EAB

INSIGHT PAPER

The Great Opt-Out

Why More Students Are Forgoing College and What Enrollment Leaders Can Do About It

This page intentionally left blank

©2024 by EAB. All Rights Reserved.

Enroll360

Project Directors

Tom Cakuls
Brian Schueler

Contributing Consultants

Vashae Dixon
Ryan Gardner-Cook
Cameron Jessop
Paul-Anne Robb

Legal Caveat

EAB Global, Inc. ("EAB") has made efforts to verify the accuracy of the information it provides to partners. This report relies on data obtained from many sources, however, and EAB cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, neither EAB nor any of its affiliates (each, an "EAB Organization") is in the business of giving legal, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, partners should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given partner's situation. Partners are advised to consult with appropriate professionals concerning legal, tax, or accounting issues, before implementing any of these tactics. No EAB Organization or any of its respective officers, directors, employees, or agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by any EAB Organization, or any of their respective employees or agents, or sources or other third parties, (b) any recommendation by any EAB Organization, or (c) failure of partner and its employees and agents to abide by the terms set forth herein.

EAB is a registered trademark of EAB Global, Inc. in the United States and other countries. Partners are not permitted to use these trademarks, or any other trademark, product name, service name, trade name, and logo of any EAB Organization without prior written consent of EAB. Other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names, and logos or images of the same does not necessarily constitute (a) an endorsement by such company of an EAB Organization and its products and services, or (b) an endorsement of the company or its products or services by an EAB Organization. No EAB Organization is affiliated with any such company.

IMPORTANT: Please read the following.

EAB has prepared this report for the exclusive use of its partners. Each partner acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to EAB. By accepting delivery of this Report, each partner agrees to abide by the terms as stated herein, including the following:

1. All right, title, and interest in and to this Report is owned by an EAB Organization. Except as stated herein, no right, license, permission, or interest of any kind in this Report is intended to be given, transferred to, or acquired by a partner. Each partner is authorized to use this Report only to the extent expressly authorized herein.

2. Each partner shall not sell, license, republish, distribute, or post online or otherwise this Report, in part or in whole. Each partner shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.

3. Each partner may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each partner shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each partner may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.

4. Each partner shall not remove from this Report any confidential markings, copyright notices, and/or other similar indicia herein.

5. Each partner is responsible for any breach of its obligations as stated herein by any of its employees or agents.

6. If a partner is unwilling to abide by any of the foregoing obligations, then such partner shall promptly return this Report and all copies thereof to EAB.

Table of Contents

Executive summary 7

Part 1: Understanding the non-consumption phenomenon

What is a "non-consumer"? 11
A historic decline in college-going 12
Why are fewer students going to college? 16
Listening to non-consumers 20

Part 2: Tactics for addressing non-consumption

Section 1: Understand your non-consumers 27
Tactic 1: Institution-Specific Non-Consumer Personas

Section 2: Find potential (and actual) non-consumers to recruit 31
Tactic 2: Channel Portfolio Analysis
Tactic 3: 'Ambush' Marketing
Tactic 4: Lead Recycling

Section 3: Get the content of your communications right 37
Tactic 5: Two-Minute Affordability Tutorial
Tactic 6: Outcomes Marketing
Tactic 7: Higher-Ed Pitch Playbook
Tactic 8: Emotionally Amplified Marketing

©2024 by EAB. All Rights Reserved.

Section 4: Get the timing of your communications right 43
Tactic 9: Front-Loaded Affordability Communications
Tactic 10: Proactive Aid ‘Awarding’
Tactic 11: Late-Stage Application Marketing
Tactic 12: Rationalized Melt Communications

Section 5: Emphasize interpersonal influence 51
Tactic 13: Parent-First Recruitment Outreach
Tactic 14: Paid High School Counselor Partnerships
Tactic 15: Yield-Season Success Coaching

Section 6: Remove procedural hurdles that hold students back 57
Tactic 16: ‘Application-Less’ Admissions
Tactic 17: Direct Admission

Section 7: Make your school’s offering more appealing to non-consumers 61
Tactic 18: Consolidated Class Scheduling
Tactic 19: Preenrollment Gap-Year Programs

©2024 by EAB. All Rights Reserved.

This page intentionally left blank

©2024 by EAB. All Rights Reserved.

Executive Summary

The Report in 5 Conclusions

1

A persistent trend of decreased college-going

The percentage of America's high school graduates enrolling at four-year colleges and universities has been decreasing across the past decade, with an especially pronounced drop in 2020. While some data sources show tentative early signs of a reversal, it is too soon to say whether rates of college-going are returning to historical levels.

2

Multiple causes

At present, it is hard to say why non-consumption is increasing, and that may prove to be the case in the longer term as well; in all likelihood, it is due to a combination of factors interacting in complex ways, from student academic underpreparedness to negative media coverage of higher ed to growing financial pressures on families.

3

A concern at all income levels

While most non-consumers still come from less-affluent households, the phenomenon is affecting students at all income levels; in fact, some analyses suggest that the rate of non-consumption is growing most rapidly for students from families earning more than $100K per year, who account for around a third of all non-consumers.

4

No such thing as a typical non-consumer

Reasons for opting out of college vary considerably within and across student demographics, including considerations ranging from fear of student-loan debt to simply not liking school. Effective approaches to tackling non-consumption take these varying perspectives into account.

5

Temporary and tractable (at a price)

Only a minority of non-consumers have zero interest in college-going; they are, more often, looking to take some time off before returning to school or need extra help navigating college search and admissions processes. While solutions exist for these problems, the scale of their impact will depend on our willingness to invest greater resources in them.

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

This page intentionally left blank

©2024 by EAB. All Rights Reserved.

Understanding the non-consumption phenomenon

PART 1

©2024 by EAB. All Rights Reserved.

> I sometimes think of today's young people as 'Gen B.' Like Bartleby the scrivener, many of them just "would prefer not to," and it's hard to say why.

Vice President of Enrollment Management
A moderately selective, mid-size university in the Midwest

Source: EAB interviews.

©2024 by EAB. All Rights Reserved.

What Is a 'Non-Consumer'?

Some notes on terminology

This report uses the term "non-consumer" to refer to high school graduates who are not enrolled in college.

Note that the term can have different scope depending on the context in which it is used and the perspective of those using it, as described below.

Two points of view

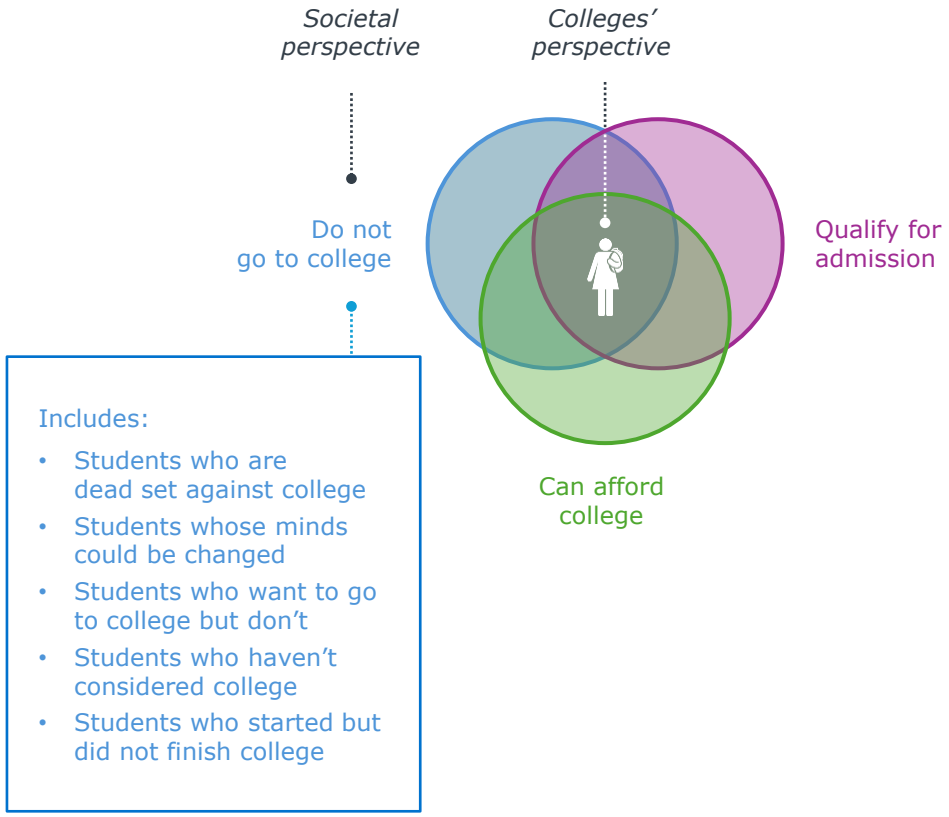
Discussions of non-consumption as a general phenomenon tend to treat any and all students who don't end up going to college as non-consumers, channeling the perspective of a society looking to maximize postsecondary attainment.

The relevant population for any given college or university, however, is often narrower, focusing on students who both qualify for admission and can pay for their education without assuming unmanageable amounts of debt.

This report will, for the most part, take the perspective of colleges and universities and, more specifically, their enrollment leaders.

Characteristics of Non-Consumers

Societal Perspective Versus Colleges' Perspective



Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

A Historic Decline in College-Going

Not a new phenomenon

While a drastic drop in college-going during the pandemic put a spotlight on non-consumption, the trend began years before.

Large, universal impact

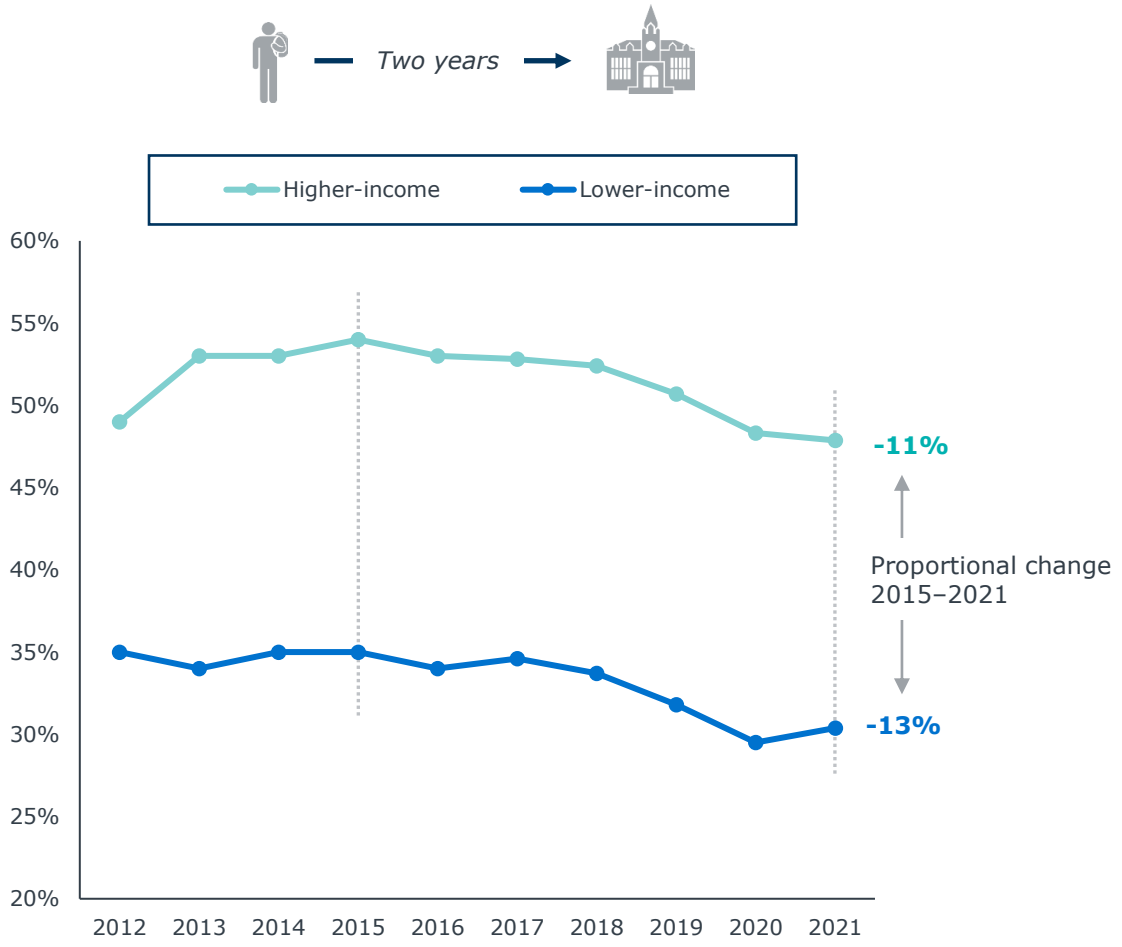
The decline in the proportion of students pursuing higher education can be seen most clearly when looking at data for the number of students enrolling within two years of high school graduation, as shown in the chart at right.

One notable aspect of the growth in non-consumption is that it is not limited to lower-income demographics. As shown at right, the trendline looks very similar for students graduating from high schools with higher income levels.

A key question we're unable to answer for the time being is whether college-going rates will remain at their currently depressed levels or whether we'll see them bounce back to where they were before they began their slide.

College-Going Rate, United States

Percentage of Students Enrolling at Four-Year Colleges or Universities Within Two Years of High School Graduation, by Income Level of High School Population



Source: EAB analysis of National Student Clearinghouse data.

©2024 by EAB. All Rights Reserved.

A Tentative Turn

Focusing on the first fall

By way of a complement to the data on the facing page, the chart at right shows the change in the college-going rate for students who enroll directly after graduating from high school.

A more up-to-date view

One advantage of this data is that it gives us a more detailed and focused picture of non-consumption, zeroing in, as it does, on one year's enrollment outcomes at a time.

