Five Indicators For Your 2022 Yield Season

Thursday, February 17, 2022
Johanna serves as a strategic thought partner for higher education leaders across the student lifecycle.

Originally from Germany, she graduated from Justus Liebig University in Giessen with a Diplom degree (equivalent of an M.S.) in Social Sciences before she relocated to the United States.
Looking Back to Look Ahead

The Past Can Give Us an Indication for the Future

- What happened to application and enrollments?
- Why are students choosing college now?
- How far are they willing to travel?
- Do we have an even competitive playing field?
Applications and Enrollments
Application Volume is Trending Upward

Number of Common App Applications and Applications as of December 16, 2021

Source: Common App: Deadline Update: First-year Application Trends through December 16
Enrollment is Down

Enrollment Changes

- Private Not-for-profit Four-year
- Public Four-year
- Public Two-year

Fall 2020
-2.4%  -1.6%  -9.4%

Fall 2021
-0.6%  -2.5%  -6.0%

Total since 2019
-3.0%  -4.0%  -14.8%

Source: National Student Clearinghouse – Stay Informed Update November 18, 2021
Indicator #1

Types of Enrollment Schools
Students Increasingly Choose Public Doctoral Institutions

Public Masters and Private Baccalaureate Institutions Saw a Decline

<table>
<thead>
<tr>
<th>Type of Enrollment School</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Baccalaureate</td>
<td>54%</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>Private Masters</td>
<td>13%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Private Doctoral</td>
<td>12%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Public Baccalaureate</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Public Masters</td>
<td>8%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Public Doctoral</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Eduventures Admitted Student Research 2019 - 2021
## Competition is Indeed Increasingly Public Doctoral

This Pattern Can Be Observed for All Institutional Types

### Change in Destinations of Non-Enrolling Students for Master’s Level Institutions

<table>
<thead>
<tr>
<th>Type of Enrolling Institution</th>
<th>2019</th>
<th>2021</th>
<th>Type of Non-Enrolling Institution</th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>16%</td>
<td>3%</td>
<td>Private</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>19%</td>
<td>3%</td>
<td>Public - In-State Residents</td>
<td>40%</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>31%</td>
<td>3%</td>
<td>Public Master's</td>
<td>36%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>3%</td>
<td>Public Doctoral</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>14%</td>
<td>3%</td>
<td>Private not-for-profit Baccalaureate</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>18%</td>
<td>3%</td>
<td>Private not-for-profit Master's</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>3%</td>
<td>Private not-for-profit Doctoral</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Eduventures Admitted Student Research 2019 - 2021
Indicator #2

Demographics
Low-Income Students Lagging in the Recovery

Year to Year Growth in Common App Applicants

Source: Common App: Deadline Update: First-year Application Trends through December 16
# Doctoral Institutions Have Had Demographic Stability

## Changes in Demography - Enrolling Students 2019 to 2021

<table>
<thead>
<tr>
<th>Demographic Changes of Enrolling Students</th>
<th>Public</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Master's</td>
<td>Doctoral</td>
</tr>
<tr>
<td>First Generation</td>
<td>-4%</td>
<td>1%</td>
</tr>
<tr>
<td>Underrepresented Racial Minority</td>
<td>-2%</td>
<td>2%</td>
</tr>
<tr>
<td>Low Income</td>
<td>-4%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Eduventures Admitted Student Research 2019 - 2021
Indicator #3
Willingness to Travel
Travel Distance Decreased for Doctoral Institutions

Median Distance Between Enrolling School and Student’s Home

Source: Eduventures Admitted Student Research 2019 - 2021
Indicator #4

Enrollment Reasons
Location and Proximity Play Greater Role for Public Masters

Most Important Enrollment Reason – Public Institutions

<table>
<thead>
<tr>
<th></th>
<th>Public Masters</th>
<th>Public Doctoral</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>32%</td>
<td>42%</td>
</tr>
<tr>
<td>2021</td>
<td>30%</td>
<td>40%</td>
</tr>
</tbody>
</table>

- **Academic Program**
- **Community/Location**
- **Proximity/Family**
- **Affordability/Value**
- **Other**

Source: Eduventures Admitted Student Research 2019 - 2021
## Academics Still Drive Enrollment at Privates

### Most Important Enrollment Reason – Private Institutions

<table>
<thead>
<tr>
<th></th>
<th>Private Baccalaureate</th>
<th>Private Masters</th>
<th>Private Doctoral</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>39%</td>
<td>42%</td>
<td>52%</td>
</tr>
<tr>
<td>2021</td>
<td>38%</td>
<td>39%</td>
<td>51%</td>
</tr>
</tbody>
</table>

- **Academic Program**: 39% (2019), 38% (2021)
- **Community/Location**: 29% (2019), 27% (2021)
- **Proximity/Family**: 5% (2019), 5% (2021)
- **Affordability/Value**: 18% (2019), 20% (2021)
- **Other**: 9% (2019), 11% (2021)

### Source

Source: Eduventures Admitted Student Research 2019 - 2021
Indicator #5

Student Mindsets
Looking at Desired Pathways Through Student Mindsets
We Can Organize Students into Mindsets

**Career**
- EXPERIENTIAL INTEREST
- CAREER PRAGMATISTS

**Experience**
- SOCIAL FOCUS
- EXPLORATION & MEANING

**Academic**
- CAREER THROUGH ACADEMICS
- GRAD SCHOOL BOUND

[CAREER PRAGMATISTS]

