



EAB

College Search Trends Across Space and Time

Contextualizing Your Place in Higher Ed's Shifting Landscape

Today's Presenter



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Connecting to Audio



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Asking a Question



Brief Exit Survey



We'd appreciate your **feedback** on today's presentation.



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INSTITUTIONAL STRATEGY

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



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



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



Powered by the Leading Student-Facing Platforms



An Insight Paper on Today's Topic

This Session Consists of Highlights from a More Extensive Resource



INSIGHT PAPER

College Search Trends Across Space and Time

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

50+ pages of guidance on preparing for the enrollment landscape of the near future

Section 4 – Recent Student Mobility Trends

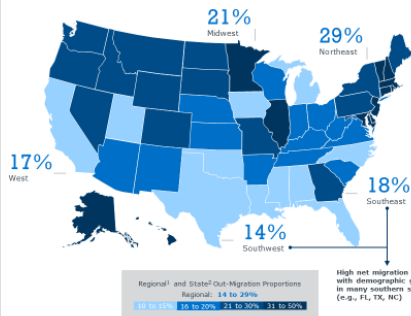
A North-South Divide in Out-Migration

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., NY, 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, Retention, and Graduation Data, 2017-2020.

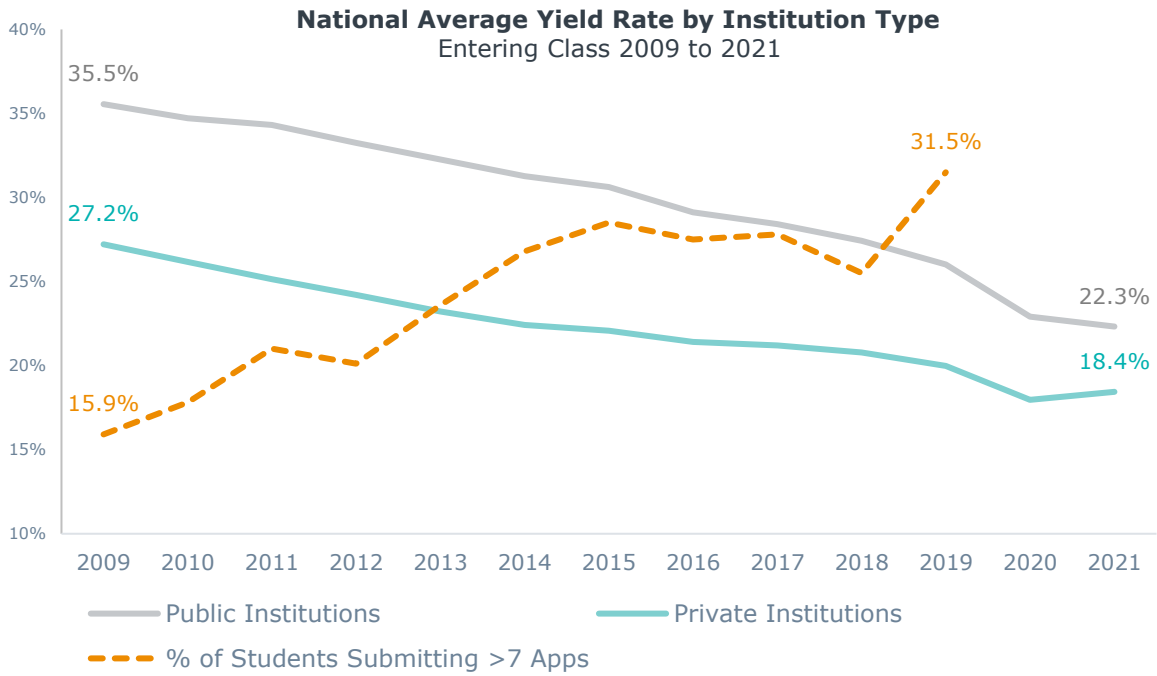
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- 1 Recent Application Trends
- 2 Recent Enrollment Trends
- 3 Current Inquiry Trends

