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# The Highlights

A Brief and Incomplete History of Our Landscape

Trends

New Reality, New Approach

# Higher education recruitment has shifted seismically since enrollment management was first introduced in 1976

**2025**
The demographic cliff begins

**2018**
HS graduate population at an all-time high

**2020**
Covid-19 creates a global disruption and uncertainty

**2023**
Competition for applicants continues to intensify

**2024**
The number of high school graduates will peak at another high

**2037**
The year of projected demographic rebound
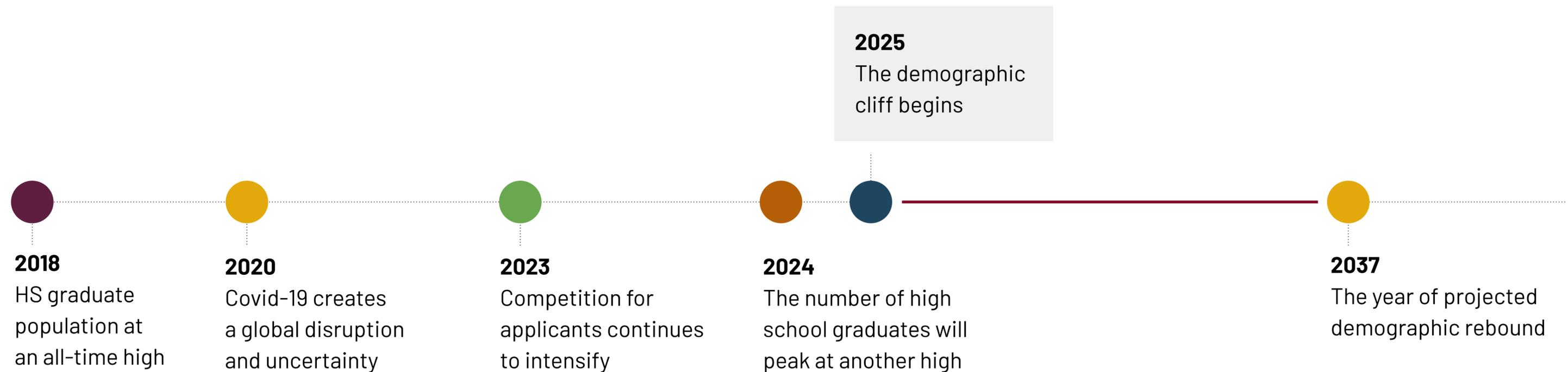
# Landscape by the Numbers

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**1 Million**
Fewer test takers in 2023 compared to 2019

**35%**
College-aged students who report that they tend to distrust education institutions

**22%**
The drop in students enrolling in college directly from high school in 2022

**6**
The typical number of colleges and universities that seniors apply to

**25%**
Gen Z students who discover one or more schools through social media

**55%**
The average tuition discount rate for first-year, full-time students in 2021-22

**92%**
Students who indicated that being authentic and true to oneself is extremely or very important

**30%**
The percentage of college freshmen who drop out

**1st**
Generation to live their entire lives in an online world

**$58T**
The amount of money transitioning from Boomers to Xer's and Millennials this decade

# Pressure Forces Change

**Trends**

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TREND #1:

# A New Reality for Lead Generation

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TREND #2:

# An Expectation of Authenticity

TREND #3:

# Market Share Industry Dynamics

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TREND #4:

# Buyer Controlled Admissions

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TREND #5:

# Attention and Experience Economies

# Less like this

More
like this

New Reality,
New
Approach

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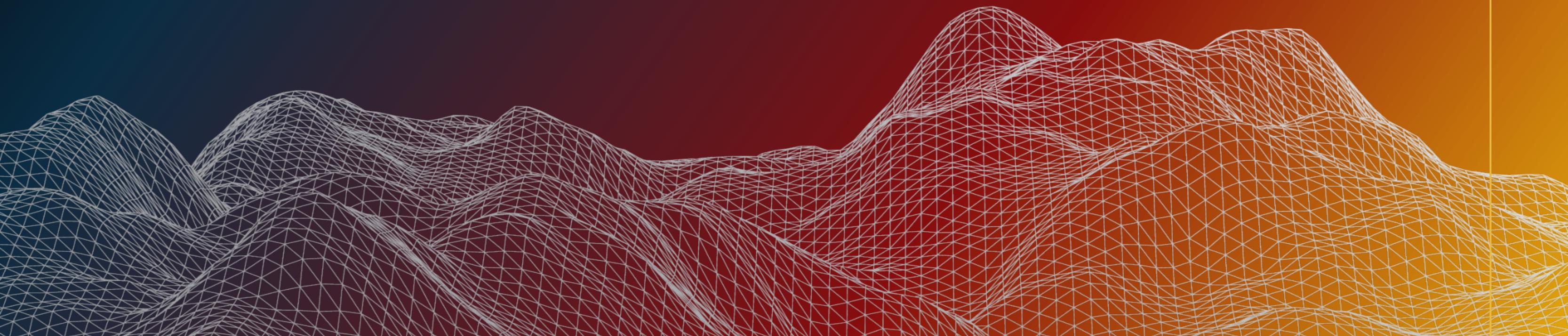
# Yield-focused Approach to Student Search

