Enrollment in a Time of Turbulence

Understanding Key Market Forces Redefining the Enrollment-Management Challenge
Start with best practices research

- Research Forums for presidents, provosts, chief business officers, and key academic and administrative leaders
- At the core of all we do
- Peer-tested best practices research
- Answers to the most pressing issues

Then hardwire those insights into your organization using our technology & services

**Enrollment Management**

Our *Enrollment Services* division provides data-driven undergraduate and graduate solutions that target qualified prospective students; build relationships throughout the search, application, and yield process; and optimize financial aid resources.

**Student Success**

Members of the *Student Success Collaborative* use research, consulting, and an enterprise-wide student success management system to help students persist, graduate, and succeed.

**Growth and Academic Operations**

Our *Academic Performance Solutions* group partners with university academic and business leaders to help make smart resource trade-offs, improve academic efficiency, and grow academic program revenues.

1.2B+
Student interactions annually

1M+
Individuals on our student success management system

1,200+
Institutions we are proud to serve

1
Goal: Make education smarter
Services to Support St. Cloud

Building long-term, sustainable enrollment

Sophomore/Junior Marketing Programs

Search

Shape the size, geographic diversity, academic quality, and demographic mix of your inquiry pool

Fulfillment

Sustain the conversation with Search responders and encourage the next step in your relationship—visiting your campus and further exploring your offerings

Senior Marketing Programs

Custom Application Marketing

Activate your application as a marketing and customer service platform. Use intensive digital media and email campaigns to build affinity with applicants and shepherd them successfully through application submission, beginning before the summer of senior year through our Early Application Marketing program. Demonstrate your commitment to affordability, while prompting FAFSA reminders and filings.

List Sourcing

Most schools have an unrecognized ability to draw students from outside of their legacy markets and demographic profiles. Our list-sourcing expertise maximizes the value of purchased names.
1. A Demographic Shift
2. Unfavorable Family Finances
3. An Accelerated Aid Calendar
4. The Complexity of Targeting Students
5. Parent Engagement Imperative
Majority Will See Continued Enrollment Declines

Majority of Regional Four-Year Institutions Expect Student Declines

2012-2029

Student Demand Expected to Grow 14% for Selective Institutions

2012-2029

Other states are marked with different colors to indicate the percentage change in student enrollment from 2012 to 2029:

- Black: <-15%
- Dark blue: <-15% to -2.5%
- Light blue: <-2.5% to 2.5%
- Orange: 2.5% to > 7.5%

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Minnesota High School Graduate Change

Graduating Classes 2018 – 2028

Minnesota

<table>
<thead>
<tr>
<th>Year</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>61,766</td>
</tr>
<tr>
<td>2019</td>
<td>62,303</td>
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<tr>
<td>2020</td>
<td>62,751</td>
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<td>2021</td>
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<td>63,737</td>
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<tr>
<td>2027</td>
<td>61,839</td>
</tr>
<tr>
<td>2028</td>
<td>61,839</td>
</tr>
</tbody>
</table>

Midwestern Region

<table>
<thead>
<tr>
<th>Year</th>
<th>Midwestern Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
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</tr>
<tr>
<td>2019</td>
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<td>61,839</td>
</tr>
<tr>
<td>2028</td>
<td>61,839</td>
</tr>
</tbody>
</table>

Source: Knocking at the College Door, 2016, WICHE

1) Midwestern Region includes: NE, KS, MN, IA, MO, WI, IL, MI, IN, OH
New Challenges Even in Growth Areas

Future Growth Depends on Nontraditional Demographics

Projected Change in Annual High School Graduates by Ethnicity, Graduating Class 2018 Versus 2028

- White: -252K
- Black: -34K
- Asian: 58K
- Hispanic: 150K

Growth Segments Pose Enrollment Challenges

Demographic and Student Success Characteristics, Non-Hispanic Students Compared to Hispanic Students

- First-Generation: 56% (Non-Hispanic), 78% (Hispanic)
- Income Below Poverty Level: 29% (Non-Hispanic), 62% (Hispanic)
- Complete Within Five Years: 70% (Non-Hispanic), 49% (Hispanic)

1) Includes pacific islanders.

