



EAB

# Results from Our Survey of 120+ Enrollment Leaders

Top-of-Mind Topics in Higher Ed Enrollment

# Using Zoom

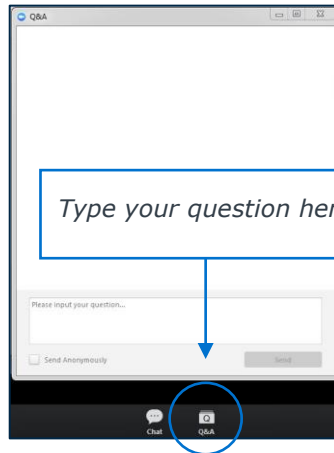
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## Connecting to Audio



Refer to the **webinar confirmation email** you received in your inbox.

## Asking a Question



## Brief Exit Survey



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

# Today's Presenters



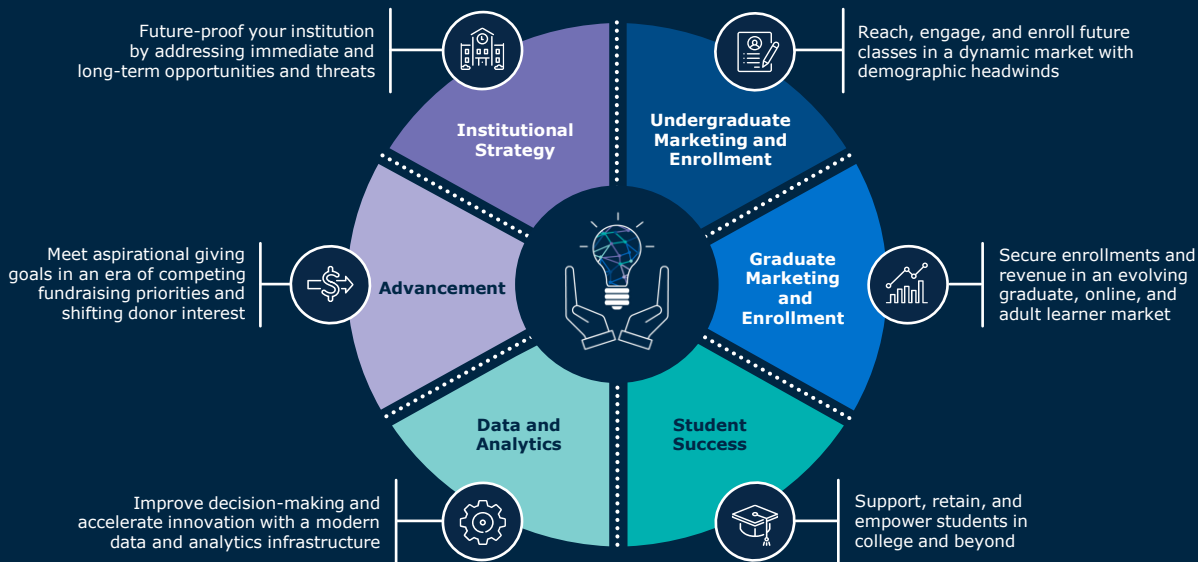
**Erica Johnson**

*Senior Consultant and Principal,  
Enrollment Marketing Services*



**Ali O'Hara**

*Associate Director, Partner  
Development*

**Insight-powered Solutions** for Your Top Priorities and Toughest Challenges

We partner with **2,800+** institutions to accelerate progress, deliver results, and enable lasting change.

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

# EAB's 2025 Enrollment Research Topic Poll



## Profile of Poll Respondents and Participating Institutions



**41%**

of respondents  
were VPs



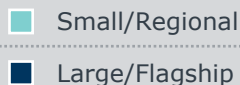
**127**

institutions  
participated

*By  
Institution Type*



*By  
Size*



*Total undergraduate enrollment*

*Fewer than 3,200*

*More than 3,200*

# Cuts of the Data We'll Be Looking at Today

## Segments Based on School Type and Size



Private		Public	
Small	Large	Small/Regional	Large/Flagship
39%	10%	13%	38%



# 10 Topics Tested in the Survey

Full Text of Topics as They Appeared on the Poll (slide 1 of 2)