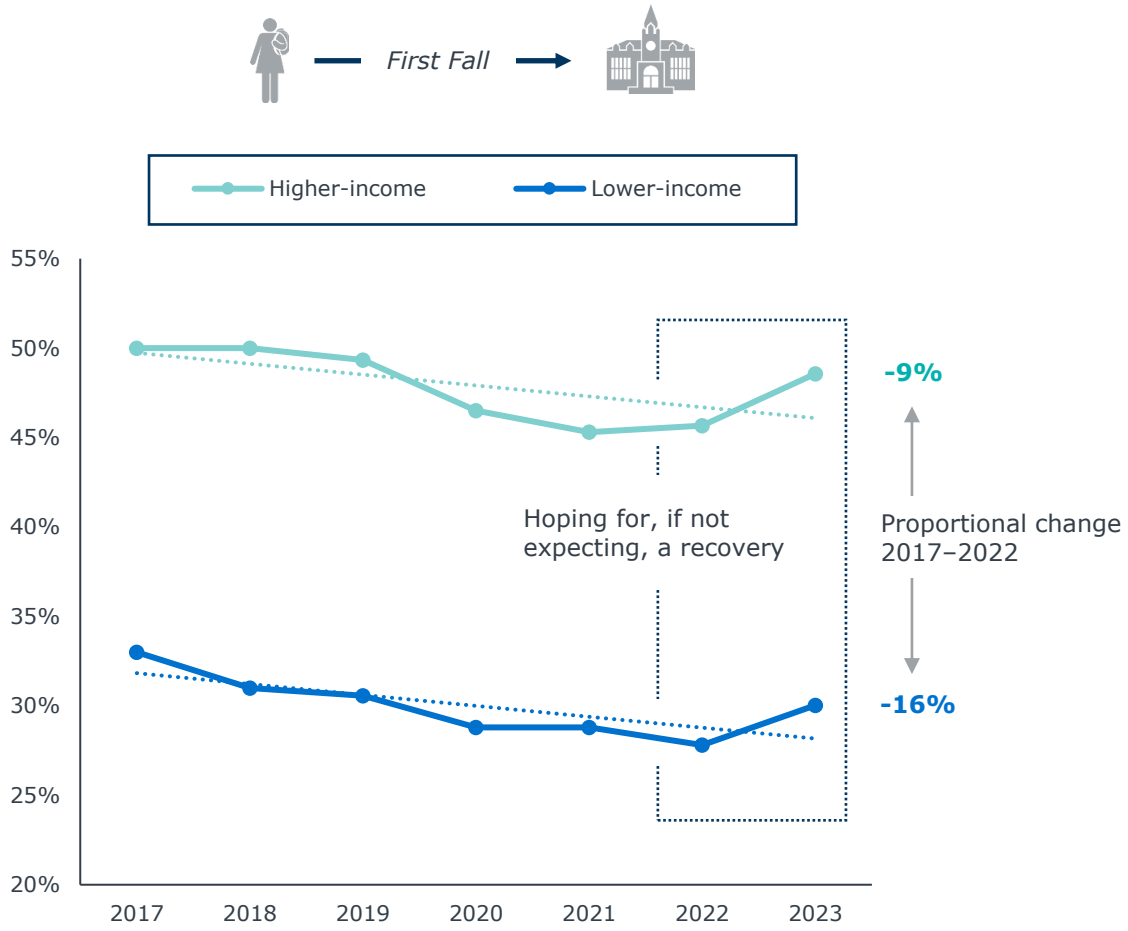
Another advantage is that it enables us to extend the non-consumption trendline closer to the present.

Many have commented on the fact that the college-going rate rose sharply in 2023, with optimistic observers wondering if we're seeing the start of a recovery.

The only thing that's certain is that it's too soon to say. The trendlines do, however, suggest that any recovery is unlikely to be swift, as does anecdotal evidence from the field. For example, 47% of high school counselors surveyed by EAB in 2024 said they have seen a drop in the proportion of students planning to go to college.

College-Going Rate, United States

Percentage of Students Enrolling at Four-Year Colleges or Universities Directly After Graduating from High School, by Income Level of High School Population



Source: EAB analysis of National Student Clearinghouse data.

©2024 by EAB. All Rights Reserved.

A Growing Phenomenon Among Higher-Income Demographics

A different perspective

As noted earlier, one important insight regarding the recent rise in non-consumption is that it is affecting both affluent students and their less well-to-do peers.

Not noted earlier is the fact that non-consumption appears to be growing much more rapidly among wealthier students.

This is illustrated most clearly by analyses that include students enrolling at any college, including two-year institutions, as in the chart at right (and in contrast to data on the preceding pages).

Afflicting the affluent

While students from lower-income households still account for the majority of non-consumers, non-consumption either increased only modestly or decreased for this group between 2012 and 2021.

By contrast, the number of non-consumers from families earning more than $100K annually grew by between 38% and 133% across the same time period.

Number of Non-Consumers, by Household Income, United States

High School Graduates Aged 19 to 20 Not Enrolled at Any College

Household income	Number of non-consumers		Change, 2012–2021
	2012	2021	
> $300K	18,216	42,426	+133%
$150K to 300K	123,420	256,020	+107%
$100K to $150K	253,522	349,289	+38%
$50K to $100K	513,586	516,902	+1%
< $50K	573,248	558,550	-3%

Non-consumption is growing most quickly among students from households earning more than $100K annually—a group that accounts for more than a third of all nonconsumers.

Sources: EAB analysis of American Community Survey (ACS) data; EAB research and analysis.

©2024 by EAB. All Rights Reserved.

> For far too long, our nation has encouraged only one path to success: a four-year college degree. Our nation needs to recognize the value of other paths, additional paths, such as apprenticeships and technical programs.

Kamala Harris

Source: Julia Mueller, "Harris pledges to rein in degree requirements for federal jobs," The Hill.

©2024 by EAB. All Rights Reserved.

Why Are Fewer Students Going to College?

An Ecosystem of Interrelated Factors

Nobody knows for sure why more students are opting out of higher education, and, given the complexity of the problem, definite answers are likely to remain elusive. That said, informed speculation is a helpful and necessary part of our search for solutions and can provide us with a basis for action. The material below and on the facing page outlines eight factors contributing, to varying degrees, to the non-consumption phenomenon. The length of the list reflects the demographic variety of non-consumers, the fast-changing nature of today's higher education markets, and profound recent changes in the broader American cultural landscape.

Eight Factors Driving Non-Consumption

Pandemic effects

Beyond leaving students less academically prepared—and making them accordingly apprehensive about college—the hastily implemented and often inadequate remote-learning approaches of the pandemic era appear to have soured some students on formal education more generally.

Perception of poor ROI

In addition to the many students who believe they can't afford college, there is an increasingly large group who don't believe it is worth the cost—60% of students surveyed are of this opinion.[1] Unhelpfully, evidence that they are, in some cases, correct, is getting easier to find, via sources such as the College Scorecard.

A hot job market

Many high school graduates who don't enroll in college end up working instead. While some do so out of necessity, i.e., they cannot afford not to work, high wages due to labor shortages have tempted other students directly into the workforce as well.

Growing draw of college alternatives

New non-college market entrants offering inexpensive and quickly attainable credentials and employers' increasing recognition of them are convincing some students that college is not the best route to well-paid work. Interest in established alternatives to college-going, such as apprenticeships, has also grown tremendously.

1) 2023 WSJ/NORC survey.

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

A cultural turn against higher ed

Multiple cultural factors—social-media algorithms amplifying negative messaging on higher education, growing anti-elitist populism, a conservative backlash against "woke-ism" on college campuses, and get-rich-quick influencer culture—have led more students and families to question the value of higher education.

Degree resets

The buyer's market for labor that emerged after the 2008 recession allowed employers to require degrees for roles for that didn't previously need one. Current market forces appear to be undoing that trend, with some employers removing such requirements—a phenomenon known as a "degree reset."

The smartphone epidemic

There is growing evidence that smartphone and social-media dependency among students is impairing their cognitive development, socialization, and mental health, rendering them less academically prepared and less able to persist in the face of impediments to college-going.

A growing leisure class

Outsized growth in the number of American households in the highest income brackets has resulted in a larger group of young people who feel less financial pressure to get a college degree and/or are in a position to fund gap-year experiences, passion projects, and other nonacademic pursuits.

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Families Increasingly Questioning the Value of a Degree

Value is a pivotal issue

Doubts regarding the value of college loom large among non-consumers' reasons for avoiding postsecondary education. In the spirit of better understanding this key driver of non-consumption, the material at right offers some additional context on how the nation's views of it are changing.

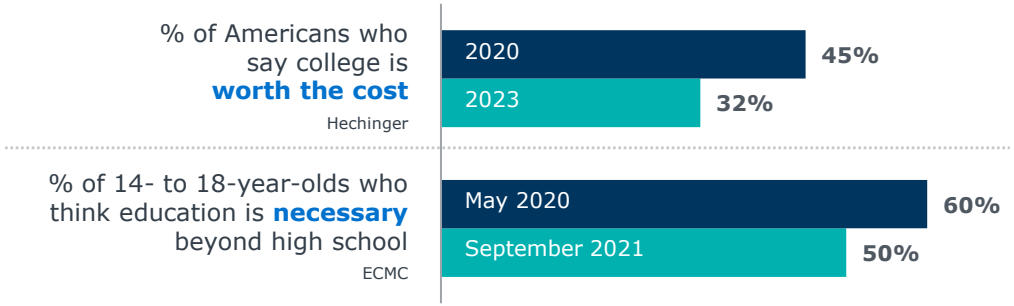
A growing image problem

One striking aspect of public opinion on college-going is how quickly it is deteriorating.

As shown in the upper set of charts at right, the brief period since 2020 has seen large and sudden drops in the percentage of Americans with positive views regarding the value of postsecondary education.

As you might expect, negative views of college are especially prevalent among non-consumers—a fact illustrated by the chart at the bottom of the page.

Higher Ed's Rapidly Deteriorating Brand



"A four-year college education **is not worth the cost** because people often graduate without specific job skills and with a large amount of debt to pay off."

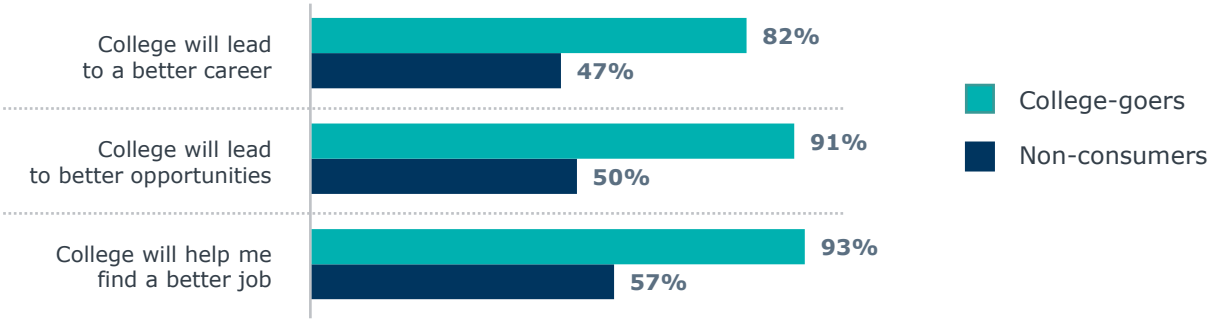
>60%

of 18- to 34-year-olds agree with this statement

Skepticism Is Especially Prevalent Among Non-Consumers

Percentage of Survey Respondents Who Agreed with the Following Statements:

EAB Survey of Non-Consumers



Sources: "How Higher Education Lost Its Shine," The Hechinger Report; "Question the Quo," ECMC Group; 2023 Wall Street Journal/NORC poll; "Republicans increasingly critical of several major U.S. institutions, including big corporations and banks," Pew Research Center; "Economic Well-Being of U.S. Households in 2021," Board of Governors of the Federal Reserve System; "Regret, Confusion and Lack of Confidence: Cengage Group's 2022 Graduate Employability Report Exposes the Reality of Entering Today's Workforce," Cengage Group.

©2024 by EAB. All Rights Reserved.

A Generation of Parents Keenly Attuned to College Debt

Naysayers in the home

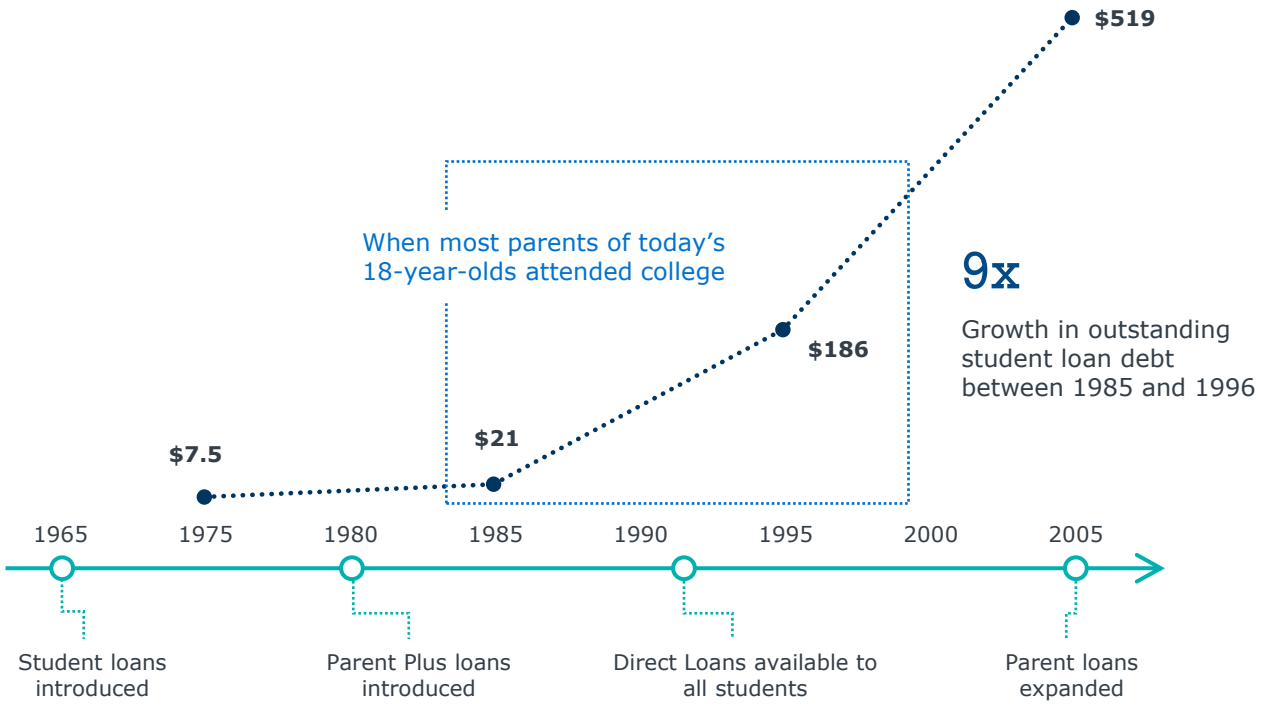
One factor making it more difficult to convince today's high schoolers to pursue postsecondary education is that their parents—for most students the single most influential party where college-related decisions are concerned—have a troubled relationship with student-loan debt.

Scarred by history

As illustrated in the chart at right, many parents of today's potential college-goers were college students themselves at a time when the nation saw a historic increase in student-loan debt. In the intervening years, many have undoubtedly watched their peers struggle with outsized student-debt loads and/or faced this misfortune themselves.

This may help explain the remarkable fact, surfaced in EAB surveys, that more than half of today's parents consider an "affordable" education to be one that does not require a student to assume any debt at all.

Total Outstanding Student-Loan Debt (Billions)[1] and Key Policy Milestones



"Student-loan debt is now threatening millions of people's ability to meet their basic needs in old age."