National Average Yield Rate Has Declined Every Year Since 2009

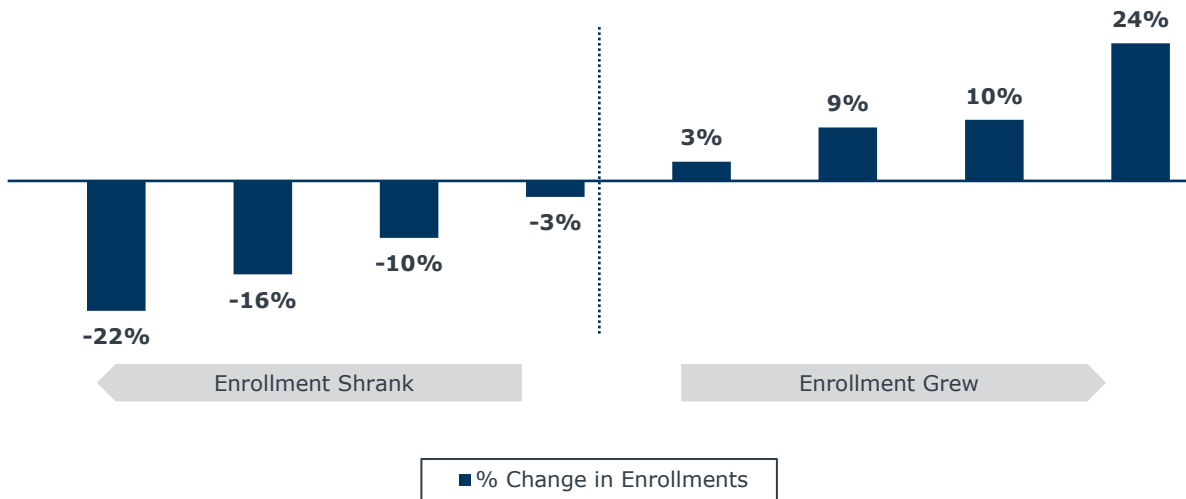


Source: IPEDS and UCLA Freshman Survey

Change in Enrollment



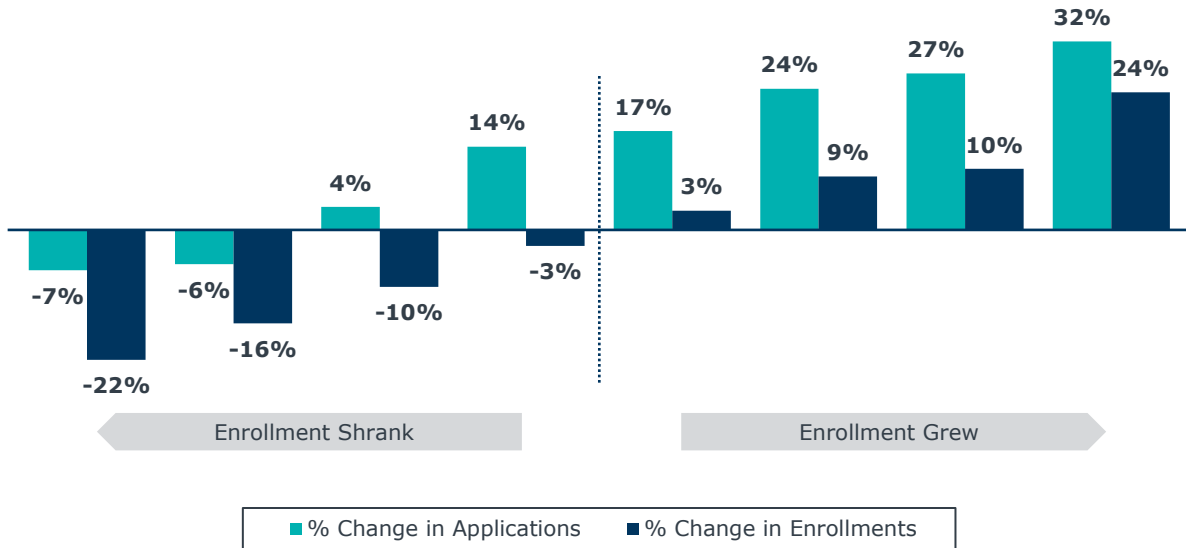
Change in Enrollment Growth for 4-Year Institutions from 2017 to 2021



- 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.

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

Change in Application Volume for 4-Year Institutions from 2017 to 2021 by Enrollment Growth

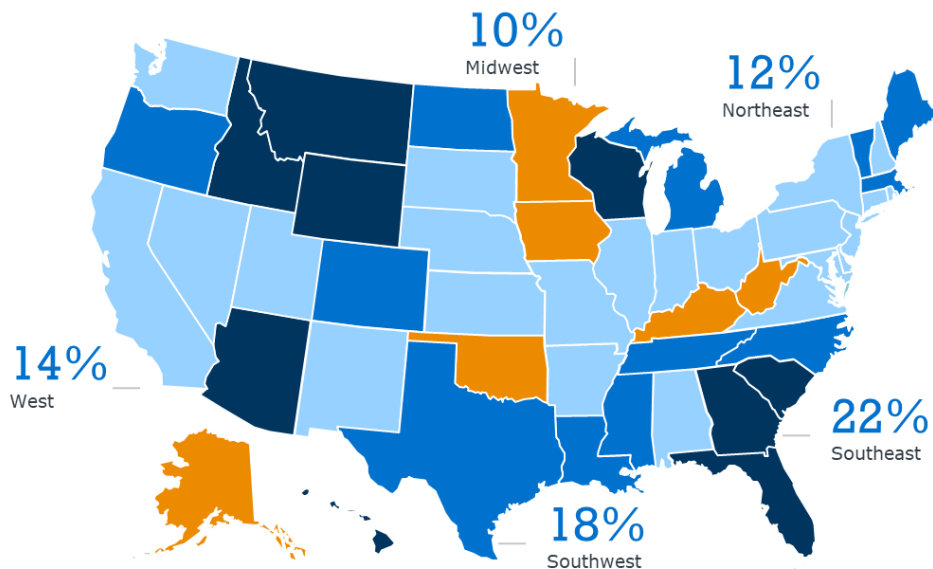


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Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

Unequal Growth in Application Volume

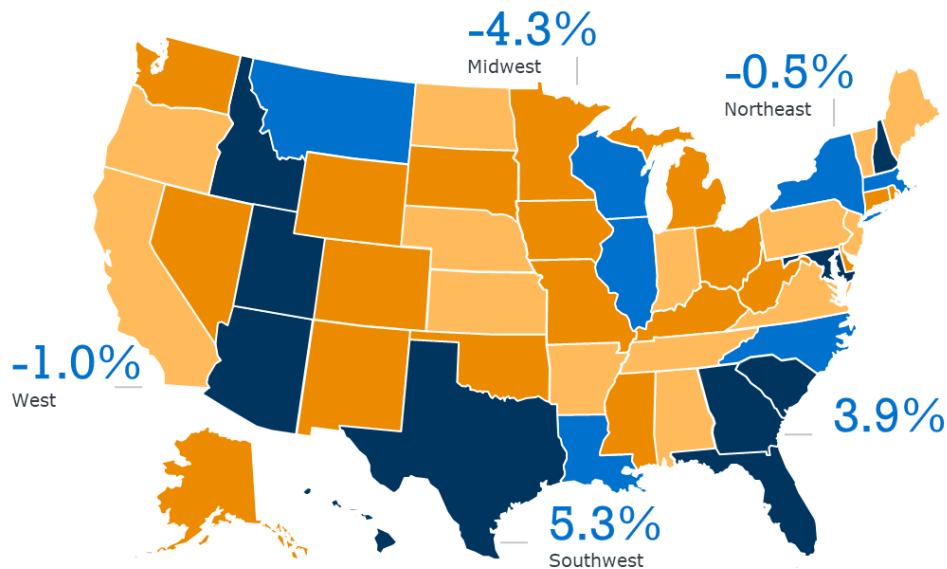
State-by-State Variation in College Application Volume