[EXPERIENCE]

[ACADEMIC]
More Career Mindset Students at Publics

Admitted Student Mindsets - Public Institutions

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Masters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiential Interest 2.0</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Career Pragmatists 2.0</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Social Focus 2.0</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>Exploration and Meaning 2.0</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Career through Academics 2.0</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>Grad School Bound 2.0</td>
<td>9%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Doctoral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiential Interest 2.0</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Career Pragmatists 2.0</td>
<td>7%</td>
<td>13%</td>
</tr>
<tr>
<td>Social Focus 2.0</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Exploration and Meaning 2.0</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Career through Academics 2.0</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Grad School Bound 2.0</td>
<td>18%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Source: Eduventures Admitted Student Research 2019 - 2021
# Career Mindsets Also Increased at Privates

## Admitted Student Mindsets – Private Institutions

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Private Baccalaureate</strong></td>
<td>14% 7% 31% 16% 16% 15%</td>
<td>15% 15% 20% 20% 15% 15%</td>
</tr>
<tr>
<td><strong>Private Masters</strong></td>
<td>19% 12% 27% 11% 23% 8%</td>
<td>21% 18% 23% 10% 21% 8%</td>
</tr>
<tr>
<td><strong>Private Doctoral</strong></td>
<td>16% 5% 27% 16% 15% 21%</td>
<td>16% 10% 20% 16% 18% 20%</td>
</tr>
</tbody>
</table>

- Experiential Interest 2.0
- Career Pragmatists 2.0
- Social Focus 2.0
- Exploration and Meaning 2.0
- Career through Academics 2.0
- Grad School Bound 2.0

*Source: Eduventures Admitted Student Research 2019 - 2021*
Forecast for Spring 2022
Big Waves

**Public Doctoral Institutions**

- Continued large application volume will likely convert well into enrollments
- Greater diversity in the student body should be expected
- These students may need more support
- Offer onboarding and continued support services to reduce retention risk
Calm Waters, But a Storm May Be Brewing

Private Doctoral Institutions

• The application volume looks promising, but yield remains uncertain
• The new test-optional environment is encouraging students to apply to more institutions, and more reach schools
• Increased competition among private doctoral institutions, but also with the public doctoral juggernaut
• Diversity also increased at private doctoral institutions
• Solidify financial aid procedures and define what “test optional” means at your institution
Possible Change in Atmosphere

Private Masters

• Fewer first-generation and low-income students paired with greater geographic reach

• Academics don’t drive enrollment as much anymore, but students are focused on career outcomes

• Enrollment woes are possible, but there is potential to make an impact

• Need to make a case for what you do best: career preparation? Learning environment? What else?
Possible Change in Atmosphere

**Private Baccalaureate**

- Enrollment decreased, diversity is down, but geographic distance increased
- Greater focus on career outcomes and affordability/value
- Students and families want liberal art outcomes, but in a pragmatic context
- Need to make the connection between a liberal arts education and career preparedness
Choppy Waters

*Public Masters*

- Key target students may choose larger institutions
- Lost group of students who didn’t apply/attend college at all
- Need to reconnect with these students
- A new kind of non-traditional student: get them back to school before life gets in the way
- Confront their larger public peers with an emphasis on outcomes and student support
Additional Resources
Digital marketing is a topic that is often misconstrued. Some believe digital marketing is simply their email strategy, what their institution posts on the social media accounts, and their website presence.

But those responsible for driving enrollment know it involves a bit more than that—and just as importantly, they understand that any successful strategy begins with a deeper understanding of their primary stakeholder: prospective Gen-Z students.
Enrollment leaders are often challenged with “doing more, with less”. As you look for new ways to better target your student markets, how can you efficiently grow and change your class by coupling a few—or many—target markets together?

- Ways to future-proof your enrollment strategy and avoid being caught flat-footed by unforeseen challenges in the marketplace
- As more institutions shift their institutional marketing strategy under the enrollment office, how can you help educate one another to be the most productive in the long run?
- Practical enrollment techniques and innovative digital marketing strategies that can improve your results for this spring and beyond

encoura.org/webinars

Thursday, February 24, 2022 at 2pm EST/1pm CST

Lyndenise Berdecía
Regional Director, Digital

Steve Lazowski
Enrollment Services Consultant

Chris Tyburski
RVP, Enrollment Services
Surveying your own admitted students is inarguably valuable, especially at a time of declining first-time student enrollment. But sometimes, the self-selecting nature of your admitted student body—who were all interested enough to apply to your institution in the first place—can mask greater market forces at play.

For instance, do you know why, like many institutions, the difficulty of attracting students in your key markets has increased?
By participating in the Eduventures Admitted Student Research, your office will gain actionable insights on:

- Nationwide benchmarks for yield outcomes
- Changes in the decision-making behaviors of incoming freshmen that impact recruiting
- Gaps between how your institution was perceived and your actual institution identity
- Regional and national competitive shifts in the wake of the post-COVID-19 environment
- Competitiveness of your updated financial aid model

Sign up today!

encoura.org/asr
Thank you.

Johanna Trovato
Eduventures Senior Analyst

E: jtrovato@eduventures.com

ENCOURA.ORG