Abby Shafroth
Co-Director of Advocacy, National Consumer Law Center

1) Adjusted for inflation (2021 dollars).

Sources: EAB analysis of IPEDS data; EAB's 2024 Parent Survey; Jessica Blake, "Impact of Student Debt on Older Adults Grows," Inside Higher Ed.

©2024 by EAB. All Rights Reserved.

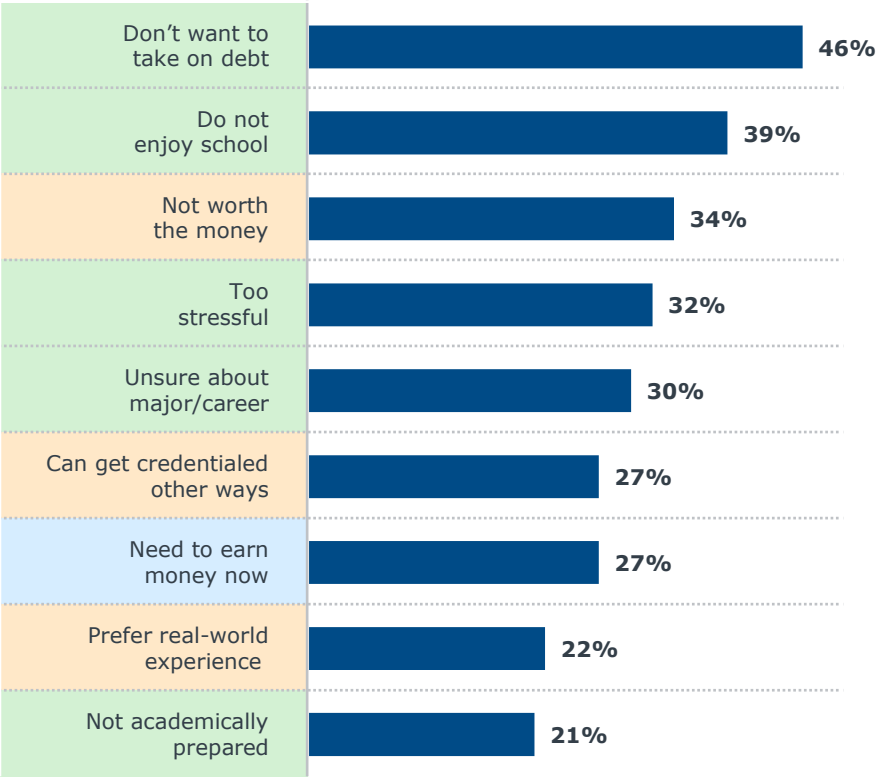
Listening to Non-Consumers

Survey Data Offers Valuable Insight into Causes of Reduced College-Going

Of all the available evidence on non-consumption, survey research gives us the most direct read on why more students are opting out of college. This and the facing page present data from two such surveys, each of which includes unique insights into the mindsets of non-consumers. As shown, students report a wide range of reasons for opting out, including financial considerations, doubts about the value of higher education, and competing obligations. One perhaps underappreciated aspect of these students' thinking is the degree to which it is guided by considerations that are not, strictly speaking, practical or utilitarian—their desire for time off, for example, or the fact that they simply don't like school.

Reasons High School Students Offer for Not Going to College

Reasons Cited by 20% or More of Survey Respondents, Includes Only Those Who Said They Might Not Pursue Higher Education



Skepticism on value

Financial constraints

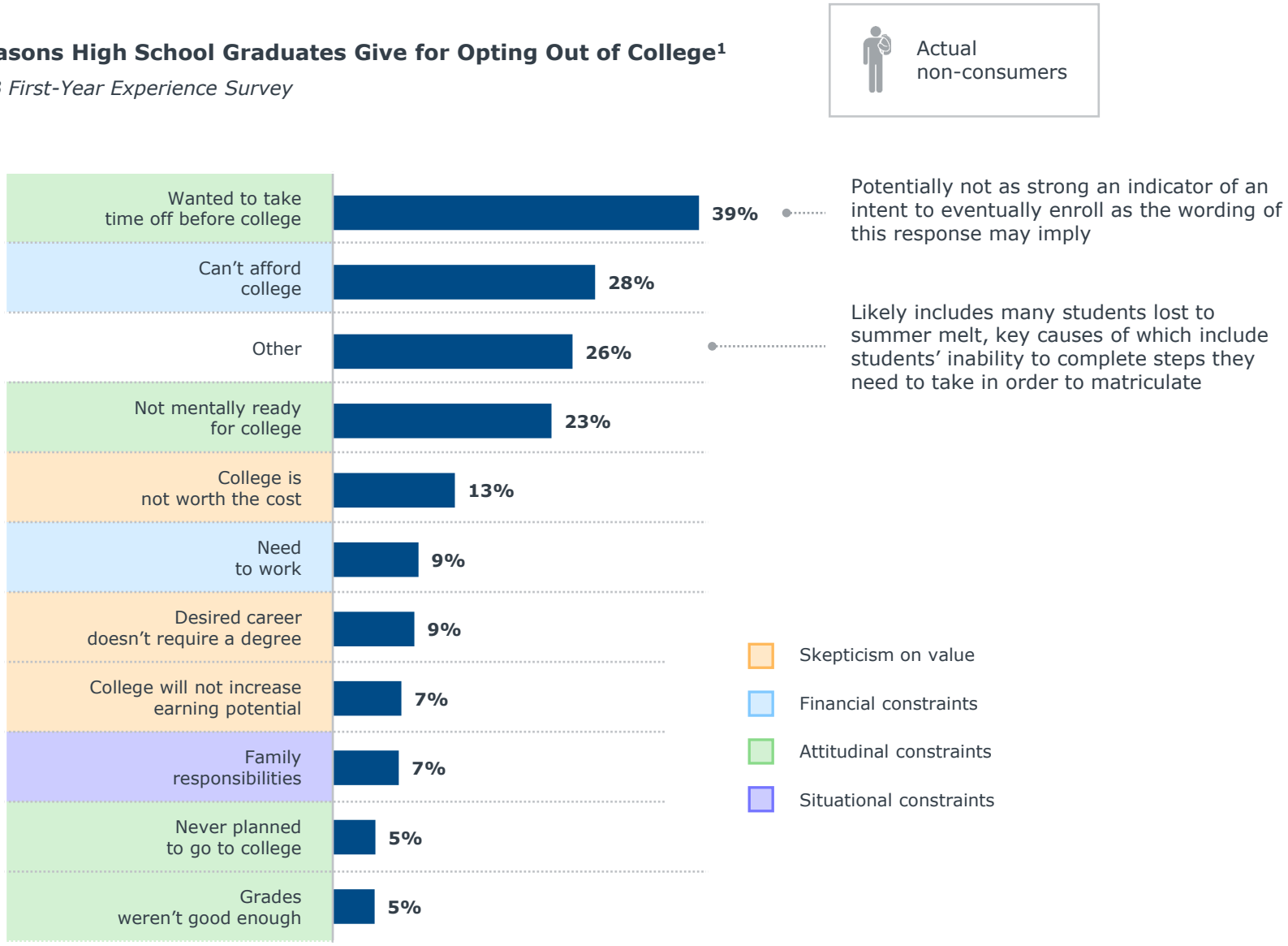
Attitudinal constraints

Source: Edge Research and HCM Strategists, "Exploring the Exodus from Higher Education," March 2024.

©2024 by EAB. All Rights Reserved.

Reasons High School Graduates Give for Opting Out of College[1]

EAB First-Year Experience Survey



1) The question the survey asked was "Why did you decide not to enroll at a college or university? (Select all that apply.)"

Source: EAB's 2024 First-Year Experience Survey.

©2024 by EAB. All Rights Reserved.

Distinctive Gender-Based Profiles

Demographic differences

One key finding from surveys of non-consumers is the degree to which reasons for non-consumption differ across various demographic segments. Illustrated on this page is one example—variation by gender.

Men are more ready, less willing

While men and women opt out of college at similar rates (12% and 10% respectively), they differ when it comes to their reasons.

Male non-consumers are, for example, less likely to report feeling unprepared for college but are more likely to question the value of a degree. They are also less likely to cite taking time off before college as a reason for opting out.

It is also worth noting the commonalities among men and women—for example, the fact that the top two reasons for opting out are the same for both (if we ignore the "other" category)—taking time off and not being able to afford college. Shared concerns such as these constitute a natural focus for your messaging to non-consumers.

Reasons Non-Consumers Give for Opting Out of College[1]

Reasons Cited by 20% or More of Poll Respondents, by Gender

	Women	Men
Wanted to take time off before college	42%	36%
Can't afford college	29%	26%
Not mentally ready for college	27%	19%
Other	24%	27%
College is not worth the cost	10%	15%
Need to work	9%	9%
Family responsibilities	8%	7%
Desired career doesn't require a degree	7%	11%
Grades weren't good enough	5%	4%
College will not increase earning potential	5%	10%
Never planned to go to college	4%	5%

Men are less likely to feel unprepared …

… but are more likely to question the value of college

1) The question survey participants were asked to respond to was ""Why did you decide not to enroll at a college or university? (Select all that apply.)"

Source: EAB's 2024 First-Year Experience Survey.

©2024 by EAB. All Rights Reserved.

Distinctive Income-Based Profiles

Filtering by affluence

Continuing the demographically segmented perspective of the preceding page, the material at right examines how reasons for non-consumption differ by family income.

Contrasting mindsets

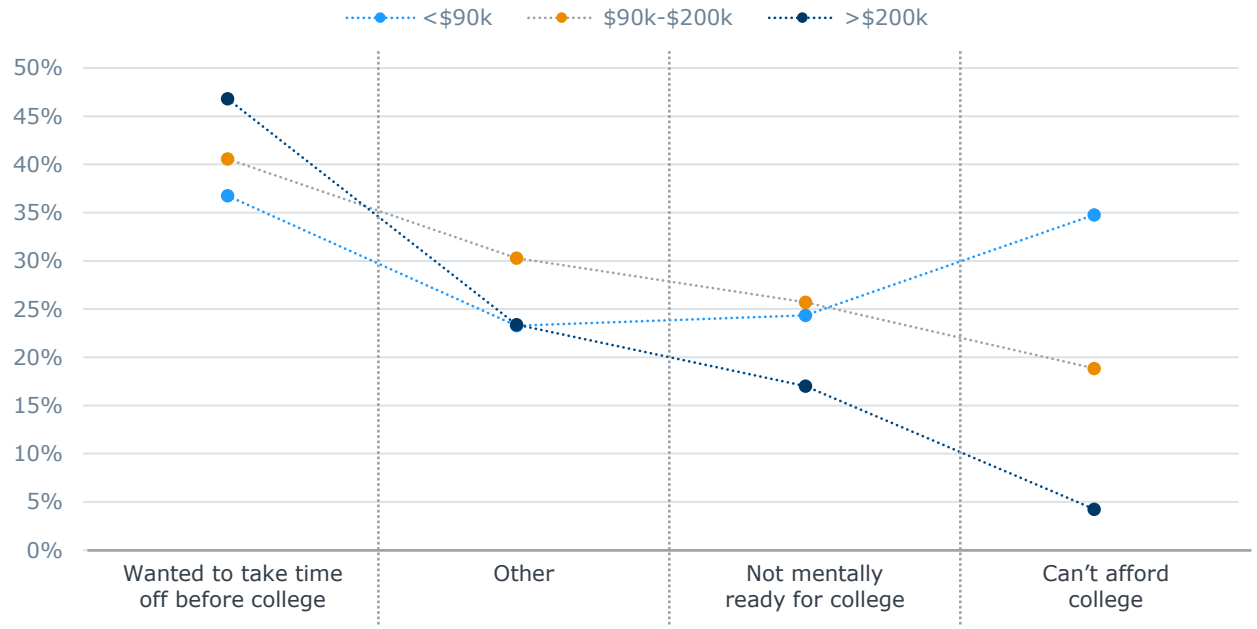
As can be seen in the chart at right, the most affluent students are considerably more likely to cite taking time off before college as a reason for opting out, are considerably less likely to offer lack of mental preparedness as a reason, and are more likely to think that the career they want does not require a degree.

The least affluent non-consumers are, unsurprisingly, far more likely to cite unaffordability as a reason for opting out.

Non-consumers from middle-income households stand out for being most likely to cite lack of mental readiness—and, perhaps relatedly, for choosing the "other" category, which may serve as a catch-all for other attitudinal constraints holding these students back.

Reasons Non-Consumers Give for Opting Out of College[1]

Reasons Cited by 20% or More of Poll Respondents, by Household Income



More-Affluent Students Are Less Likely to See Degrees as Necessary for Their Career Ambitions

"The career I am pursuing doesn't require a college degree"

Household income		
<$90K	$90K–$200K	>$200K
9%	12%	19%

1) The question survey participants were asked to respond to was ""Why did you decide not to enroll at a college or university? (Select all that apply.)"

Source: EAB's 2024 First-Year Experience Survey.

©2024 by EAB. All Rights Reserved.

A Note on 'Taking Time Off Before College'

Do they eventually enroll?

As shown on the preceding pages, the reason most often cited by students for not pursuing postsecondary education is their desire to take time off before enrolling.

One important consideration here is the likelihood of these students eventually making their way to college.

Demographic divergence

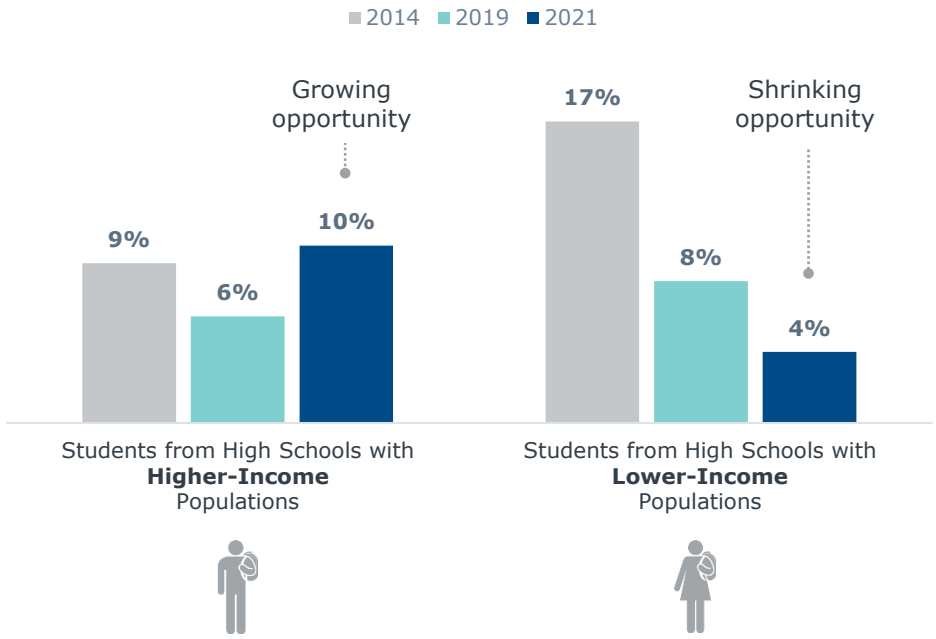
As shown in the chart at right, recent trends in delayed college-going paint a very different picture for more- and less-affluent students.