**+ *Tip the Scale***
Identify those with greater propensity to take action, by using market research and predictive modeling.

**+ *Use personality to personalize***
Capture attention and build connections using personality, motivation, and beliefs data points.

**+ *Campaigns should be agile***
Drive engagement with precision digital advertising and dynamic email communications.
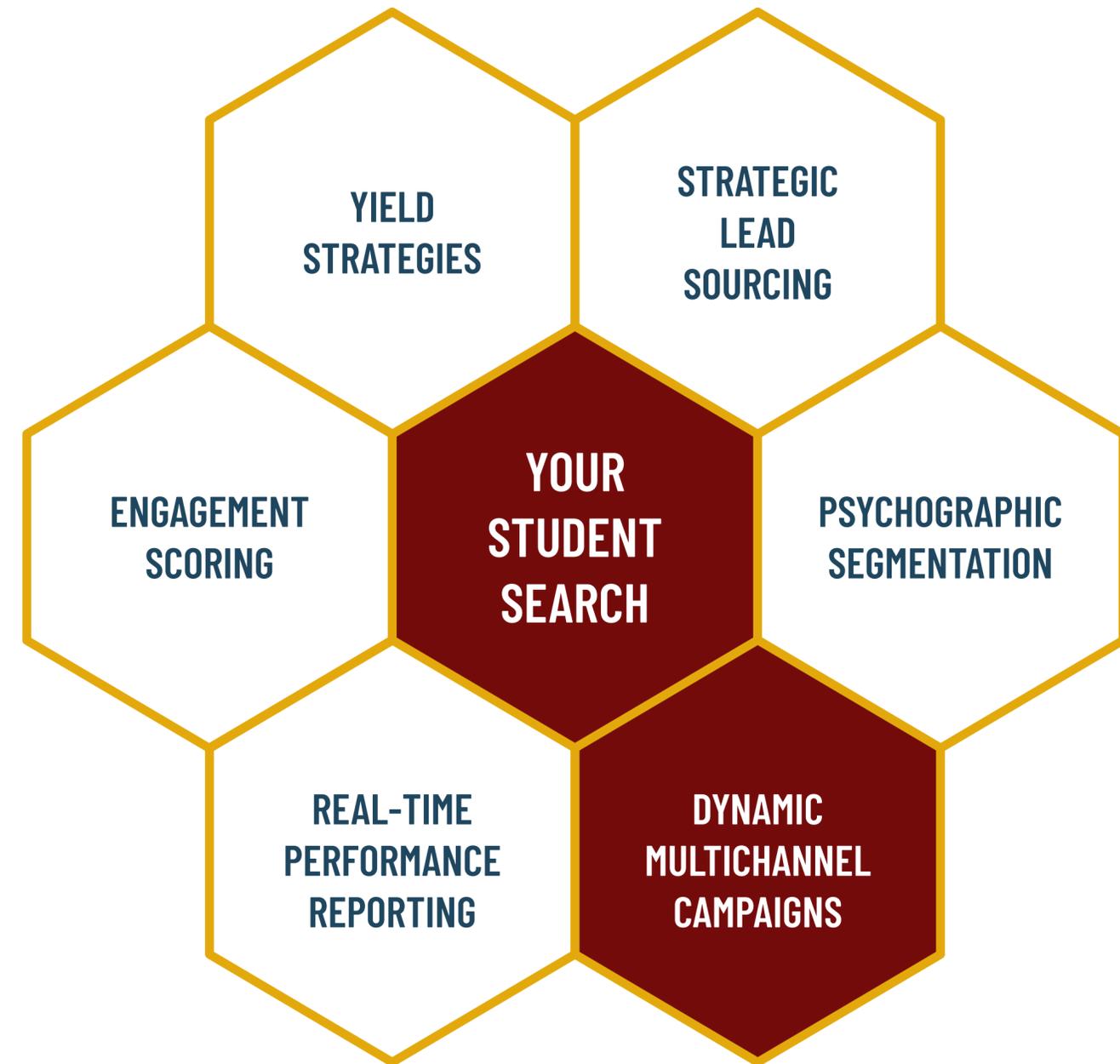
**+ *Data should be owned and available***
Gain a competitive edge with real-time reporting and automatic ownership of every record sourced.