Source: WICHE, "Knocking at the College Door," December 2016; EAB research and analysis.
Serving Gen Z with Gen A On Deck

Demographic Definitions

By Birth Years

Generation Y
1985-1994
AKA millennials

Generation Z
1995-2010
AKA iGen
Currently between 8 and 23 years of age
Will constitute 1/3 of the US population by 2020

Generation A
2011-2025
AKA generation alpha
First generation born entirely within the 21st century
Millennials’ children

Source: EAB research and analysis.
Generation Z’s Defining Traits

- **Socially Responsible**: 26% of 16 to 19 year olds volunteer on a regular basis.

- **Purpose-Driven**: 67% of Gen Z want their careers to have a positive impact on the world.

- **Cost-Conscious**: 60% say their number one concern is to avoid drowning in college debt.

- **Culturally Open**: 72% of Gen Z believe racial equality to be the most important issue today.

- **Tech Expectant**: 62% of Generation Z will not use apps or websites that are difficult to navigate.
Media Habits of Gen Z

Understanding Behaviors Across a Complex Media Landscape

A Gen Z Digital-Communications Glossary

Email

Talking to old people without a stamp.”

Facebook

Where my parents think I am. My alter ego.”

Instagram

Where my real pictures are (that I don’t want my parents to see).”

YouTube

My primary TV and source to stream everything.”

Snapchat

No permanent record of my conversations with my closest friends.”

Twitter

My reason to complain and to listen to my friends complain.”

1. A Demographic Shift

2. Unfavorable Family Finances

3. An Accelerated Aid Calendar

4. The Complexity of Targeting Students

5. Parent Engagement Imperative
The daunting financial burden of higher education...

Average Household Savings and Debt

- $18K Average savings
- $137K Average debt

Net Price as a Percentage of Median Income

- 25% Public schools
- 44% Private schools

Growth in “Real Cost” of College

- 36% Public schools
- 26% Private schools

...is testing families’ resolve

Families start planning for college early...

- 9 in 10 families start planning for college when their child is in preschool

...but are still unable to pay

“Although nearly 9 in 10 families have anticipated their child’s college attendance since preschool, fewer than half that many agree they had a plan to pay for all years of college before the student enrolled.”

“How America Pays for College” 2017
Affordability Overview: Minnesota

Number of West North Central Region\(^1\) Households By Income Segment (Thousands), 2015

Data Source: U.S. Census

<table>
<thead>
<tr>
<th>Income Segment</th>
<th>Number of Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0K-$50K</td>
<td>3,570</td>
</tr>
<tr>
<td>$50K-$100K</td>
<td>2,615</td>
</tr>
<tr>
<td>$100K-$200K</td>
<td>1,875</td>
</tr>
<tr>
<td>$200K+</td>
<td>447</td>
</tr>
</tbody>
</table>

Average Minnesota University Net Price as a Percent of Minnesota Median Household Income\(^2\)

Data Source: IPEDS, U.S. Census

Note: Net price calculated for students receiving financial aid (in-state students only for publics).

Average Percentage:
- Public: 22%
- Private: 35%

Minnesota Median Household Income, 2014

Data Source: U.S. Census

$67,244

1) West North Central region includes Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, and South Dakota.
2) Net price data from IPEDS variable “Average net price-students awarded grant or scholarship aid, 2014-15”, in state for public institutions and all students for private institutions.