While the percentage of students enrolling after one or two years of high school graduation dropped for both groups between 2014 and 2019, they diverge by 2021. In that year, the number for more-affluent students exceeded its 2014 value, while the analogous figure for less-affluent students had dropped drastically.

It seems unlikely that the drops here are due to more students going straight to college after high school; the more plausible explanation is that they are either enrolling after two years or are not enrolling at all.

Mixed Opportunity on Late Enrollments

Percentage of Total College-Goers Enrolling in a Four-Year Institution a Year or Two After Graduating from High School[1]



Assessing Latent Potential

While recruitment of students who are one or two years out of college has not been a primary focus for many enrollment teams, increasing competitive pressures have led to growing interest in this population. The analysis above has implications for where you might choose to focus those efforts. While recent history suggests significant potential among lower-income students, given current market conditions, recruiting them will be more a case of swimming against the tide relative to the recruitment of more-affluent students.

Source: National Student Clearinghouse Research Center, "High School Benchmarks 2023."

1) Data shown is for public non-charter high schools.

©2024 by EAB. All Rights Reserved.

Tactics for addressing non-consumption

PART 2

©2024 by EAB. All Rights Reserved.

What Stops Students from Going to College?

Fleshing Out the Universe of Contributing Factors

This report includes several different takes on the causes of non-consumption, including analyses of the varying motivations of non-consumers as gleaned from student-survey data (see the preceding pages). This page offers a root-cause analysis, breaking the problem down into a hierarchy of mutually exclusive contributing factors that, taken together, account for the full range of drivers of non-consumption. The material below can serve as a framework for your own thinking about non-consumption as you search for solutions appropriate to the demographics you serve, the characteristics of your institution, and features of your local market.

A Root-Cause Analysis of Non-Consumption

Bolded items are ones most amenable to being addressed by admissions teams

Students who do not go to college

- Don't qualify for admission
- Qualify for admission
  - Know that they qualify
    - Uninterested/Uncommitted
      - "push" factors
        - **Scared of cost/debt**
        - **Unconvinced of value**
        - **Don't think they'd like college**
        - **Don't think they'd succeed**
      - "pull" factors
        - Work/entrepreneurship
        - Other training/development options
        - Leisure
        - Passion projects
    - Want to go to college
  - **Don't know that they qualify**
    - **Impeded by procedural hurdles**
    - **Dissuaded by parents or other influencers**
    - **Think they can't afford it**
    - Truly can't afford it
    - Want to delay start of college
    - Impeded by competing obligations

Includes students who are dead set against college and ones who are on the fence

Derailed by complicated search, application, financial aid, and other matriculation processes

For example, financially supporting their family

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Understand your non-consumers

SECTION 1

©2024 by EAB. All Rights Reserved.

Non-Consumers Present a Natural Use Case for Segmentation

Strategic disaggregation

As suggested on the preceding pages, non-consumers as a group comprise a great deal of variety in terms of demographics and motivations for opting out of college. For this reason, your approach to these populations will benefit from segmentation.

Deeper insight

The material at right shows one example of such an approach, based on a statistical analysis that identifies how the attitudes of non-consumers, as gleaned via survey research, tend to cluster.

As illustrated, the study from which this example is taken identified four major categories of non-consumers. (Note that the population studied included college non-completers.)

The deeper insight into non-consumer motivations that this kind of analysis unlocks can, in turn, inform your outreach to them, including whom you choose to focus on and the messages you choose to emphasize.

A Sample Segmentation Analysis[1]

Percentage of Non-Consumers Falling into Each of Four Segments Based on Psychographic Variables

1) Includes students who attended but did not complete college.

Sources: Adapted from Edge Research and HCM Strategists, "Exploring the Exodus from Higher Education"; EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Putting the 'Person' in 'Persona'

A local perspective

While aggregate analyses of nonconsumers based on data from large-scale surveys are indispensable for understanding the non-consumption phenomenon, they are less helpful for defining your approach to the specific student populations you serve. Effective segmentation is, necessarily, local.

Making it real

Your approach should begin with a segmentation analysis of the sort shown on the preceding page—preferably using the kind of statistical approach mentioned there, but, if that is not possible, then based on more informal assessments of your non-consumers.

A helpful next step is to flesh out the major categories of non-consumers you have identified, as shown at right. Giving your prospective students the kind of biographical detail and psychological color described at right can help you better imagine what types of outreach might resonate best with them.

Building Backstories Around Your Personas Helps You Better Imagine Ways of Engaging Non-Consumers

Emily, your hypothetical non-consumer

Emily's backstory, demographics, and psychographics
Her family and household context, her upbringing, and her current personal situation

Emily's needs
Practical, tangible things that Emily wants to accomplish, at higher quality, faster, or cheaper

Emily's gains
The positive emotions and social benefits Emily will enjoy as a result of achieving her goals

Emily's pains
Frustrations, fears, risks, obstacles, or bad outcomes experienced before or while pursuing her goals

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

This page intentionally left blank

©2024 by EAB. All Rights Reserved.

Find potential (and actual) non-consumers to recruit

SECTION 2

©2024 by EAB. All Rights Reserved.

Where Can Potential Non-Consumers Be Found?

Preempting non-consumption

With students becoming increasingly likely to opt out of college, the need to engage them before they make that fateful decision becomes more urgent. And the first step in doing so is finding them.

Because non-consumers are less likely to proactively seek you out, you'll need to do an exceptionally good job of recruitment lead-sourcing. That is the focus of this section.

Lead-gen fundamentals

At the root of effective lead generation is understanding the universe of sources available to you, the major categories of which are described at right.

Also crucial is the "philosophy" you apply to these sources. The most effective approaches seek out the full universe of students who fit your school's profile, not just the likeliest of prospects, and identify them as early as possible in their high school years.

An Overview of Major Audience-Source Types

Standardized testing

Lists from standardized tests such as the PSAT, SAT, and ACT form the core of most colleges' recruitment-marketing lead-generation efforts, due to the number of names available, the detail and accuracy of information provided, availability relatively early in students' college search, and the standardized measure of academic ability they provide.

Survey sources

These sources are based on survey data collected by organizations such as CBSS and NRCCUA. Because they are not tied to testing, they can sometimes provide broader and earlier coverage than test-based sources.

Online platforms

College-owned

This category includes the .edu and other college-owned digital channels, such as virtual campus tours.

Third-party

This category includes online college search hubs such as Appily and Naviance, as well as a large number of other sites and services that seek to attract and engage students, including social media.

Two Defining Features of Non-Consumer-Optimized Student Recruitment

Comprehensive	You aim to identify all students in your primary market who are a good fit with your school—not just those you are pretty sure will apply and enroll.
Early	You identify and engage prospects as early as possible in their high school career.

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Understanding the Complementary Contributions of Your Channels

Specific sources

Beyond understanding the broad categories of lead sources available to you, you'll need to determine which combination of them to use.

Multiple modes of action

One of the more challenging aspects of assembling an optimized portfolio of audience sources and conversion channels is that few, if any, contribute to your recruitment-marketing efforts in just one way; most advance several aims, and the trick lies in understanding each one's primary contribution relative to other channels.

For that reason, you'll want to undertake the analysis shown in the chart at right, examining how the sources and channels you use advance three specific recruitment-marketing aims.

While many of your sources may contribute to more than one aim, most also have a particular strength that will justify their presence in the mix.

Roles Played by Major Audience Sources and Conversion Channels

	Identifies students for you to recruit	Provides actionable insight on prospects	Moves students through the funnel
PSAT	✓✓✓	✓	-
NRCCUA	✓✓✓	✓	-
CBSS	✓✓✓	✓	-
SAT	✓	✓✓✓	-
ACT	✓	✓✓✓	-
.edu	✓	✓✓	✓✓✓
Virtual tour	✓	✓✓✓	✓✓✓
Source A			
Source B			
Source C			

E.g., college-search portals (such as Appily), online social communities for admitted students, CBOs

Rate sources based on their ability to deliver **new, incremental volume** over and above what's available from your core sources, e.g., PSAT, NRCCUA, CBSS

Actionable insights include students' level of interest in your institution and their academic ability

Distinguish channels that are purpose-built to move students from one funnel stage to the next

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Getting in Front of Passive Prospects

Off the beaten path

One reason finding potential non-consumers to recruit can be difficult is that they are less likely to take the kinds of actions that make them show up in your main audience sources, e.g., looking at your school's profile on a college-search website.

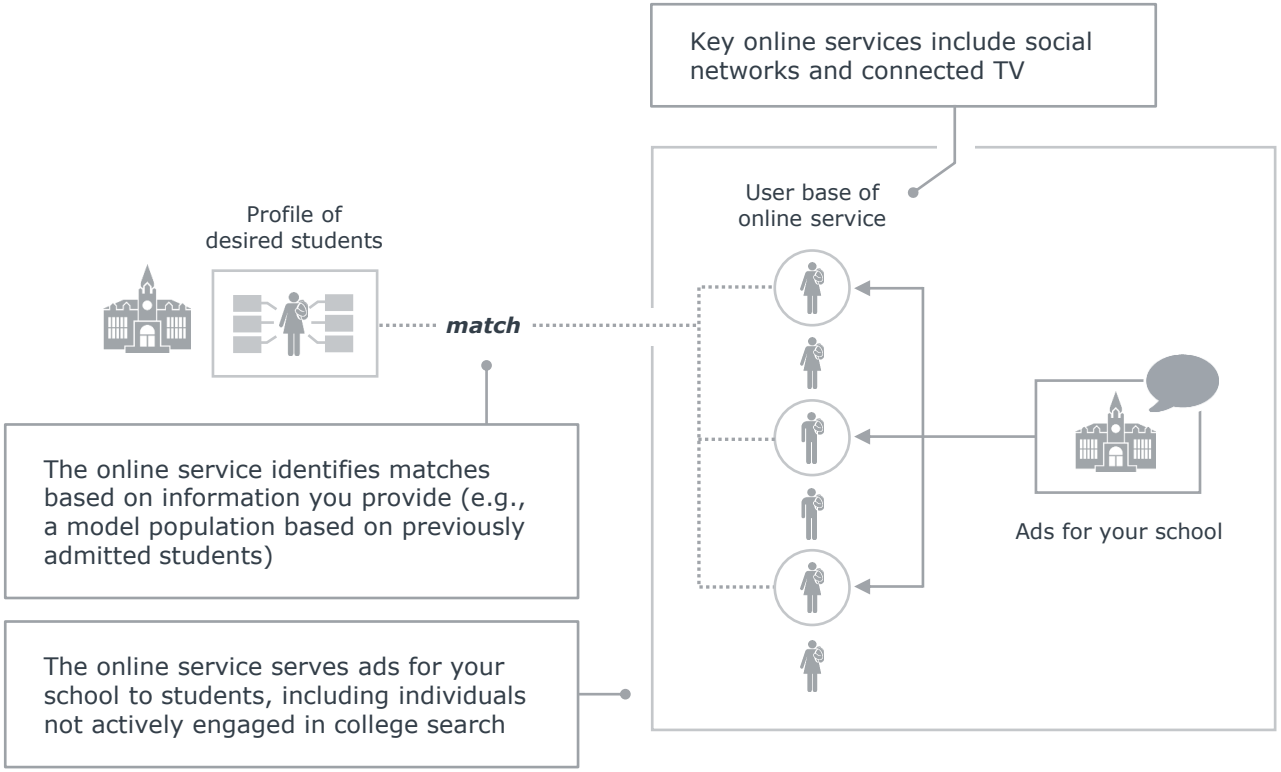
For this reason, approaches that locate prospects outside of the primary college-search ecosystem are especially important when it comes to non-consumers.

Several settings

One important option for getting in front of passive prospects is to serve them messages within the online platforms where they are most likely to be found.

This includes major social networks (TikTok, Instagram, etc.) as well as less widely appreciated channels such as connected TV (Roku, Apple TV, etc.). One notable feature of the latter category is the option it gives you to target audiences by IP address—a capability no longer provided natively by many social-media platforms.

Online Ads Can Help Start Conversations with Students Who Are Not Actively Engaged in College Search



Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Admitted Non-Consumers as Hot Leads

Promising prospects

Of all the non-consumers you might choose to recruit, the hottest leads are arguably those who applied to your institution and were admitted but did not end up enrolling at any college or university; they not only have shown that they are interested in pursuing postsecondary education but also have demonstrated interest in your institution specifically.

Furthermore, having already been through the college search process once, they are less likely to stumble on unfamiliar processes such as applying for financial aid.

Putting NSC data to work

The material at right shows a methodical approach to identifying and reengaging with the category of students just described, based on cross-referencing data from National Student Clearinghouse (NSC) Tracker Reports with a list of individuals who were admitted to your institution but did not enroll.

Use Your NSC Report to Identify Non-Consumers to Reengage with

National Student Clearinghouse®

A Four-Step Process

1	2	3	4
Identify	**Verify**	**Reach Out**	**Follow Up**
Identify admits who did not enroll	*Cross-reference with the NSC Tracker*	*Contact non-consumers*	*Follow up for 18 months*
	Get an NSC Tracker Report to identify students who didn't enroll in any college. Cross-reference this list with your application data.	Immediately reach out to the list of students with a call to action to enroll in the spring.	For the next 18 months, add the list of students to your traditional messaging campaign.

One School's Experience

A large, associate's-dominant four-year institution in the Midwest

Results from an 18-month Reengagement Campaign

3,500 Non-consumers identified → **400** Students enrolled

Sources: Community College Research Center, "What we know about Transfer," Teachers College, Columbia University, Jan. 2015; EAB interviews and analysis.

©2024 by EAB. All Rights Reserved.

This page intentionally left blank

©2024 by EAB. All Rights Reserved.

Get the content of your communications right

SECTION 3

©2024 by EAB. All Rights Reserved.

College Cost Is a Major Source of Anxiety and Confusion

An unavoidable topic

Given the prominent role that financial concerns play in non-consumption, you have no choice but to address related issues in your outreach to families.