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Enrollment Down in Most—but Not All—Places

State-by-State Variation in College Enrollment Volume



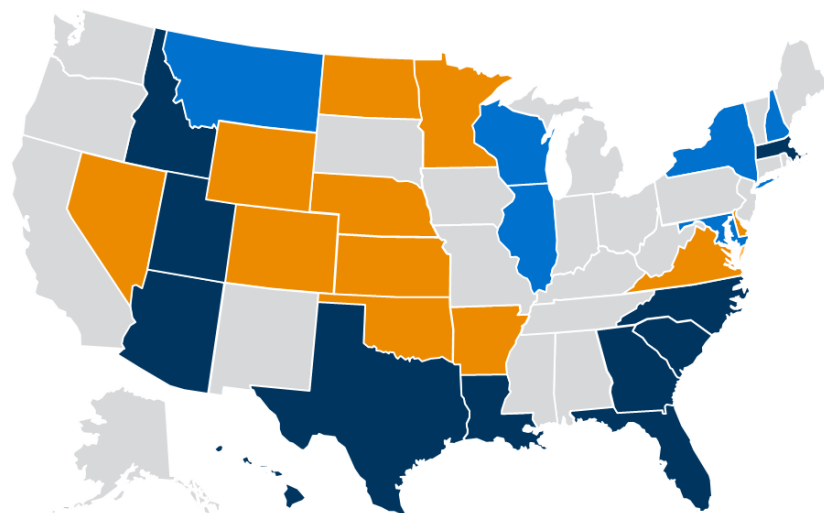
Regional and State Changes

-4.3 to 5.3%

Under -5% 5 to 0% 1 to 5% Over 5%

Overlapping Shifts in Demographics¹ & Enrollment

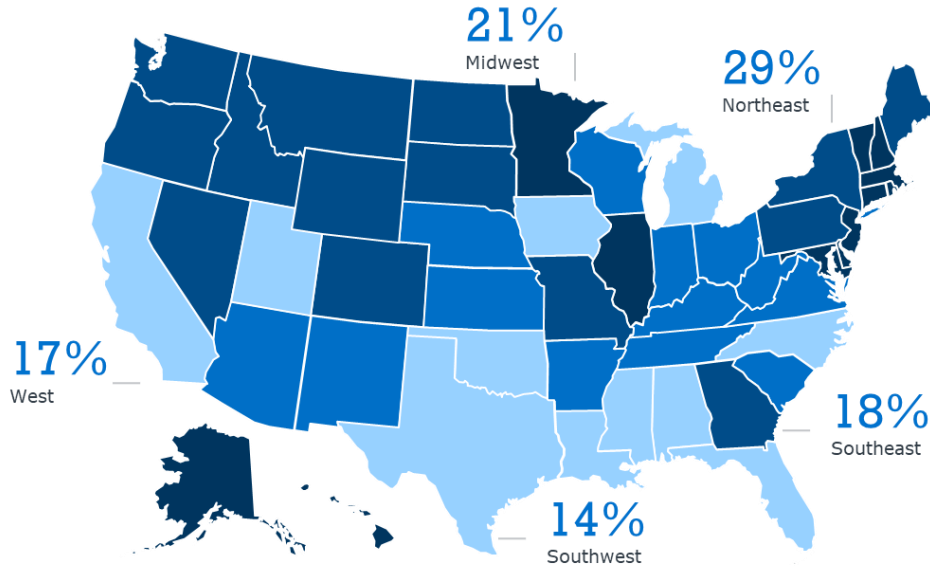
They're a Major Force Influencing Enrollment Trends, but Not the Only One



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

A North-South Divide in Out-Migration

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



Regional¹ and State² Out-Migration Proportions

Regional: **14 to 29%**

10 to 15%	16 to 20%	21 to 30%	31 to 50%
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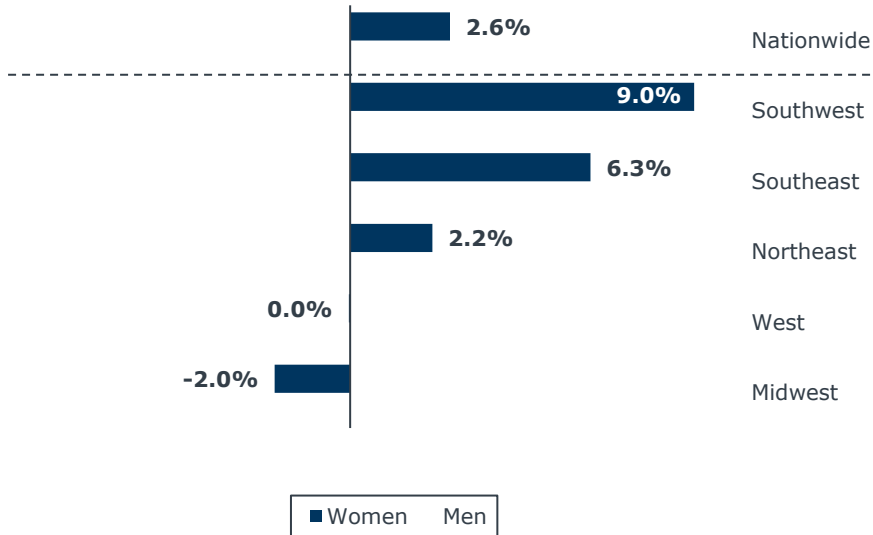
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Source: EAB Analysis of IPEDS Fall Enrollment, Admissions, and Institutional Characteristics Datasets, 2017-2021.