**Q: “Which 5 topics best address the most pressing issues facing your institution?”**

- 1 The Many Faces of **College ROI**  
*How to Communicate Value Differentially by Academic Program and Audience*  
.....
- 2 Which **College Affordability Initiatives** Actually Drive Enrollment?  
*Examining the Impact of Tuition Resets, Financial Aid Innovations, Transparency Measures, Value Messaging, and More*  
.....
- 3 Beyond the Hype: **Deconstructing the Demographic Crisis** (Cliff)  
in Higher Ed Enrollment  
*Census Data Insights on the Real Impact of Demographic Shifts on College Enrollment Trends*  
.....
- 4 How Do You Compete in an Oversaturated Market?  
*Using Institutional Personas to **Identify What Sets You Apart** and Where You Can Grow Recruitment*  
.....
- 5 From Recruitment to Retention  
*Strategies for **Improving Student Success** Through Better Prospect Identification and Post-Enrollment Support*

# 10 Topics Tested in the Survey



## Full Text of Topics as They Appeared on the Poll (slide 1 of 2)

- 6 Which Schools Are **Beating the Enrollment Odds**?  
*What Institutional Personas—and the Traits That Define Them—Reveal About Over-Performers*  
.....
- 7 What Fuels **Small College Enrollment Success** Today?  
*Uncovering the Factors Behind Those That Succeed amid Widespread Decline*  
.....
- 8 Are You Focused on the Right Competitors?  
*Analytic Insights into **Who Your Real Competitors Are**, Based on Inquiry Trends and EAB's Institutional Persona Framework*  
.....
- 9 Zero-Sum or Win-Win?  
*Analyzing the **Impact of 'Free College' and Dual Enrollment Programs** on Two-Year and Four-Year Enrollment Dynamics*  
.....
- 10 The Merger Effect  
*How **Small College Consolidations** Impact Enrollment Trends and Institutional Survival*



# Topic Scores



Surveyed Topics, Highest to Lowest Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

1	The Many Faces of <b>College ROI</b>	71%
1	Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	71%
3	<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	62%
4	How Do You Compete in an <b>Oversaturated Market</b> ?	58%
5	From Recruitment to <b>Retention</b>	54%
6	Which Schools Are <b>Beating the Enrollment Odds</b> ?	49%
7	What Fuels <b>Small College Enrollment Success</b> Today?	43%
8	Are You Focused on <b>the Right Competitors</b> ?	35%
9	Zero-Sum or Win-Win?	24%
10	The Merger Effect	6%

# Topic Ranking by Respondent Title

Topics Listed from Highest to Lowest for VPs

“Which 5 topics best address the most pressing issues facing your institution?”

	VP (n=52)	Other (n=75)
The Many Faces of <b>College ROI</b>	73%	69%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	67%	73%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	62%	63%
From Recruitment to <b>Retention</b>	60%	49%
How Do You Compete in an <b>Oversaturated Market?</b>	56%	60%
Which Schools Are <b>Beating the Enrollment Odds?</b>	52%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	48%	39%
Are You Focused on <b>the Right Competitors?</b>	35%	36%
Zero-Sum or Win-Win?	35%	16%
The Merger Effect	6%	7%

# Results by Institution Type



Topics Listed from Highest to Lowest Overall Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

	Large Priv. (13)	Small Priv. (49)	Large/Flag Pub. (48)	Small/Reg Pub. (17)
The Many Faces of <b>College ROI</b>	92%	59%	67%	100%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	85%	67%	77%	53%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	69%	55%	69%	59%
How Do You Compete in an <b>Oversaturated Market?</b>	69%	59%	56%	53%
From Recruitment to <b>Retention</b>	62%	55%	50%	53%
Which Schools Are <b>Beating the Enrollment Odds?</b>	54%	47%	50%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	0%	67%	17%	76%
Are You Focused on <b>the Right Competitors?</b>	46%	24%	46%	29%
Zero-Sum or Win-Win?	0%	20%	33%	24%
The Merger Effect	0%	8%	2%	18%