A multifaceted concern

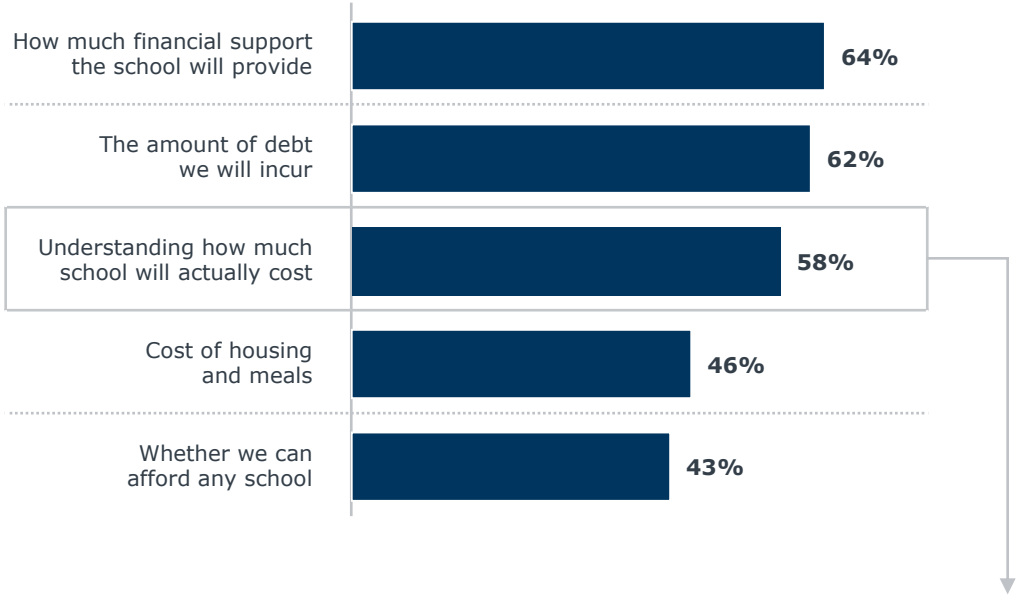
When you do, you'll want to ensure that you're addressing the various dimensions of the college-cost question that matter most to students and parents.

As the upper chart on this page indicates, parents' concern over college finances is many-sided, comprising such questions as the amount of financial support the school will provide, how much debt they will incur, and how much school will actually cost.

The bottom chart illustrates the need for education on these points, with specific reference to the third question just mentioned. More than a third of parents either focus on sticker price or are unsure which measure of college cost to consider when evaluating higher-education options—a fact that has obvious negative implications for their student's path to matriculation.

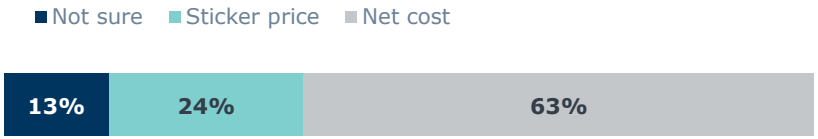
Parents' Top Five Concerns Regarding the Cost of College

Percentage of Surveyed Parents Indicating Concern over Specified Aspects of College Finances[1]



Many Parents Are Confused by College Pricing

Q: "When you think of the cost of college, what do you consider?"



1) Q: What concerns do you have about the cost of your student's education? Asked of parents who indicated concern about college costs or the amount of debt they may incur; n = 1,063.

Source: EAB's 2024 Parent Survey.

©2024 by EAB. All Rights Reserved.

An Affordability-Messaging Checklist

What to say about cost

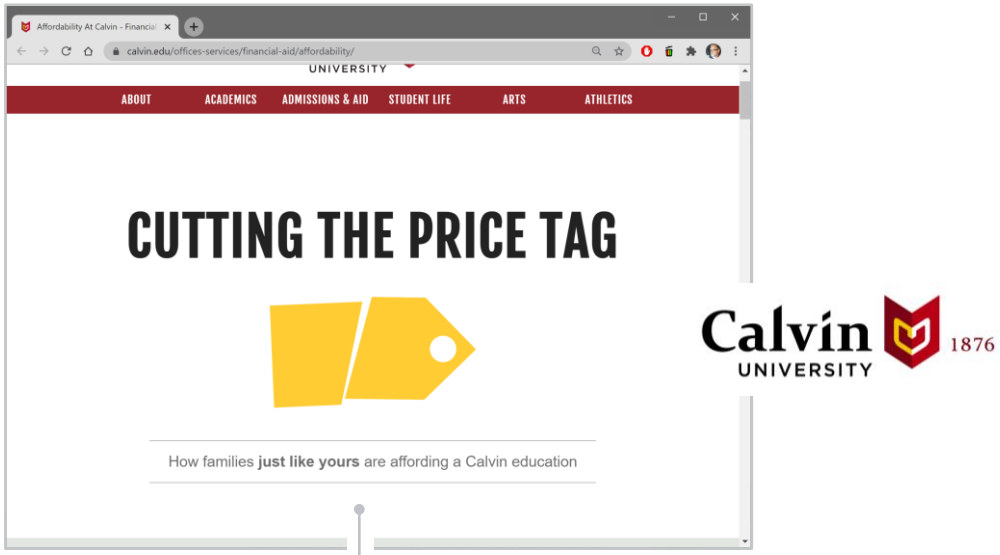
Effective communication with families about college finances depends on addressing what matters most to them and understanding the gaps in their knowledge. The example shown at right, a dedicated affordability-focused page on Calvin University's website, delivers on both counts.

A short list of key topics

There are various specific things this page gets right. One is contextualizing the cost of attendance by showing a distribution of Calvin students by family income. A second is explaining sticker price versus actual cost of attendance, a concept many families struggle with. A third is showing reassuring data regarding the very large percentage of Calvin graduates who successfully discharge their student-loan debt, defusing an issue that is a well-known concern for many families.

The page also emphasizes information on grant aid, which is known to carry disproportionate psychological weight with families.

Calvin University's Website Offers a Quick but Comprehensive Tutorial on College Finances



- ✓ Shows **distribution** of Calvin students by family income
- ✓ Compares Calvin's price to **national average** for four-year privates
- ✓ Explains sticker price versus **actual cost** of attendance
- ✓ Shows **average debt** at graduation for Calvin students who borrow
- ✓ Shows **negligible loan default** rate for Calvin graduates relative to national average

Sources: https://calvin.edu/offices-services/financial-aid/affordability/index.html; EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Proof of Value

Increasing transparency

One important consideration when it comes to convincing potential non-consumers of the value of college is that that question is never really a general one; it is always a matter of the value of a degree in a particular major from a particular school.

This fact has taken on new urgency given the U.S. Department of Education's plan to start publishing outcomes data for every academic program at every school starting in 2026, via its Financial Value Transparency (FVT) initiative.

A new kind of evidence

Colleges and universities that end up being top performers on FVT will be able to use that information as another means of proving their value to skeptical non-consumers. In the interim, schools can use data already available from the College Scorecard, as shown at right, to similar ends.

It remains to be seen what impact FVT reporting will have on underperforming schools and on the college-going rates of the kinds of students those institutions serve; some fear that it will be a disservice to them.

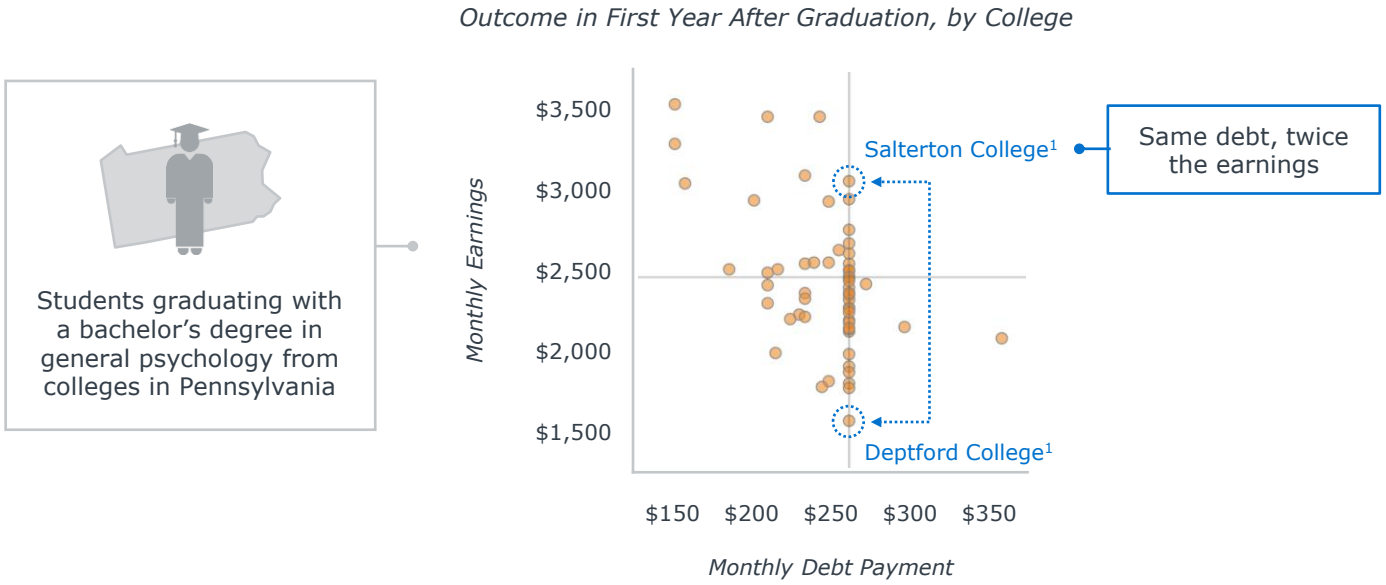
The U.S. Department of Education's Financial Value Transparency (FVT) Initiative

FVT Will Report Two Key Metrics on Every Academic Program at Every College and University

Debt-to-earnings ratio	Benchmark: Median annual debt payments must be no more than 8% of annual earnings or 20% of discretionary earnings
Earnings premium	Benchmark: At least half of program completers must have higher earnings than a typical high school graduate

FVT Likely to Reveal Striking Variations in Value

Extrapolating from Currently Available College Scorecard Data



Sources: U.S. Department of Education; Georgetown University Center on Education and the Workforce, "Buyer Beware"; EAB research and analysis.

1) Pseudonyms.

©2024 by EAB. All Rights Reserved.

Making a General Case for Postsecondary Education

Boosting the sector

One of the things that makes today's recruitment environment so challenging is that, in addition to pitching their own institutions—never a simple matter—admissions teams are having to also convince students that postsecondary education, per se, is worth pursuing.

It turns out there are better and worse ways of doing that.

Non-consumer-friendly themes

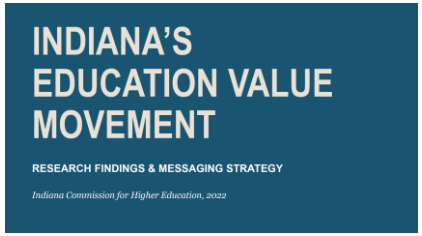
Shown at right are findings from a large-scale research initiative on non-consumption undertaken by the Indiana Commission for Higher Education, which included intensive interviews and focus groups with students, parents, and educators.

One key finding from this research concerns particular arguments we make with prospects in favor of college—for example, that degree holders earn more. While we are right in thinking that students need and value this kind of information, the Commission found that related discussions can be ineffective or even counterproductive if not supplemented by complementary messaging of the sort described in the table at right.

Three Core Themes for Engaging Potential Non-Consumers

From Indiana Education Value Movement Research

		Messaging strategy	*Sample scripting*
1	**Flexibility**	Describe the value of higher education in terms of opportunity and control	"Education will help open doors for you, and keep them open, providing you with flexibility and control, now and into the future"
2	**Feasibility**	Emphasize the availability of financial and other forms of support for students	"There are many resources available to help you get funding and navigate the financial aid and admissions processes"
3	**Choice**	Highlight different higher-ed options available to students	"You can choose from options like career certifications, trade school, a 2-year associate's degree, or 4-year bachelor's degree"



"We often present the facts as if we're entering a debate. This causes our audiences to shut down. Instead, we need to connect with them on an emotional level. **Think dinner party, not debate.**"

Indiana's Education Value Movement

Sources: Indiana's Education Value Movement: Research Findings and Messaging Strategy, 2022; EAB interviews and analysis.

©2024 by EAB. All Rights Reserved.

Give Prospects Something to Be Genuinely Excited About

Hearts and minds

While you'll definitely want to reassure potential non-consumers regarding the practical benefits of college-going, that—on its own—will not be enough. You'll also need to appeal to their emotions.

Messages that speak effectively to their interests, hopes, and desires have an irrefutability that quantitative evidence or arguments about outcomes cannot match.

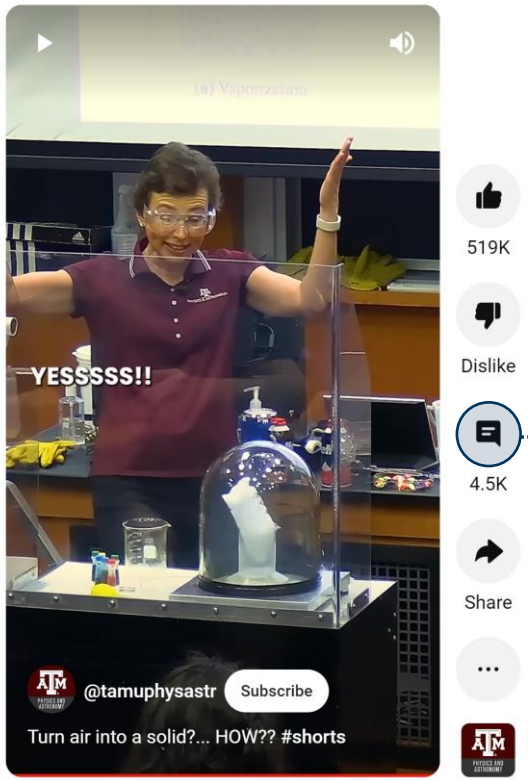
A new standard

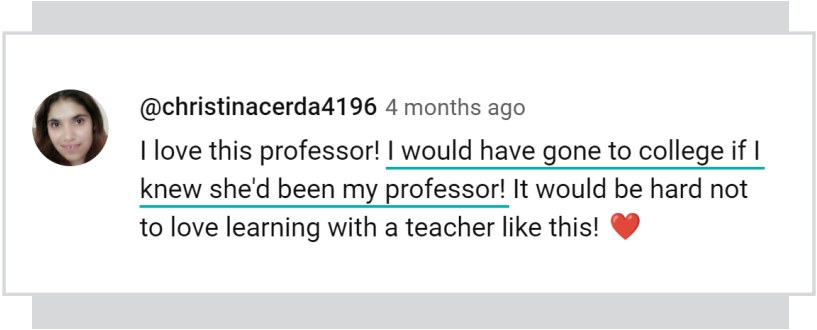
While all good marketing, including recruitment marketing, speaks to the emotions, with non-consumers you'll need to take that to a new level.

The YouTube video from Texas A&M referenced at right is a great example. Thanks to its fascinating content and highly engaging star, Professor Tatiana Erukhimova, it has gone viral, to the tune of 11 million views. Among its viewers was the student shown at right, whose attitude toward college-going was changed by the video.