A Growing Gender Gap in Enrollment



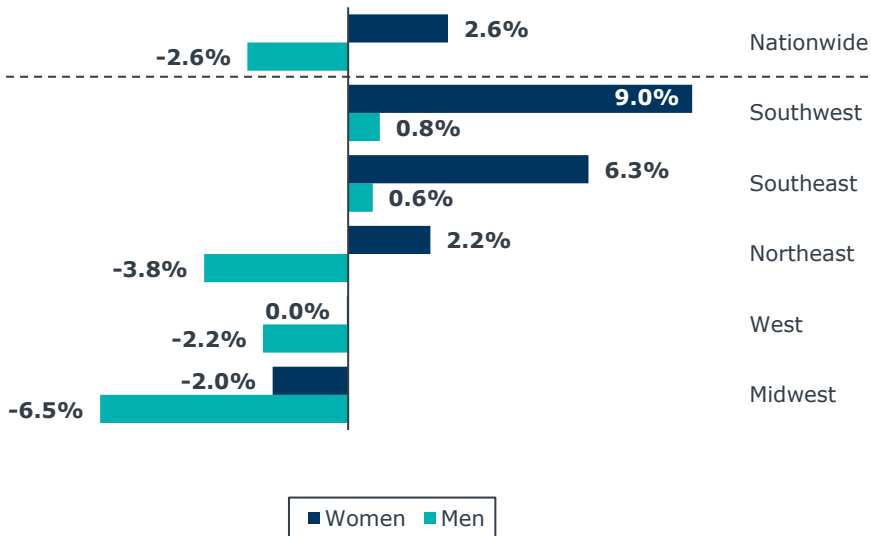
Regional and Gender Variation in College Enrollment



A Growing Gender Gap in Enrollment



Regional and Gender Variation in College Enrollment



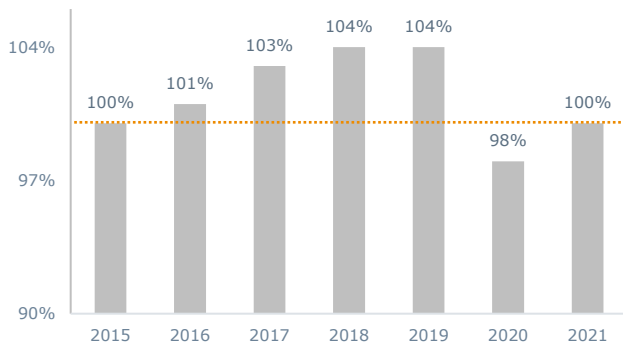
Indexed Change in First Year Enrolls

Public and Private Institutions

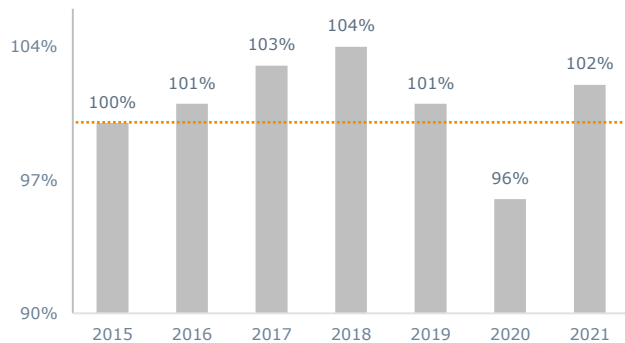
Entering Class 2015 to 2021, Indexed Relative to 2015



Public Institutions



Private Institutions



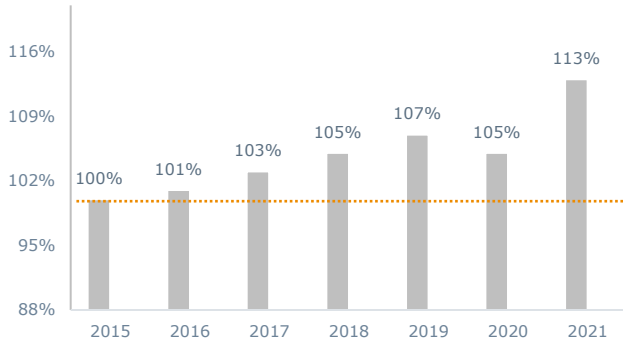
Indexed Change in First Year Enrolls

Public and Private Institutions by Size

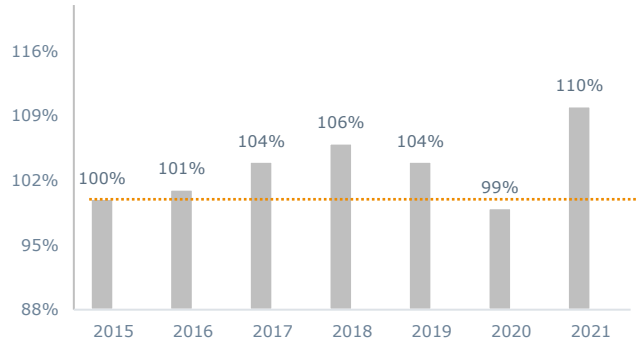
Entering Class 2015 to 2021, Indexed Relative to 2015



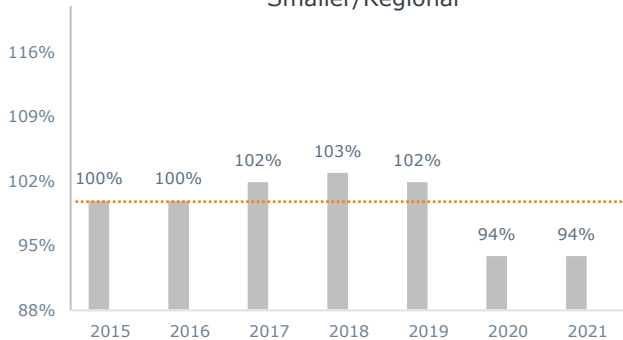
Public Institutions Large/Flagship



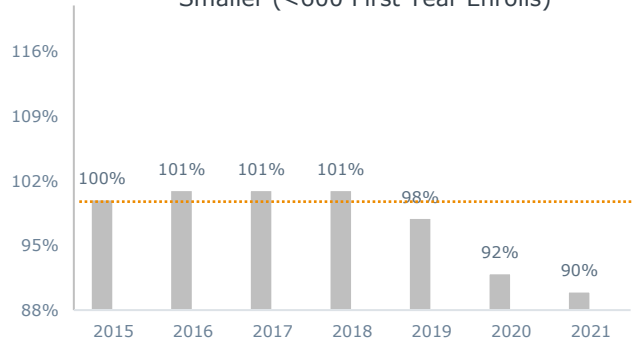
Private Institutions Larger (>600 First Year Enrolls)