Revenue Pressures Force New Recruitment Trends

Private Institutions Under Growing Pressure to Discount

Average Tuition Discount Rate for First-Time Full-Time Students, Private Not-for-Profit Colleges and Universities

Revenue Demands Spur Publics to Recruit Out-of-State Students

Growth in In- and Out-of-State First-Time College Student Enrollment, 2007-2013

Students Acting More Like Consumers

Students Applying to More Schools, Becoming Increasingly Price-Sensitive

Students Applying to 6+ Schools
2004 versus 2015

% of Students Identifying Factor as "Very Important" to College Choice

Aid Awarded
Cost of Attendance

“Before, when families got a scholarship offer they said, ‘Thank you!’ Now they say, ‘Is this your best offer?’”

Director of Admissions
Private Master's College in the Midwest
1. A Demographic Cliff

2. Unfavorable Family Finances

3. An Accelerated Aid Calendar

4. The Complexity of Targeting Students

5. Self-Reporting on the Rise
Families Are Embracing the Early FAFSA

Majority of Students Now Applying Before January 1

FAFSAs Submitted, by Date

All First-Time Students in the United States, Entering Classes 2015–2018

51% of FAFSAs submitted by 12/31 for Entering Class 2017

6.5% Increase in FAFSAs submitted for Entering Class 2017 over previous year

Source: FAFSA Completion by High School and Public School District, published and unpublished FSA data; EAB analysis.
Early Filers Are High-Achieving

Academic Ability Correlated with Early Filing

Cumulative Average Academic Index\(^1\) of Students by FAFSA Filing Month\(^2\)

Early filers under new FAFSA schedule have **stronger academic profile** than previous early filers

1) Calculated based on GPA, test scores, and high school class rank; 1 is the lowest score; 5 is the highest.
2) As indicated on ISIRs sent to EAB Financial Aid Optimization client schools by students applying to 2016/17 and 2017/18 academic years.

Source: EAB interviews and analysis.
Early Filers Have Higher-EFC

Affluence Correlated with Early Filing

Cumulative Average EFC of Students by FAFSA Filing Month

Early filers under new FAFSA schedule have higher EFC than previous early filers

Source: EAB interviews and analysis.
Most Schools Advancing Aid Timelines

Aid Packages Being Mailed Earlier Than in Previous Years

Majority of Schools Sent Aid Letters > 2 Months Earlier for 2017/18 Award Year

*Schools Surveyed by EAB Enrollment Services*

n=105 (76 private institutions, 29 public institutions)

- >8 weeks earlier: 54.0%
- 5-8 weeks earlier: 32.1%
- 3-4 weeks earlier: 10.0%
- 1-2 weeks earlier: 2.0%
- No earlier: 1.9%

52% of surveyed schools reported they would start awards even earlier for the 2018/19 award year

School Response Has Created a ‘New Early’

Regional Privates Lead Fall Packaging Trend (with Others Following)

November Is the New March

Packaging Dates for EMF Member Private Schools with Rolling Admissions, 2018/19 Award Year

n=57

<table>
<thead>
<tr>
<th>Oct 1–Nov 14</th>
<th>Nov 15–Dec 31</th>
<th>Jan 1–Feb 14</th>
<th>Feb 15–Mar 31</th>
<th>April 1 &amp; later</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.2%</td>
<td>28.0%</td>
<td>22.8%</td>
<td>30.0%</td>
<td>7.0%</td>
</tr>
</tbody>
</table>

School response creating new timing categories

Very Early
Oct 1 to Mid-Nov

The New Early
Mid-Nov to Mid-Feb

Mid-Market
Mid-Feb to Mar 31

Late
April 1 & later

Opportunity to be very first in the mailbox
Letters received earlier than average, but not very first
Closer to traditional timeline
Primarily large public schools, precipice schools

Source: EAB research and analysis.
1. A Demographic Cliff
2. Unfavorable Family Finances
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List Sources are Increasingly Complex and Nuanced

Deters Critical First-Mover Advantages

Student Names Released Year-Round

- SAT/PSAT
- ACT/Pre-ACT
- CBSS
- NRCCUA
Students are 2x more likely to enroll when contacted as sophomores