Capturing Potential Non-Consumers' Imagination

Case in Point: Texas A&M Professor's Freezing Nitrogen Demonstration on YouTube





11M views

519K likes

Sources: YouTube short, "Turn air into a solid? HOW??"; Shern-Min Chow and Cory McCord, "Texas A&M physics professor is social media sensation with 500,000,000 YouTube views," KHOU website.

©2024 by EAB. All Rights Reserved.

Get the timing of your communications right

SECTION 4

©2024 by EAB. All Rights Reserved.

Cost Perceptions Increasingly Likely to Preempt College Conversations

A question of timing

While it's important to get the content of your communications with non-consumers right (see the preceding section), the timing of those communications is also important. The chart at right offers one reason why.

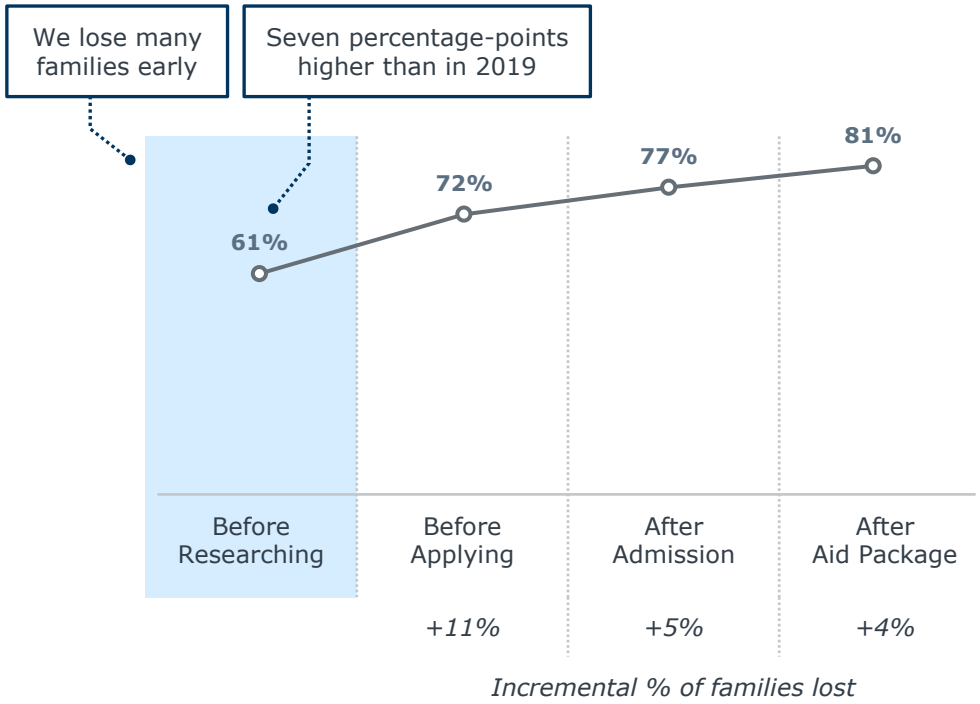
Early rejections

As shown, a full 61% of students and parents eliminate schools from consideration based on cost before they have even started researching schools.

If we assume that their research includes learning more about the net cost of attendance, these families are almost certainly eliminating from their consideration set schools that might be an excellent fit for them. Or, what is worse, their misconceptions about cost may be putting them off college entirely.

"Did you eliminate any schools based on cost?"

Cumulative % of Students and Parents Saying "Yes," by Stage of Recruitment Funnel



Sources: Sallie Mae, "How America Pays for College," 2019 and 2024 editions; EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Parents Are Open to Early Communications on College Finances

Seeking insight

While many families may be inclined to prematurely close off college options based on misconceptions about cost (see preceding page), the good news is that a large group of parents are open to early communications from colleges and universities about affordability.

As shown at right, more than a third of parents want information on financial topics in their student's freshman or sophomore year of high school. For households earning less than $150K a year, that number is upward of 40%.

A vehicle for value messaging

Related communications that you send to families represent an opportunity for you to also showcase your institution's value proposition, for example, by highlighting your most compelling academic offerings. (A large percentage of parents indicate an interest in receiving information about schools' academic programs in their students' freshman and sophomore years.)

Percentage of Parents Who Want Information from Colleges/Universities on Selected Financial Topics

By Student's High School Year

	Freshman	Sophomore	Junior	Senior
Costs	37%	47%	65%	52%
Financial support	34%	37%	56%	51%

>1/3

of parents want information on financial topics in their student's freshman and/or sophomore year

Lower-Income Households Especially Eager for Early Information

Percentage of Parents Who Want Information on Sources of Funding in Their Student's Sophomore Year, by Household Income

Sources: EAB 2024 Parent Survey; EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Proactive Communication of Aid Awards Moves the Dial on Enrollment

Focused on financial support

EAB polling has shown that the cost-related question that matters most to families is how much financial support schools will provide.

Just how big an impact you can have by getting that information in front of families is suggested by the study shown at right.

Up-front insight

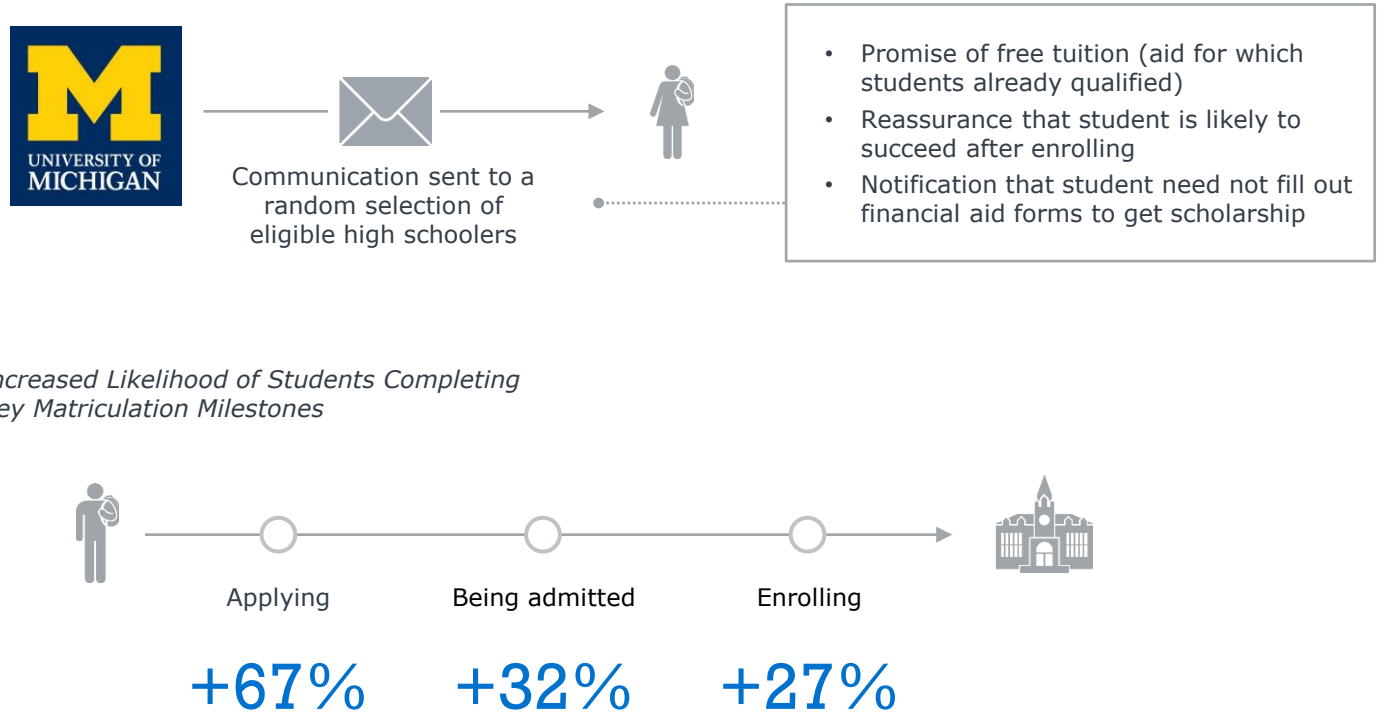
The University of Michigan sent students qualifying for free tuition notifications of that fact—in advance of them applying or filing a FAFSA, and whether or not they had shown any interest in or awareness of the institution.

As indicated, this approach led to large increases in the number of students applying, being admitted, and enrolling.

While this approach may not be generalizable to most students at most institutions—the scale at which it can be applied depends on an institution's ability to meet students' full financial need—a version of it, shown on the next page, does have broad applicability.

Impact of Proactive Notification of Aid Award

A Randomized Control Trial



Sources: Hallie Busta, "How U of Michigan used targeted outreach to recruit more low-income students," Higher Ed Dive, December 12, 2018; EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Preview the Financial Support You'll Offer Students

Piggybacking on admit offers

The past couple of years have seen a surge in the number of colleges and universities embracing direct-admission—the practice of extending admit offers to students in advance of them applying.

The most impactful implementations of direct admission include information on likely or actual aid-award amounts with their admit offers—an approach that can do much to preempt families' concerns over affordability and, consequently, reduce the odds of them forgoing college.

A range of options

The effectiveness of proactive aid communications depends, in part, on how specific and definite they are, as described in the table at right.

You might, for example, tell students the minimum amount of grant aid they can expect to receive, which is the easiest approach but also the least impactful option. Alternately, you might tell them the likely amount of their total aid award package (merit plus need-based aid), which is the most effective approach but also the hardest to pull off.

Several Ways Aid-Award Info Can Be Incorporated into Proactive Admit Offers

Least impactful ↑ ↓ Most impactful

No information on aid award		Few schools will choose to omit financial aid award estimates from their direct-admit offers. Given how spooked many students remain by institutions' sticker price, the stakes are simply too high to leave the matter unaddressed at this pivotal point in communication with prospective students.
Merit aid only	Minimum	If you base merit aid on students' HS GPA, and you are worried about that GPA potentially changing (e.g., after being normalized once a student's full academic record is received), you may want to frame the amount of merit aid you promise as a minimum they can expect to receive rather than an exact amount. This approach has the obvious drawback of understating the amount most students can expect to receive.
	Exact amount	If you base merit aid on students' HS GPA and are confident that the GPAs you have for them will not change significantly (see above), you can tell them exactly how much they will receive. This approach addresses the problem of understating aid awards associated with the "minimum" approach.
Total award package		Any school could, in theory, give students a fairly accurate estimate of their total aid award (and, therefore, net cost of attendance), including public grant money, based on analyses of student data from consumer databases and/or other sources—an approach some schools are actually using.

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Late Applicants Are an Underappreciated Source of Potential Enrollment

Delayed progress

The demographics at greatest risk of non-consumption also tend to be "late" on various key conversion points in the recruitment funnel, from initiating their college search to applying. This can cause schools that follow a conventional recruitment calendar to miss out on candidates they might otherwise be capturing.

Adapting the calendar

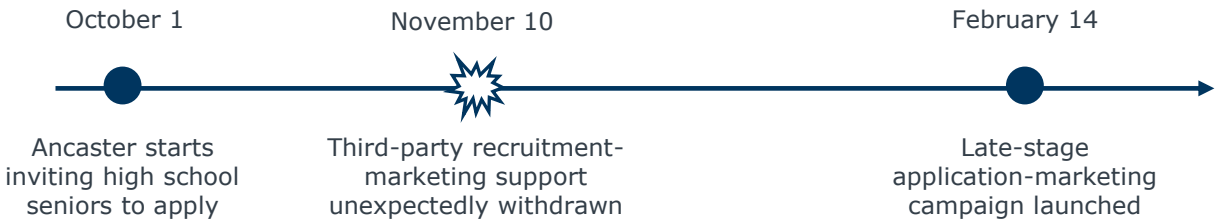
The good news is that adapting the timing of your recruitment activities can help address the problem.

The case study at right gives the example of late-stage application marketing—a practice whereby you continue outreach to potential applicants well past the point on the calendar where many admissions teams assume that students are done applying.

As shown, a full 25% of Ancaster University's enrollment in the year depicted came from applications it received after initiating a late-stage campaign on February 14.

A February Push for New Applications Delivers Results at Ancaster University[1]

A Recruitment-Marketing Debacle Spurs Innovation



Funnel Metrics, Before and After Late-Stage Application Marketing

	Before February 14	After February 14	*% of total from late campaign*
Applications	2,641	914	26%
Admits	2012	421	17%
Enrollments	345	114	25%

"It never occurred to us that students might be open to initiating new application discussions through the spring of their senior year. But they are. We've seen that first-hand. Even students that might not have had us on their radar at all."

VP of Enrollment

1) A pseudonym.

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Summer Melt Is a Major Component of Non-Consumption

A leaky pipeline

Among the various groups of potential non-consumers you might engage, students at risk of melt deserve special attention; by our estimate, they account for around a quarter of all non-consumption.

Lack of clear ownership

While many factors contribute to summer melt, an especially common and consequential one is unclear division of labor across the various university departments responsible for keeping students on track to matriculation—a state of affairs that can cause key tasks to go unidentified, unassigned, and uncompleted.

Making matters worse is the gap that often exists on the calendar between deposit and orientation—a time during which no department may be actively engaging with students.

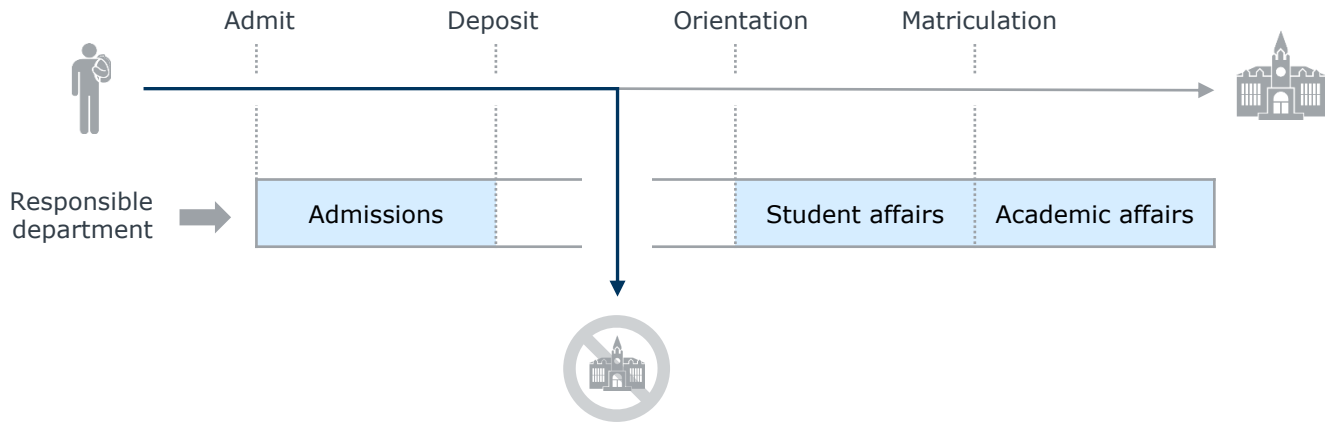
Summer Melt Drives Around a Quarter of Non-Consumption

~25%

of non-consumers applied and were accepted but did not enroll[1]

Falling Through the Cracks

Gap in Student Support Between Deposit and Orientation, Unclear Ownership of Melt-Prevention Cause Students to Drop off the Path to Matriculation



1) Estimated by applying HSLS proportions to estimates of HS graduates and estimates of college enrollment in 2020.