Smaller/Regional



Smaller (<600 First Year Enrolls)



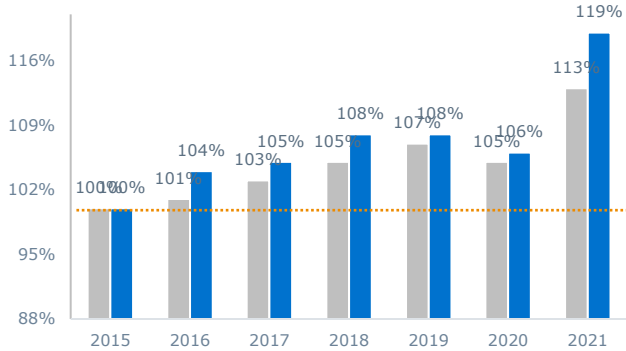
Source: IPEDS

Indexed Change in First Year Enrolls

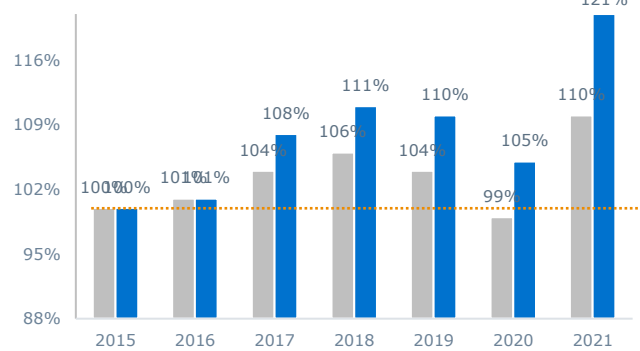
Public and Private Institutions by Size (Market Avg vs EAB Partner Avg)
 Entering Class 2015 to 2021, Indexed Relative to 2015



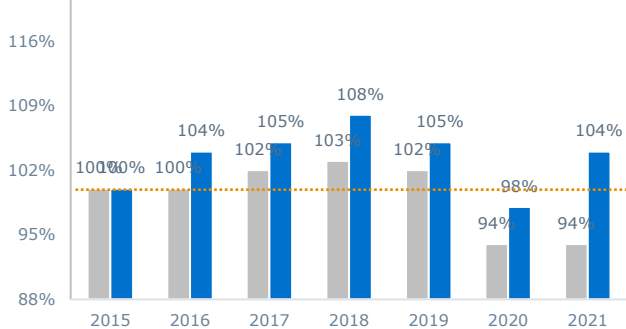
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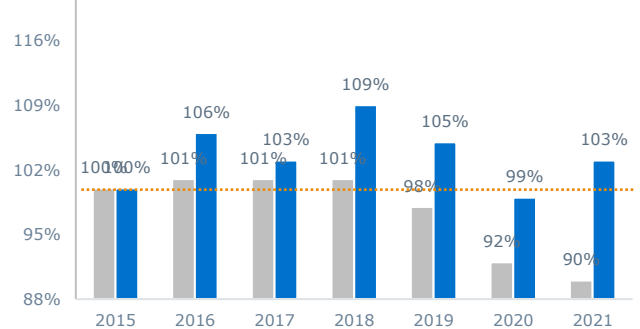
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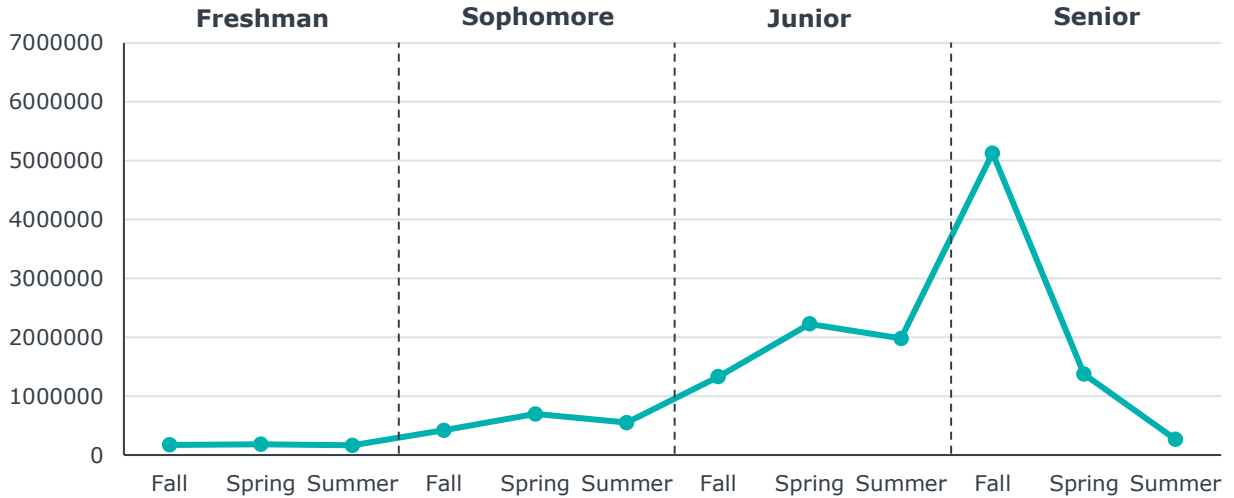
Source: IPEDS

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Students Are Inquiring Later