# Comparing Results for Private Schools



Topics Listed from Highest to Lowest Overall Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

	Large Priv. (13)	Small Priv. (49)	Large/Flag Pub. (48)	Small/Reg Pub. (17)
The Many Faces of <b>College ROI</b>	92%	59%	67%	100%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	85%	67%	77%	53%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	69%	55%	69%	59%
How Do You Compete in an <b>Oversaturated Market?</b>	69%	59%	56%	53%
From Recruitment to <b>Retention</b>	62%	55%	50%	53%
Which Schools Are <b>Beating the Enrollment Odds?</b>	54%	47%	50%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	0%	67%	17%	76%
Are You Focused on <b>the Right Competitors?</b>	46%	24%	46%	29%
Zero-Sum or Win-Win?	0%	20%	33%	24%
The Merger Effect	0%	8%	2%	18%

# Comparing Results for Public Schools



Topics Listed from Highest to Lowest Overall Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

	Large Priv. (13)	Small Priv. (49)	Large/Flag Pub. (48)	Small/Reg Pub. (17)
The Many Faces of <b>College ROI</b>	92%	59%	67%	100%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	85%	67%	77%	53%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	69%	55%	69%	59%
How Do You Compete in an <b>Oversaturated Market?</b>	69%	59%	56%	53%
From Recruitment to <b>Retention</b>	62%	55%	50%	53%
Which Schools Are <b>Beating the Enrollment Odds?</b>	54%	47%	50%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	0%	67%	17%	76%
Are You Focused on <b>the Right Competitors?</b>	46%	24%	46%	29%
Zero-Sum or Win-Win?	0%	20%	33%	24%
The Merger Effect	0%	8%	2%	18%

# Comparing Results for Large Schools

Topics Listed from Highest to Lowest Overall Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

	Large Priv. (13)	Small Priv. (49)	Large/Flag Pub. (48)	Small/Reg Pub. (17)
The Many Faces of <b>College ROI</b>	92%	59%	67%	100%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	85%	67%	77%	53%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	69%	55%	69%	59%
How Do You Compete in an <b>Oversaturated Market?</b>	69%	59%	56%	53%
From Recruitment to <b>Retention</b>	62%	55%	50%	53%
Which Schools Are <b>Beating the Enrollment Odds?</b>	54%	47%	50%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	0%	67%	17%	76%
Are You Focused on <b>the Right Competitors?</b>	46%	24%	46%	29%
Zero-Sum or Win-Win?	0%	20%	33%	24%
The Merger Effect	0%	8%	2%	18%

# Comparing Results for Small/Regional Schools



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Topics Listed from Highest to Lowest Overall Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

	Large Priv. (13)	Small Priv. (49)	Large/Flag Pub. (48)	Small/Reg Pub. (17)
The Many Faces of <b>College ROI</b>	92%	59%	67%	100%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	85%	67%	77%	53%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	69%	55%	69%	59%
How Do You Compete in an <b>Oversaturated Market?</b>	69%	59%	56%	53%
From Recruitment to <b>Retention</b>	62%	55%	50%	53%
Which Schools Are <b>Beating the Enrollment Odds?</b>	54%	47%	50%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	0%	67%	17%	76%
Are You Focused on <b>the Right Competitors?</b>	46%	24%	46%	29%
Zero-Sum or Win-Win?	0%	20%	33%	24%
The Merger Effect	0%	8%	2%	18%

# Topics with Broad Agreement

Topics Listed from Highest to Lowest Overall Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

	Large Priv. (13)	Small Priv. (49)	Large/Flag Pub. (48)	Small/Reg Pub. (17)
The Many Faces of <b>College ROI</b>	92%	59%	67%	100%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	85%	67%	77%	53%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	69%	55%	69%	59%
How Do You Compete in an <b>Oversaturated Market?</b>	69%	59%	56%	53%
From Recruitment to <b>Retention</b>	62%	55%	50%	53%
Which Schools Are <b>Beating the Enrollment Odds?</b>	54%	47%	50%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	0%	67%	17%	76%
Are You Focused on <b>the Right Competitors?</b>	46%	24%	46%	29%
Zero-Sum or Win-Win?	0%	20%	33%	24%
The Merger Effect	0%	8%	2%	18%