Sources: National Center for Education Statistics (NCES), High School Longitudinal Study of 2009, 2013 Update; EAB interviews and analysis.

©2024 by EAB. All Rights Reserved.

A Solution Based on Coordinated Communication

Key messages being lost

As mentioned on the preceding page, one important consequence of the lack of coordination between university departments is poor communication with admitted students.

When admissions, student affairs, and academic affairs teams do not have a detailed picture of each other's interactions with students, they can end up sending communications that are duplicative, contradictory, missing key information, or otherwise problematic.

A melt-comms playbook

This particular challenge can be effectively addressed through a methodical approach to team coordination and communication-flow design—undertakings for which EAB has developed the melt-specific toolkit shown at right.

Common Communication Pitfalls That Undermine Melt-Prevention Efforts

Messages that are too numerous and/or duplicative
Messages become white noise

Messages that are confusing
Messages contain inconsistent or contradictory information

Messages that are easy to miss
Communications use suboptimal channels, formats, and timing

EAB's Integrated-Prospect-Communication Toolkit

Toolkit Components

- Comprehensive communication audits
- Sample workshop logistics plans
- Communication-plan rules of thumb
- Implementation guidance
- Persona-development tools

This toolkit helps enrollment leaders create and deliver a positive enrollment experience by coordinating communications across their institution.

Access the toolkit on demand at EAB.com.

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Emphasize interpersonal influence

SECTION 5

©2024 by EAB. All Rights Reserved.

Getting to Potential Non-Consumers Through Their Parents

Growing reliance on parents

Many potential non-consumers come from demographic segments that EAB research has found to be especially reliant on other people for learning about college (as opposed to doing their own independent research via self-serve channels).

As shown in the chart at right, the most important individuals filling that role are, by a wide margin, parents. And their importance is only increasing; in EAB surveys, students citing parents as an important source of information increased from 34% to 48% between 2019 and 2022 alone.

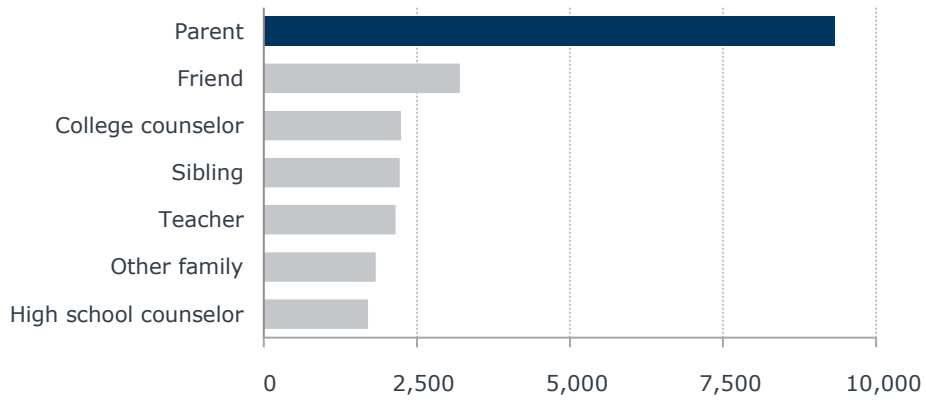
Effective allies

Because of the potentially critical role that parents can play in convincing their students to pursue higher education, they should be considered a key audience segment in your recruitment-marketing outreach. Control tests such as the one illustrated at right have shown that outreach of this sort can meaningfully move the dial on enrollment.

Parents Influence Students

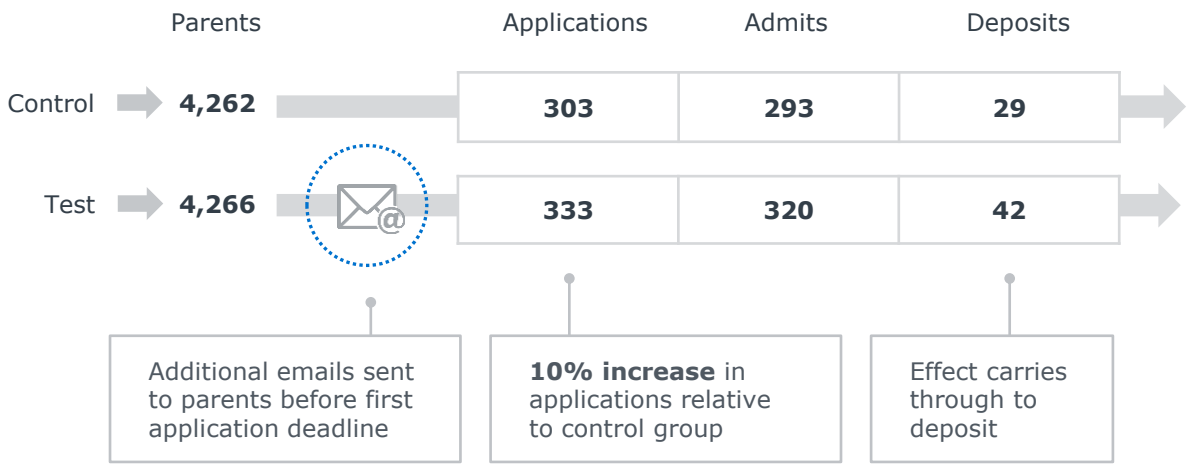
Number of Surveyed Students Identifying Individuals as "Highly Influential" in Their College Search

EAB Survey Research



You Can Influence Parents

Randomized EAB Testing Shows That Engaging Parents Boosts Enrollment



Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

A Direct Route to Your Most Powerful Ally

Ask and ye shall receive

One key step in engaging parents is getting their contact details.

Admissions teams can and should solicit that information from prospective students; around 80% of search responders engaged via well-executed recruitment-marketing campaigns share parent contact info when asked. And, crucially, those who do are 20% more likely to enroll.

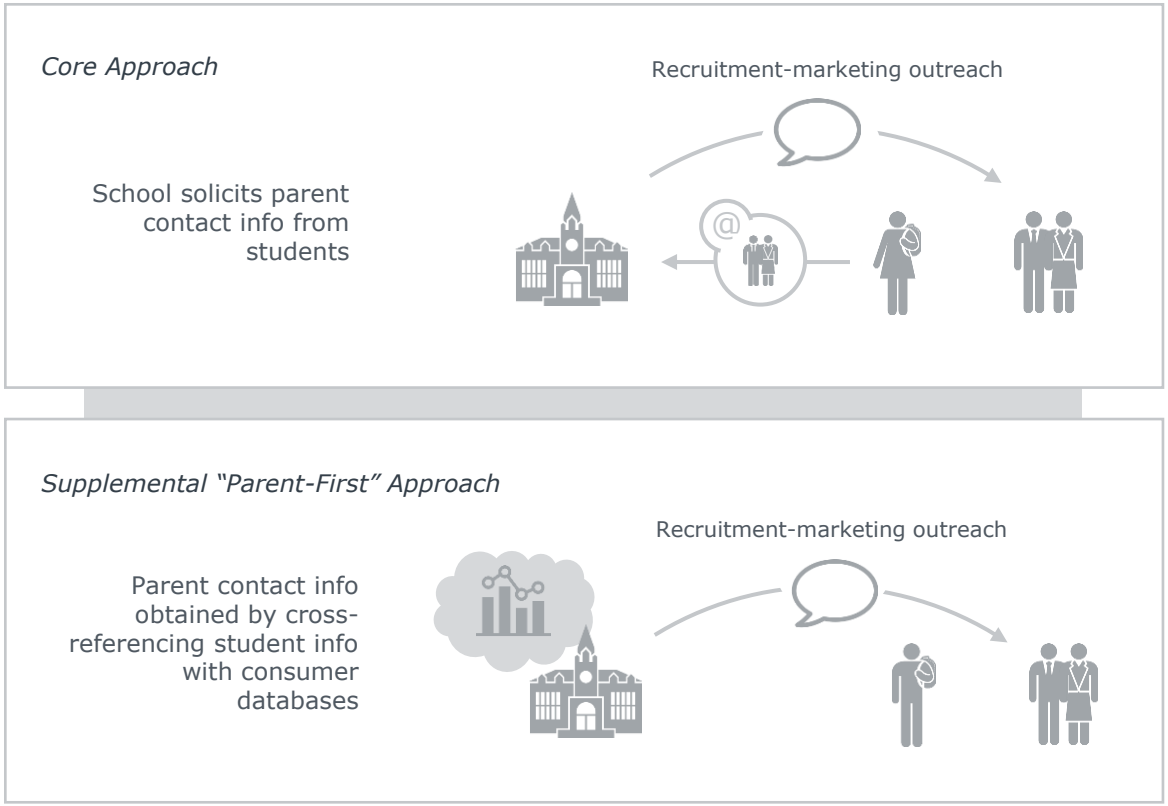
Expanding your reach

But what about students who have not responded to your outreach?

Parent contact information for almost a third of these students can be obtained by cross-referencing data you have on them (the students) with information from consumer databases.

Search nonresponders whose parents are contacted in this way have a 47% higher likelihood to apply—evidence that the messages are reaching parents and, through them, their students.

"Parent-First" Approach Enables You to Connect with Parents of Search Nonresponders



Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Unlocking the Full Potential of High School Guidance Counselors

An untapped resource

While several of the key barriers to college-going faced by non-consumers are precisely the sort that high school guidance counselors are well-positioned to address, it is often the case that they are too under-resourced and overburdened to make much of a difference for many students.

The case study on this page illustrates a solution Rowan-Cabarrus Community College developed to help realize the full potential of guidance counselors.

Insider expertise

The approach entails hiring counselors from feeder high schools to assist with student recruitment during the summer months—work that ranges from identifying promising candidates among students they know to advising on messaging used in recruitment outreach to keeping admitted students on the track to matriculation through the summer.

As indicated at right, the approach had a significant positive impact on the college's enrollment numbers, at a relatively modest cost.

High School Counselors Can Be an Ideal Complement to Your Team

Outreach gaps	*High School Counselor Advantages*
"We don't know them"	Familiar with non-consumer high schoolers
"We can't find them"	Have relationships with other district staff that aid outreach
"We lack bandwidth"	Untapped labor pool available during the summer

Getting Results at Rowan-Cabarrus Community College

Summer-Recruiter Rotation Details

Hours worked per week	**20**
Hourly wage	**$27**
Weeks of training required	**1**

Modest Expense, Big Impact

~$35K

Estimated total wage expense per summer for four "borrowed" HS counselors

+47%

Increase in first-time undergraduate enrollment from 2019 to 2021

Source: EAB interviews and analysis.

©2024 by EAB. All Rights Reserved.

Admissions-Counselor Time Repurposed for Admitted-Student Coaching

Changing roles

Fundamental alterations to student recruitment processes—most notably direct admission—have left some schools' admissions counselors with extra bandwidth, as formerly labor-intensive tasks such as application review are claiming less of their time.

Creative uses that schools are making of this extra capacity include upping the intensity of support offered to admitted students.

Counselor as success coach

Shown at right is the case of Augsburg University. Admissions counselor capacity freed up by the school's pivot to direct admission was redirected to the intensive coaching of admitted students, aimed at helping ensure a smooth path to matriculation.

Specific activities counselors engage in include developing a deeper understanding of individual students' needs, educating them on postsecondary options best suited to them, and connecting them with resources to help overcome whatever college-going barriers they may be facing.

Direct Admission Enables Admissions-Counselor Role Redefinition at Augsburg University

	Before Direct Admission	After Direct Admission
Primary focus	Driving funnel conversions—getting prospective students to inquire, apply, and deposit at Augsburg	Helping to ensure students end up in the higher education option (at Augsburg or elsewhere) that best suits their needs and that they are as prepared as possible for whatever that option is
Characteristic activities	Application-completion outreach, reading applicant files, rendering admit decisions	Talking to students about their higher-education options, evaluating their support needs and connecting them with related resources, helping remove barriers to matriculation

Around **1,300 hours** of counselor time were freed up by the switch to direct admission—time that was repurposed for success-coaching direct-admitted students, as described above.

Source: EAB interviews and analysis.

©2024 by EAB. All Rights Reserved.

This page intentionally left blank

©2024 by EAB. All Rights Reserved.

Remove procedural hurdles that hold students back

SECTION 6

©2024 by EAB. All Rights Reserved.

Streamlining Applications Boosts Enrollment

A trend toward simplification

Recent years have seen a growing trend of colleges, universities, and third-party application aggregators such as the Common App, making it easier for students to initiate and complete applications.

At the level of individual institutions, this most often means eliminating application requirements such as essays, letters of recommendation, and test scores.

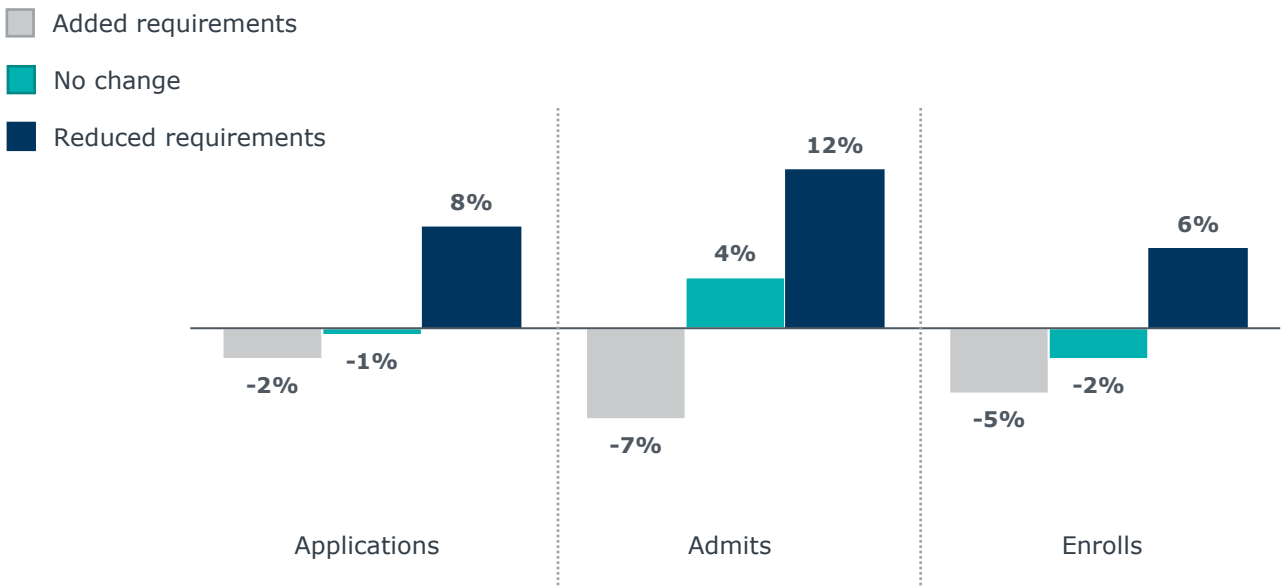
Quantifiable benefits

One much-discussed consequence of this trend is students submitting more applications. Less often mentioned is the sizable positive impact that reducing application requirements has on individual institutions' funnel metrics—a phenomenon illustrated by the chart on this page.