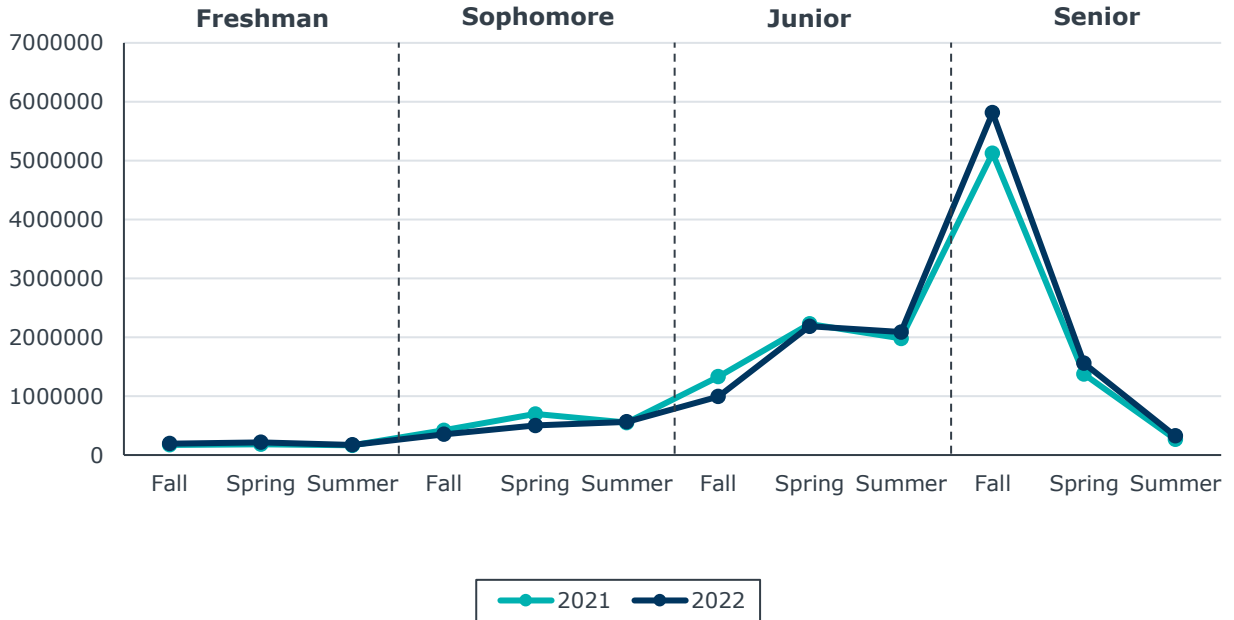
Timing and Volume of Inquiries from Classes of 2021



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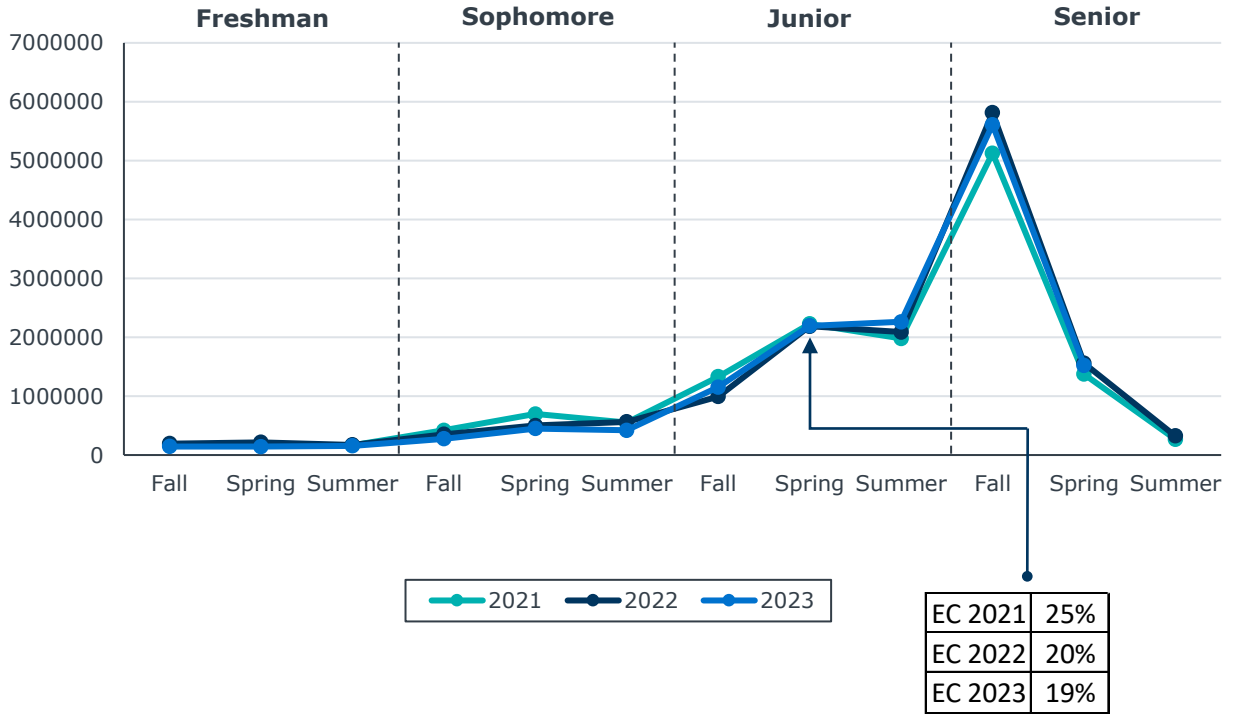