Likelihood to enroll indexed to senior value

- **Sophomores**: 1.95
- **Juniors**: 1.65
- **Seniors**: 1.00

80% of high school student names first available in sophomore or junior year

Sophomore recruits’ SAT scores are 66 points higher than seniors

Average SAT score at enrollment

- **Sophomores**: 1168
- **Juniors**: 1127
- **Seniors**: 1102

1100 average SAT score for students recruited via non-EAB marketing

Source: Enrollment Services research and analysis.
Minnesota Tester Population

Entering Class 2019

College Board & ACT Population
Below is a review of the student population available within College Board & ACT. For Entering Class 2019, 41% of ACT and 0% in College Board have been purchased to date.

Which students are available?
- Fall outside of previously purchased quality parameters
- No College Board purchases
- Senior testers that have become available during latest data feeds
- PSAT and AP testers in College Board

ACT
Total Students Available: 30,000
Students Not Purchased: 15,900

College Board
Total Students Available: 19,000
Students Not Purchased: 19,000

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2019 Volumes by Select Distance Bands

<table>
<thead>
<tr>
<th>ACT/CB Purchase History (Entering Class 2019)</th>
<th>0 - 50</th>
<th>51 - 150</th>
<th>151 - 250</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchased</td>
<td>3,244</td>
<td>11,760</td>
<td>3,785</td>
</tr>
<tr>
<td>Not Purchased</td>
<td>6,712</td>
<td>30,468</td>
<td>19,888</td>
</tr>
</tbody>
</table>

**50 Miles**
- 7 ZIP3 areas covered
- 13% of 250 Mile Testers

**51-150 Miles**
- 25 ZIP3 areas covered
- 56% of 250 Mile Testers

**151-250 Miles**
- 46 ZIP3 areas covered
- 31% of 250 Mile Testers

St. Cloud State University
Creating Your Custom Targeting Strategy

EAB’s Targeting Methodology Customizes Across 4 Components

1. **Volume**
   - Evaluate previously purchased search lists for ongoing opportunities
   - Recommend new additions for Sophomore/Junior and Senior search campaigns

2. **Sources**
   - Recommend optimal mix of names from relevant list providers:
     - ACT
     - College Board
     - College Bound Selection Service
     - NRCCUA
     - Christian Connector, as appropriate
   - Track all sources’ release dates to get names as they become available

3. **Geographic Markets**
   - Analyze historical data of all current market segments—primary, secondary, tertiary, and outreach—based on penetration
   - Recommend expanding or trimming within current markets
   - Evaluate and recommend new markets likely to produce favorable outcomes

4. **Class Shaping**
   - Understand class shaping goals including academic quality, diversity, and other characteristics
   - Recommend individual shaping goals for each market segment

EAB **continuously analyzes name volumes** from each list provider throughout the cycle to identify opportunities that further support your enrollment goals.
1. A Demographic Cliff
2. Unfavorable Family Finances
3. An Accelerated Aid Calendar
4. The Complexity of Targeting Students
5. Parent Engagement Imperative
Parents Highly Influence College Choice

Number of Students Identifying as “Highly Influential” in Enrollment Decision

74% Of parents think schools should communicate directly with them

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Source: Enrollment Services research and analysis.
Influencing the Influencers

Marketing-Outreach to Parents Impacts Student Behavior

Case in Point: Increased Email Intensity Boosts Application Rate

Findings from EAB Testing

<table>
<thead>
<tr>
<th>Parent Contacts</th>
<th>Applications$^1$</th>
<th>Admits</th>
<th>Deposits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control</td>
<td>4,262</td>
<td>7.1%</td>
<td>303</td>
</tr>
<tr>
<td>Test</td>
<td>4,266</td>
<td>7.8%</td>
<td>333</td>
</tr>
</tbody>
</table>

Additional emails sent to parents before first application deadline

10% Increase in applications relative to control group

Effect carries through to deposit

1) Completed applications.