While it is impossible to say what portion of the increased enrollment shown at right is attributable to students who previously would not have matriculated, other research suggests that simplifying college search and application processes can in fact create "new" enrollment of this kind.

Average Change in Key Funnel Metrics, by Application-Requirement Approach

Moderately Selective US Colleges and Universities, 2018–2019



Source: EAB analysis of IPEDS data.

©2024 by EAB. All Rights Reserved.

Pushing the Envelope on Application Brevity

Ultra-streamlining

Some schools, in their quest to make applying as frictionless as possible for students, are taking application brevity to a new level. Shown at right is the case of an institution we're calling Karmann University.

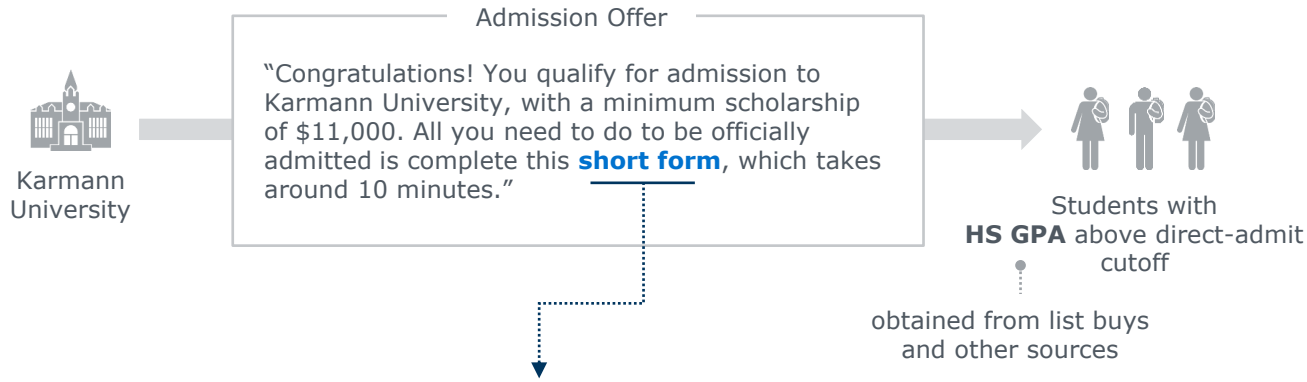
An "intake form"

By way of context, Karmann's abbreviated application is part of their embrace of direct admission, together with proactively notifying students of their eligibility for admission (though there is no reason the former could not have been implemented independently of the latter).

As noted, Karmann's application can be completed in 10 minutes and asks only for information that any student would have readily available.

Note also that Karmann deliberately avoids using the term "application," which it believes students find off-putting, referring to it instead as an "intake form."

Karmann University[1] Does Away with the Traditional Application



Radically Abbreviated "Intake Form" Replaces the Conventional Application

Mandatory fields		Optional fields
• Name	• Citizenship	• Ethnicity
• Birth date	• Military service history: self	• SSN
• Email address	• Military service history: family	• Interest in honors college
• Mobile phone number	• First-gen status	• Housing plans
• Mailing address	• History of higher ed attendance	• Parent contact info
• Desired entry term	• History of disciplinary action	• Parent education level
• Anticipated major	• Criminal history	• Name of high school
• Gender	• **Upload unofficial transcript**	• Anticipated graduation date

Some approaches let students upload transcripts later.

1) A pseudonym.

Source: EAB interviews and analysis.

©2024 by EAB. All Rights Reserved.

Direct Admission Is a Solution Tailor-Made for Non-Consumers

A powerful package

Earlier portions of this report referenced approaches to non-consumption based on proactively notifying students of their eligibility for admission and ones based on streamlining the application.

While both approaches can be implemented independently, direct admission combines them into one powerful package.

Multiple modes of action

The great strength of direct admission is its ability to simultaneously address multiple root causes of non-consumption.

For example, it reassures students who might otherwise have ruled out college due to doubts about their ability to get in or to succeed after enrolling. It also allows students who find researching college options and applying to schools overwhelming to receive offers without doing much or anything at all. Finally, it creates an occasion for you to get aid-award information in front of students who might otherwise assume that they can't afford college.

Two Defining Features of Fully Developed Direct-Admit Approaches

Proactive assurance

"You qualify for admission"

"If you apply, you will be admitted"

"Congratulations—you are admitted!"

Students are informed, prior to applying, that they are eligible for admission

Different ways of framing the message have varying levels of impact (and accuracy)

Radical streamlining

"Passive search"

Under some direct-admission approaches, students need not reach out to or even be aware of a college in order to receive an offer of admission from it; they can receive offers (or notifications of eligibility) without doing much or, in some cases, anything at all.

Minimal information requirements

Whatever information students must submit in order to receive and confirm offers of admission is kept to an absolute minimum and is easily obtained or generated.

Steps students must take to receive and accept admit offers are reduced to an absolute minimum

Source: EAB research and analysis.

©2024 by EAB. All Rights Reserved.

Make your school's offering more appealing to non-consumers

SECTION 7

©2024 by EAB. All Rights Reserved.

‘De-Fragmenting’ Students’ Time on Campus

Substantive change

An important aspect of addressing non-consumption is bringing your school’s offering in line with what matters most to students who are at risk of opting out.

While implementing the necessary improvements may be beyond the power of most admissions teams, enrollment leaders can and should advise their partners on the academic side of the house regarding what students are looking for.

Making college workable

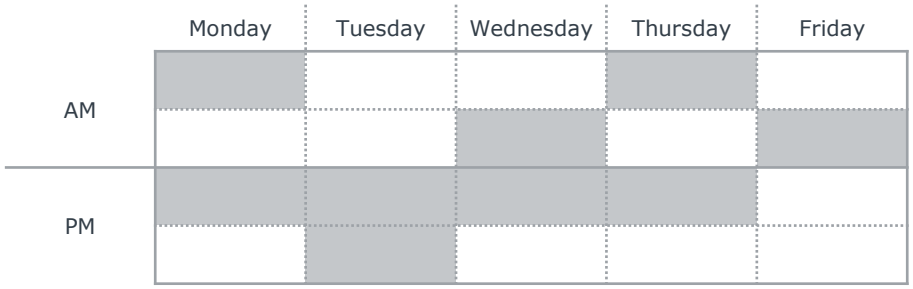
The case study at right shows an example of a change designed to boost the appeal of college-going to the lower-income demographics this institution serves—students who often have heavy work-related and personal commitments outside of school and some of whom have low levels of academic preparedness.

The consolidated class schedule it is based on creates large, predictably scheduled blocks of free time they can devote to their nonacademic work and creates large stretches of uninterrupted classroom time to enable focused learning.

A Pilot by Beamsville University[1]

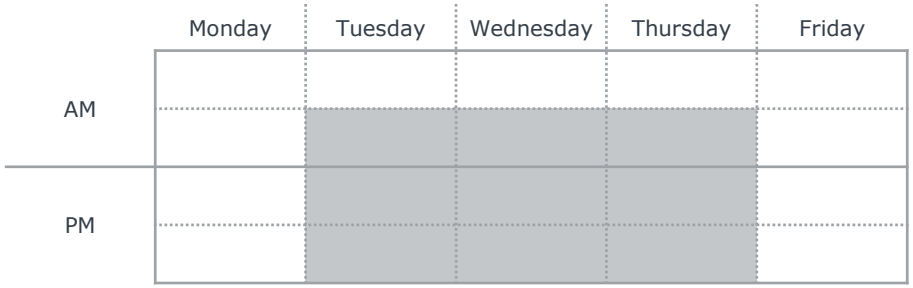
Student Class Schedule

Before



- Daily variation makes scheduling non-school commitments (e.g., shift work) difficult
- Small fragments of free time have limited utility

After



- Consistent daily schedule accommodates non-school commitments
- Free time consolidated into large blocks, well suited to multiple purposes

Program-Participant Profile

- Geared toward low-income (zero SAI) students
- Focused on students at lower end of the HS GPA range
- Cohort model

Notable Program Challenges

Creating a consolidated calendar is a heavy lift logistically and from a change-management perspective, requiring close coordination across multiple stakeholders.

1) A pseudonym.

Source: EAB interviews and analysis.

©2024 by EAB. All Rights Reserved.

Co-Opting the Year Off

In no rush to enroll

As noted elsewhere in this report, non-consumption is growing most rapidly among students from affluent households.

The primary reason students in this group cite for opting out is taking a year off, with travel featuring prominently among the activities they say they'll be pursuing instead of college.

Giving students what they want

Students' increasing inclination to take a year off may be due, in part, to Americans' growing awareness of and interest in the concept of the gap year.

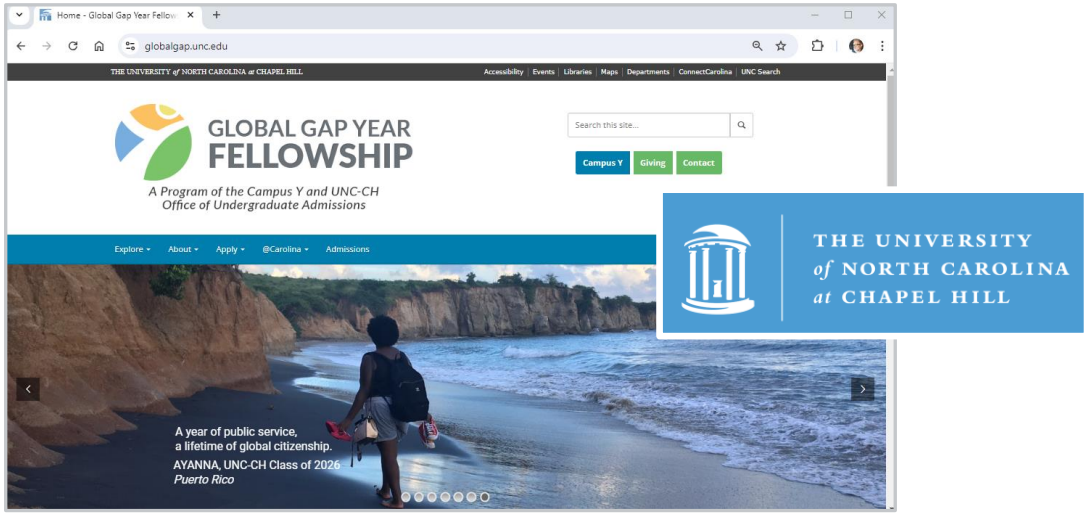
Some schools are capitalizing on this trend by developing gap-year programs of their own. Ideally, these serve as a means of keeping potential students engaged with the school and on the path to eventual matriculation, while honoring their desire for travel, leisure, or the pursuit of passion projects and personal development. Not incidentally, these programs also represent potential revenue streams for the schools sponsoring them.

Time Off Tops the List

>40%

of students from households earning $90K or more cite taking time off as their reason for not enrolling in college, making it the **#1 driver of nonconsumption** for this group, by a wide margin

UNC Chapel Hill's Global Gap Year Fellowship



"The Global Gap Year Fellowship at UNC-Chapel Hill is the first college-sponsored gap year program that allows **students to design their own experience** for a year abroad."

"The Fellowship **partners with the Office of Undergraduate Admissions**, which helps promote the program and select the recipients, and works with students as they follow their passions working with an international community."

Sources: EAB's 2024 First-Year Experience Survey; https://globalgap.unc.edu/.

©2024 by EAB. All Rights Reserved.

This page intentionally left blank

©2024 by EAB. All Rights Reserved.

We Know Students

enroll360 by EAB

Cultivate
Affinity-Building Inquiry and Nurture Campaigns

Apply
Demand-Generating Application Marketing Campaigns

Aid
Data-Driven Policy Creation and Financial Aid Optimization

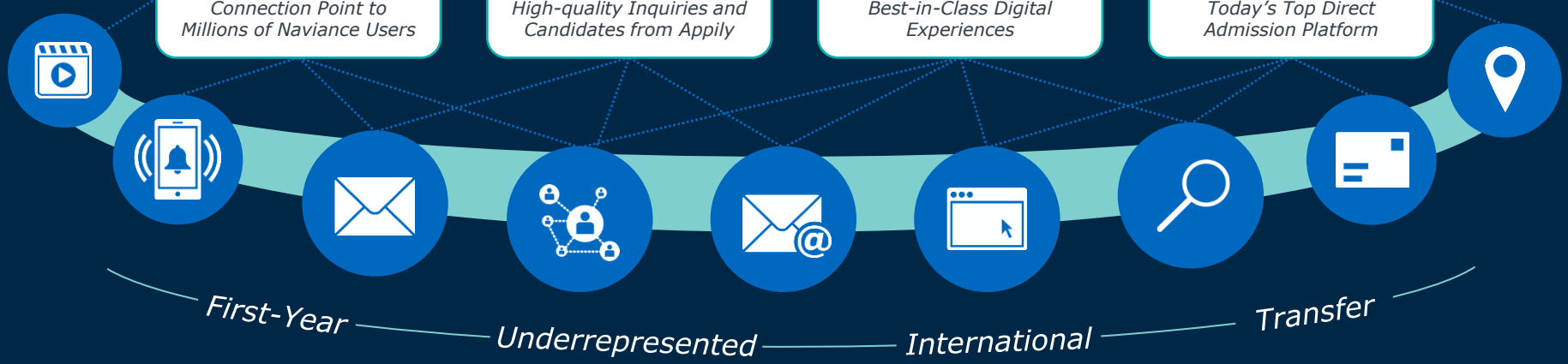
Yield
Actionable Analytics to Drive Conversion-Boosting Campaigns

Intersect
Connection Point to Millions of Naviance Users

Leads
High-quality Inquiries and Candidates from Appily

Virtual Tours
Best-in-Class Digital Experiences

Match
Today's Top Direct Admission Platform



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

To get started, email **eabenrollmentcomm@eab.com** or visit **eab.com/Enroll360**.

©2024 by EAB. All Rights Reserved. **eab.com**

This page intentionally left blank

©2023 by EAB. All Rights Reserved.

This page intentionally left blank

©2023 by EAB. All Rights Reserved.

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**.