Timing and Volume of Inquiries from Classes of 2021 and 2022



Students Are Inquiring Later

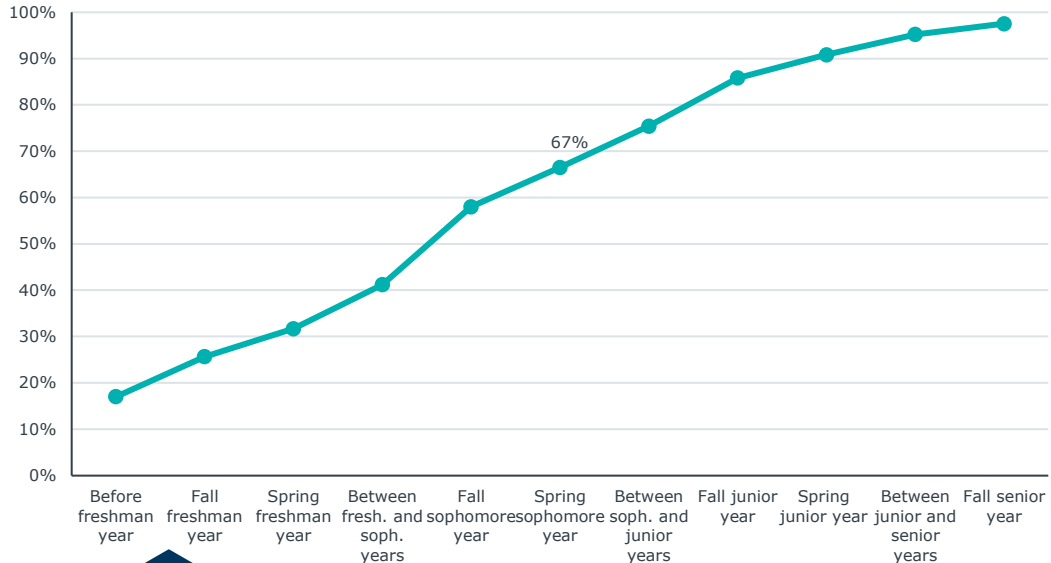
Timing and Volume of Inquiries from Classes of 2021 to 2023



Timing of Recruitment Behaviors Is Shifting

“When did you first start researching colleges?”

Cumulative Percentage of Students Who Had Started Researching by Time Period, Communication Preferences Survey



Students are starting to research schools later

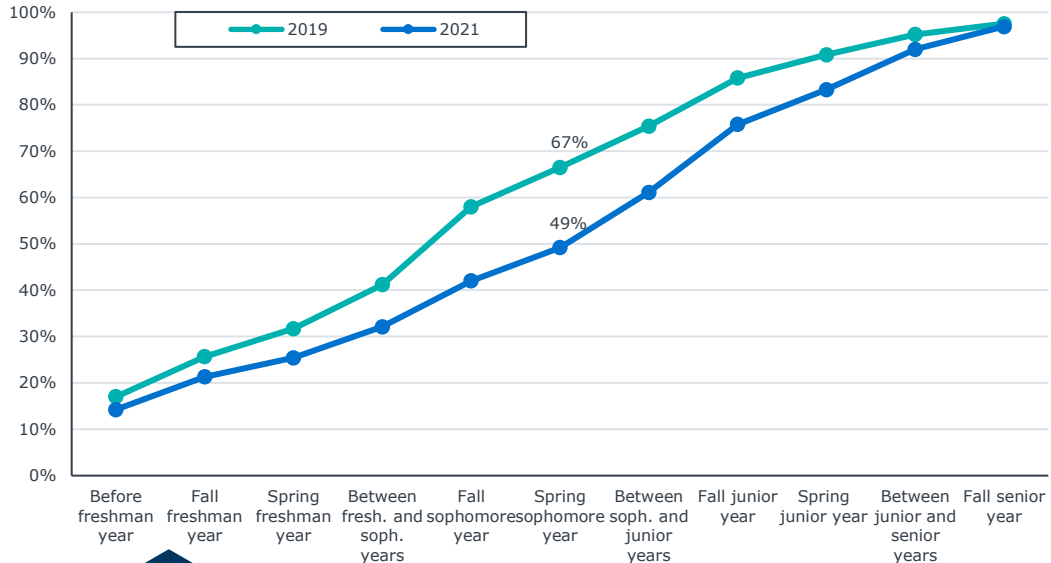
Students are delaying visits until post-admit stage

Students are often considering more options for longer

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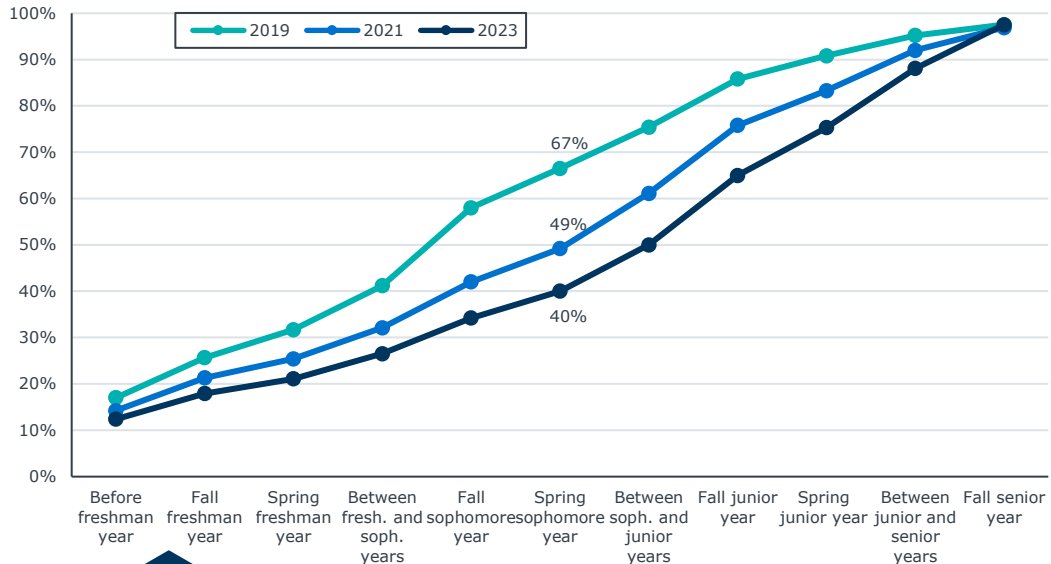
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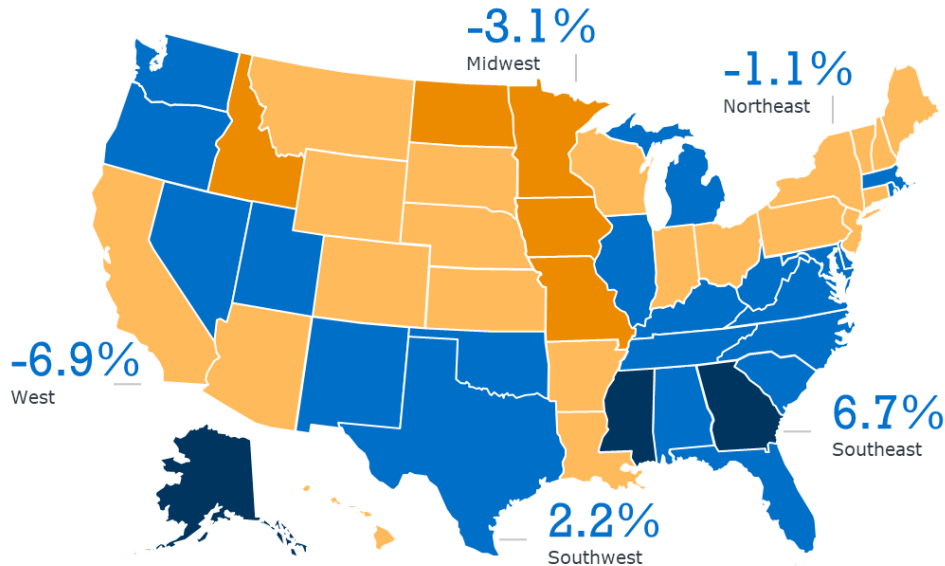
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Inquiries Trends May Presage Future Enrollment