Source: EAB research and analysis.
EAB’s Parent Survey in Brief

Profile of Survey Participants

Total Respondents
1,566
Parents (households) participated in total

Parents’ Education Level
78%
Of respondents have a bachelor’s degree or higher

Student’s Current Class Year
18% Freshman
40% Sophomore
40% Junior

Geographical Distribution

Income

Source: EAB research and analysis.
An Up-Front Opportunity

Parents Consider a Broader Range of College Options Earlier On

Case in Point: Locations Parents Are Open to Considering

Percentage of Responding Parents, by Student’s High School Year

Parents consider the broadest range of potential locations earlier in their student’s high school career.
# Stage-Specific Concerns

Parents’ Main Topics of Interest Change Across the Funnel

## Topics Most Frequently Selected by Parents, by Student’s High School Year

<table>
<thead>
<tr>
<th>Most Frequently Selected Topics</th>
<th>Freshman</th>
<th>Sophomore</th>
<th>Junior</th>
<th>Senior</th>
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</thead>
<tbody>
<tr>
<td>Costs</td>
<td>✔️</td>
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<td>Scholarships</td>
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<tr>
<td>Sources of funds to pay</td>
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<tr>
<td>Admission requirements</td>
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<td>Majors/minors</td>
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<td>Campus safety</td>
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<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
</tbody>
</table>

Source: EAB research and analysis.
Parents Are Mostly Looking to You

School Websites and Visits Top the List of Parents’ Favored Sources

What Information Sources Do Parents Rely on Most?

Percentage of Responding Parents, Ten Most Frequently Cited Sources

- Specific college websites (60%)
- Campus visits (50%)
- Non-school websites (30%)
- College fairs (25%)
- High school counselors (20%)
- Friends and family (15%)
- U.S. News (10%)
- Letters from colleges to students (5%)
- Other college rankings (5%)
- Other parents (5%)

Top two sources (by a wide margin) are also ones over which schools have direct control.

Source: EAB research and analysis.
Lesson 12: Leverage Parents’ Responsiveness to Digital Ads

Parents Are Highly Engaged Online

Parents Respond to Digital Ads at Rates Even Higher Than Students Do

Click Rate, Students Versus Parents

Indexed to Student Response Rate, Facebook Ads by Theme, EAB Enrollment Services Partner Institutions

Parent click rate up to 1.5 times higher than that for students

- 24% of parents click on ads sometimes, often, or always
- 31% of parents never or rarely hide digital ads on Facebook
- 68% of parents do not use ad blockers on social media

1) Call to action: “learn more.”
2) Call to action: “learn more.”
3) Call to action: “apply now” (students), “sign up” (parents).

Source: EAB research and analysis.
Findings: Financial Aid Flash Poll

Did you alter your awarding timeline because of the earlier FAFSA?

- 66.3% Yes, made awards earlier
- 33.7% Yes, made awards later*
- No

*0.0% made awards later

Looking ahead to the Fall 2019 timeline, which are you most likely to do?

1. Keep the same schedule 73.5%
2. Accelerate the timeline 19.3%
3. Decelerate the timeline 1.2%
4. Cannot say at this time 6.0%
Findings: Financial Aid Flash Poll

Did the earlier timing make it easier for families to complete the FAFSA?

- **16.9%** said no
- **83.1%** said yes

Said PPY made it easier for families to complete the FAFSA.
Combined Data Assets and Expertise Yielding Unrivaled Insight

**Student Success + Enrollment**

**High School**

- Geographical proximity
- Timing of first recruitment contact
- Parental engagement during recruitment
- Campus visit activity

**University**

- Financial performance
- Course registration
- Academic records
- Extracurricular engagement

**Data from millions of student interactions**

- Student success data fed into recruitment efforts
- Recruiting more best-fit students

- Recruitment data fed into student success efforts
- Identifying drivers of persistence

Source: EAB | Royall research and analysis.
Late Launch Application Marketing Success