# Topics with Varied Levels of Agreement

Topics Listed from Highest to Lowest Overall Score

**“Which 5 topics best address the most pressing issues facing your institution?”**

	Large Priv. (13)	Small Priv. (49)	Large/Flag Pub. (48)	Small/Reg Pub. (17)
The Many Faces of <b>College ROI</b>	92%	59%	67%	100%
Which <b>College Affordability Initiatives</b> Actually Drive Enrollment?	85%	67%	77%	53%
<b>Deconstructing the Demographic Crisis</b> (Cliff) in Higher Ed Enrollment	69%	55%	69%	59%
How Do You Compete in an <b>Oversaturated Market?</b>	69%	59%	56%	53%
From Recruitment to <b>Retention</b>	62%	55%	50%	53%
Which Schools Are <b>Beating the Enrollment Odds?</b>	54%	47%	50%	47%
What Fuels <b>Small College Enrollment Success</b> Today?	0%	67%	17%	76%
Are You Focused on <b>the Right Competitors?</b>	46%	24%	46%	29%
Zero-Sum or Win-Win?	0%	20%	33%	24%
The Merger Effect	0%	8%	2%	18%

# Planned Research for the Coming Year



## **Affordability and ROI**

Communicating the Value of Higher Education and Examining the Impact of Affordability Initiatives



## **Competition in a Saturated Market**

Using Institutional Personas to Identify What Sets You Apart and Where You Can Grow Recruitment



## **TBD Topic**

As trends develop in the coming months, we will assess the list and research at least one additional topic

# How These Results Inform Our Work

## Responding to the Needs of Enrollment Leaders

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### INSIGHT PAPER

## College Search Trends Across Space and Time: 2024 Edition

A Deep Dive into Inquiry, Application

### 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<sup>1</sup> 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 as Florida and Texas in the South.

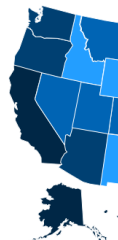
Very few states had an average of less than 500 miles that students considered traveling to go there.

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.

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

Median Distance Inquired<sup>2</sup> 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, these students are considered to be from the state they inquired to.

### The Latest Class's Search Reverted to an Earlier Timeline

#### Inquiry Activity Happened Earlier 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 SAS's audience platforms showed that search timelines were, in fact, moving later and later after the outset of the pandemic.<sup>3,4,5</sup> 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.

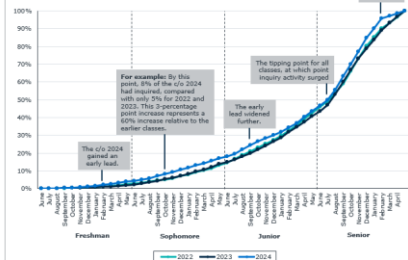
#### The Start of an Earlier Search

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 earlier than their predecessors. This suggests a non-trivial reversal of the previous trend of increasingly later searches, which we will continue to track.

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#### 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. SAS College Search Trends 2023.  
2. SAS Cumulative Inquiry Platform Survey 2023.  
3. SAS College Search Trends 2023.

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Source: SAS research and analysis.  
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See the latest update on this research at our upcoming Virtual Executive Summit

## 2025 Virtual Briefing for Enrollment Leaders

Join us in person for a **free virtual executive summit** on capturing student attention in the new enrollment landscape.

- Enrollment State of the Union 2025: Trends and Challenges in Enrollment Marketing
- Effective Tactics for Cutting Through the Noise to Appeal to Today's Students
- How our Partners are Finding Success in Today's Recruitment Market



**Limited Seats Available. Save Your Seat Today!**



**Join Us**

Date and Time:

**September 8, 1 p.m.-2:30 p.m.**

# How We Serve Our Partners



## The Enroll360 Difference:

Higher Education's  
Largest Student Dataset



Insights and Campaigns  
Driven by Enterprise-Wide AI



A Team of Experts Ready to  
Help You Make the Right Calls

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