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



Regional and State Changes

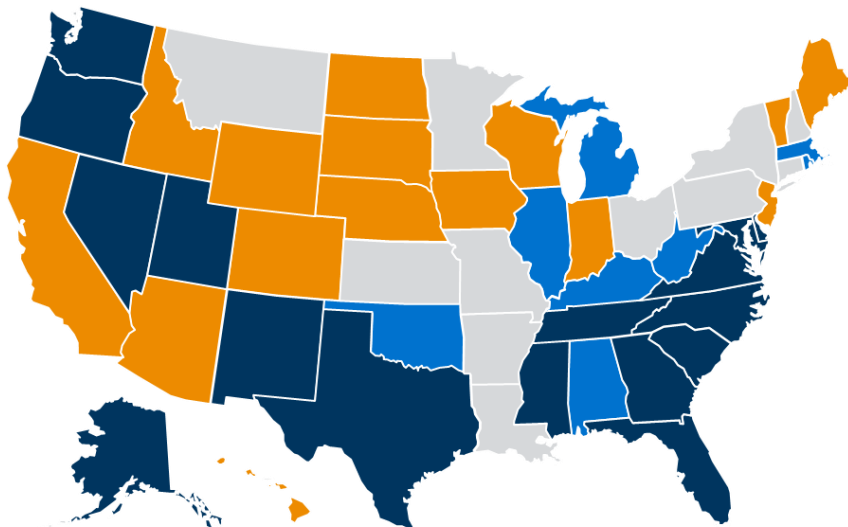
-6.9 to 6.7%

Under -10% -10 to 0% 1 to 10% Over 10%

Demographic Changes' Impact on Inquiry Trends



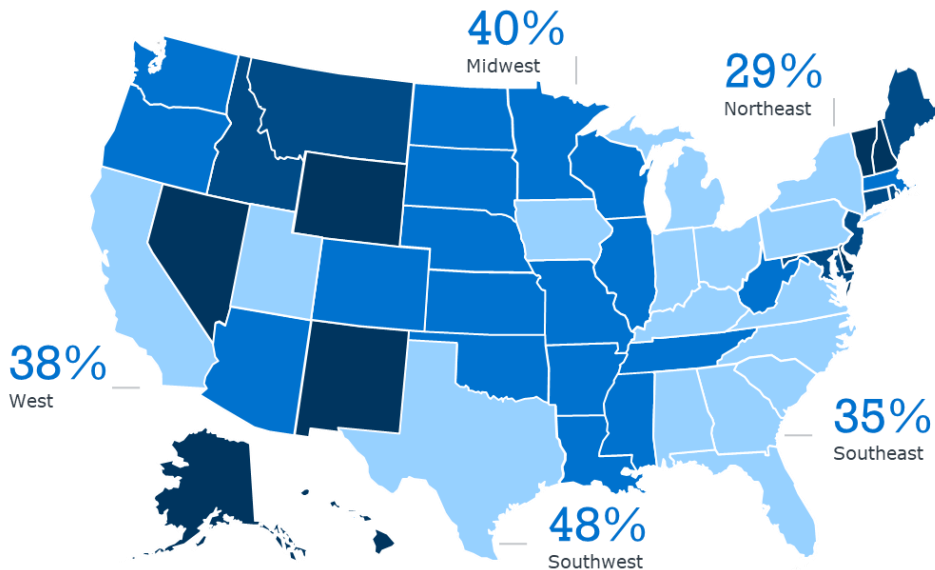
Clear Regional Patterns in How Demographics Influence Student Inquiries



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

Regional Patterning of Outgoing Student Inquiries

Inquiries Students Sent Out-of-State and Out-of-Region



% Out-of-Region¹ and Out-of-State² Inquiries

29 to 48%

41 to 60% 61 to 70% 71 to 80% 81 to 90%

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.

Three Main Takeaways

1 Application growth is imperative to combat declining yield trends

2 Enrollment skew favors size and selectivity

3 Notable changes in timing of college Search behavior


I'd Like to Speak More About...

1 How to get in front of students who are seriously considering my competitors

2 How to maximize my chances of converting my prospects into inquiries

3 How to grow my applicant pool to offset increasing competition

4 Other (write in the Q&A box)



Choose all that apply

Additional Resources Available to You



Request a copy
of the webinar **recording and slides**



Set up some time
to **talk with Ian**



Request a copy
of the **insight paper**

*Submit your
request in the
survey at the
end of the
webinar*



Ian Watt

Executive Director of Partner Success

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