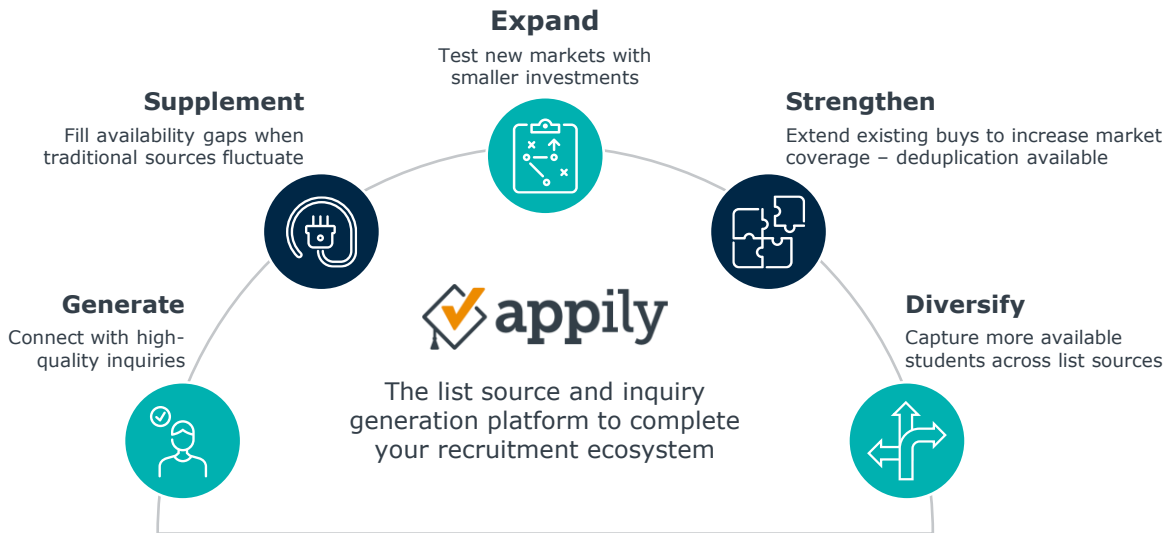
Connections Experience



**Create earlier opportunities to
engage students as they discover colleges**

Flexible Student List & Inquiry Generation Platform

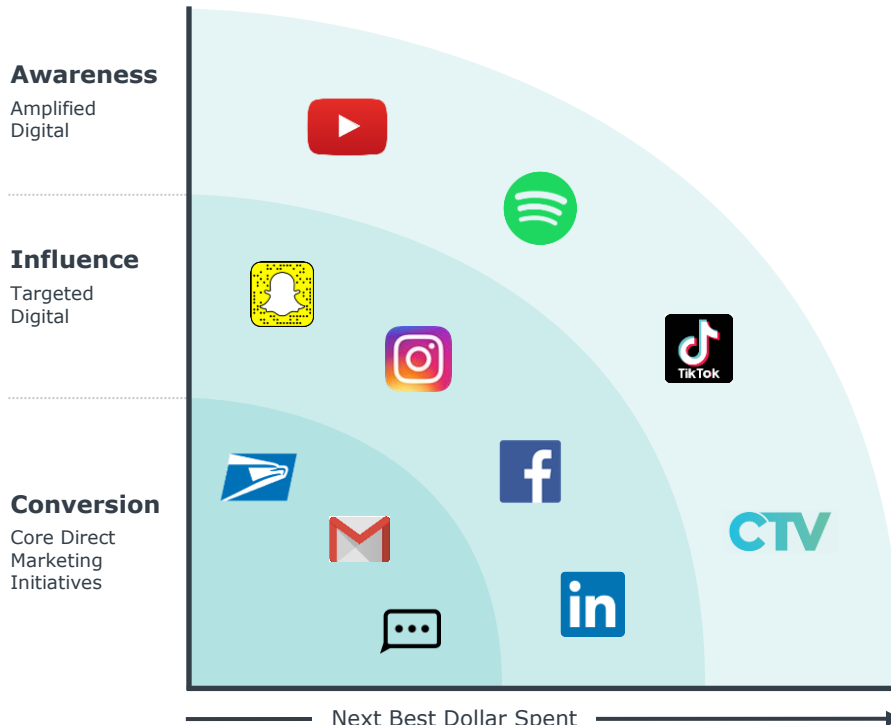
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Expanding Influence Across Channels



Each channel plays a role in awareness, influence, and conversion



Building A Modern Recruitment Strategy



Embrace Change



Build Resilience



**Understand Your
Market**



**Diversify Student
Outreach**



**Align Channels to
Strategy**