Institutional Profile

- A regional public in the West with a total undergraduate enrollment of ~8,000
- Due to slow enrollment growth, the institution signed on for a late application campaign launch on January 28th, achieving a 20% increase in enrollment

Fall Freshman Enrollment
2 Years Prior-Year 1

- 2 Years Prior to EAB: 1,002
- 1 Year Prior to EAB: 1,149
- Year 1: 1,374

Fall Freshman Submissions by Date
1 Year Prior-Year 1

- 10/1: 4,675
- 11/1: 5,166
- 12/1: (data not provided)
- 1/1: 4,675
- 2/1: 5,166
- 3/1: (data not provided)
- 4/1: (data not provided)
- 5/1: (data not provided)
- 6/1: (data not provided)
- 7/1: (data not provided)
- 8/1: (data not provided)

Fall Freshman Activity
1 Year Prior-Year 1

- Submitted Applications: 4,675
- Admits: 3,028
- Enrollment: 1,149

- Submitted Applications: 5,166
- Admits: 3,528
- Enrollment: 1,374

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### Market Saturation with Multi-Class Recruitment

#### Institution Profile
- Regional public university in Western US with a total undergraduate enrollment of ~15,000
- Hires EAB late in cycle (March) to reverse negative trend
- University with a desire to saturate the market in their backyard

#### Enrollment Impact of Multi-Year, Multi-Class Search

<table>
<thead>
<tr>
<th></th>
<th>Prior to EAB</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sophomore</td>
<td>923</td>
<td>1,153</td>
<td>1,354</td>
<td>1,363</td>
<td>1,424</td>
</tr>
<tr>
<td>Junior</td>
<td></td>
<td>1,009</td>
<td>352</td>
<td>284</td>
<td>329</td>
</tr>
<tr>
<td>Senior</td>
<td></td>
<td></td>
<td>690</td>
<td>389</td>
<td>170</td>
</tr>
<tr>
<td>Other</td>
<td>923</td>
<td>1,002</td>
<td>1,002</td>
<td>690</td>
<td>563</td>
</tr>
</tbody>
</table>

#### In-State Enrollment Growth

<table>
<thead>
<tr>
<th></th>
<th>Prior to EAB</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sophomore</td>
<td>849</td>
<td>1,021</td>
<td>1,240</td>
<td>1,289</td>
<td>1,279</td>
</tr>
<tr>
<td>Junior</td>
<td></td>
<td>143</td>
<td>352</td>
<td>283</td>
<td>167</td>
</tr>
<tr>
<td>Senior</td>
<td></td>
<td>878</td>
<td>888</td>
<td>619</td>
<td>361</td>
</tr>
<tr>
<td>Other</td>
<td>849</td>
<td>878</td>
<td>888</td>
<td>619</td>
<td>442</td>
</tr>
</tbody>
</table>
The biggest value is the fact that Enrollment Services genuinely cares about your success.... I am not just paying someone money to get us an outcome. **It is the customer service element that sets them apart.... All of the touches are all top notch and professional. Every T is crossed; that goes a long way.**

*Vice President for Enrollment Liberal Arts College in the Northwest*
<table>
<thead>
<tr>
<th>Category</th>
<th>Metric</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivering Consistent Results</td>
<td>8.3% average annual net tuition revenue increase</td>
<td>2.4-pt average annual SAT score increase</td>
</tr>
<tr>
<td>Impact Beyond Enrollment</td>
<td>5% pt higher first-year retention rates for EAB-recruited students</td>
<td>13% higher rates of post-graduation advancement giving for EAB-recruited students</td>
</tr>
<tr>
<td>Serving Diverse Enrollment Aims</td>
<td>10% increase in deposits for schools seeking growth</td>
<td>3.6-pt increase in SAT score for schools not seeking growth</td>
</tr>
<tr>
<td>Creating Sustainable Partnerships</td>
<td>7:1 average ROI for first-year EAB partner schools</td>
<td>89% renewal rate across EAB partner schools</td>
</tr>
</tbody>
</table>