**+ *Resources should be used efficiently***
Leverage predictive and actionable data sets to spend your time and money where it matters most.
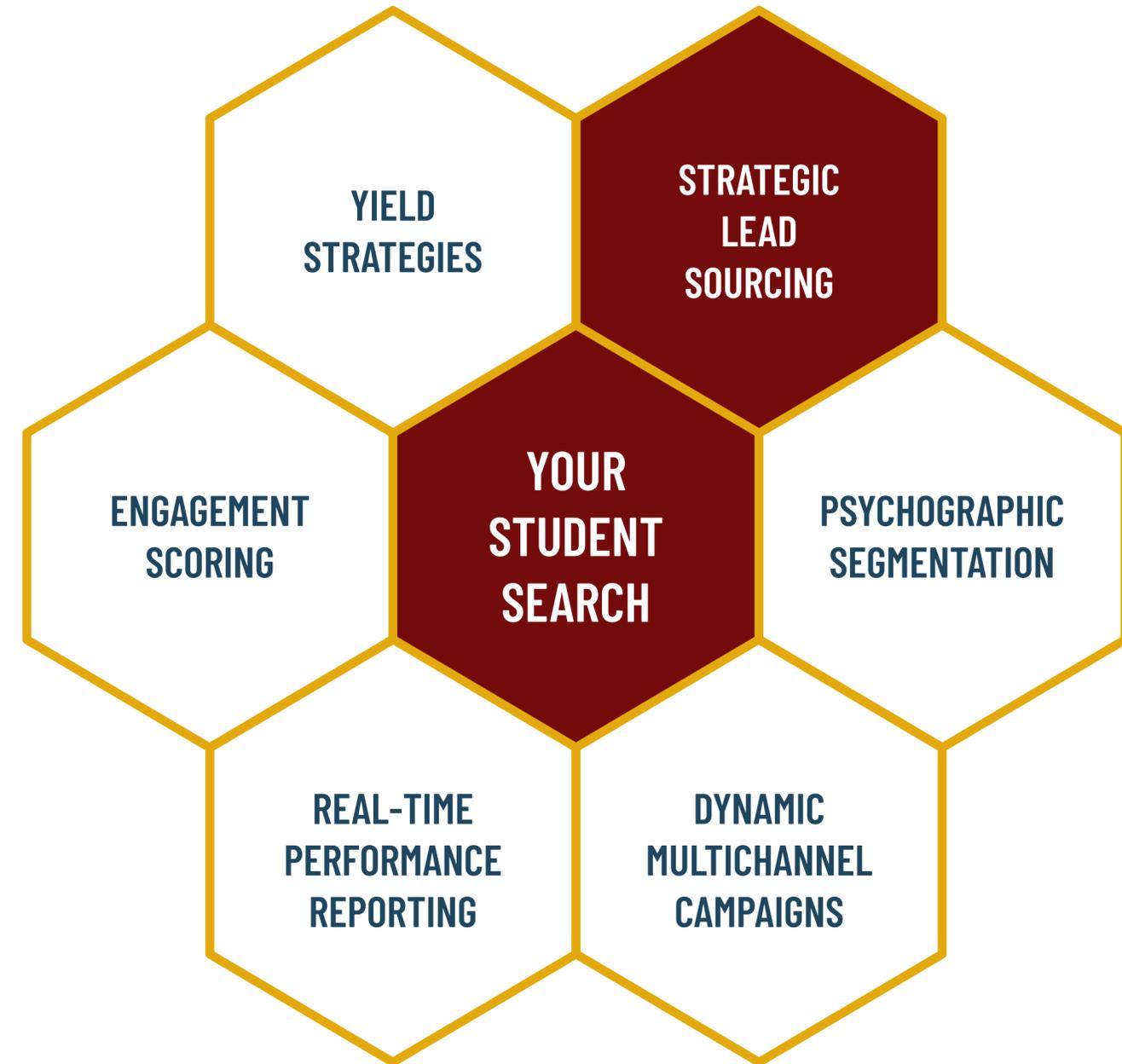
**+ *Your Student Search should be custom-crafted***
We'll build your solution together.

**+ *It's more than "Search"***
Achieve your enrollment goals by increasing engagement and conversions through our the student journey.
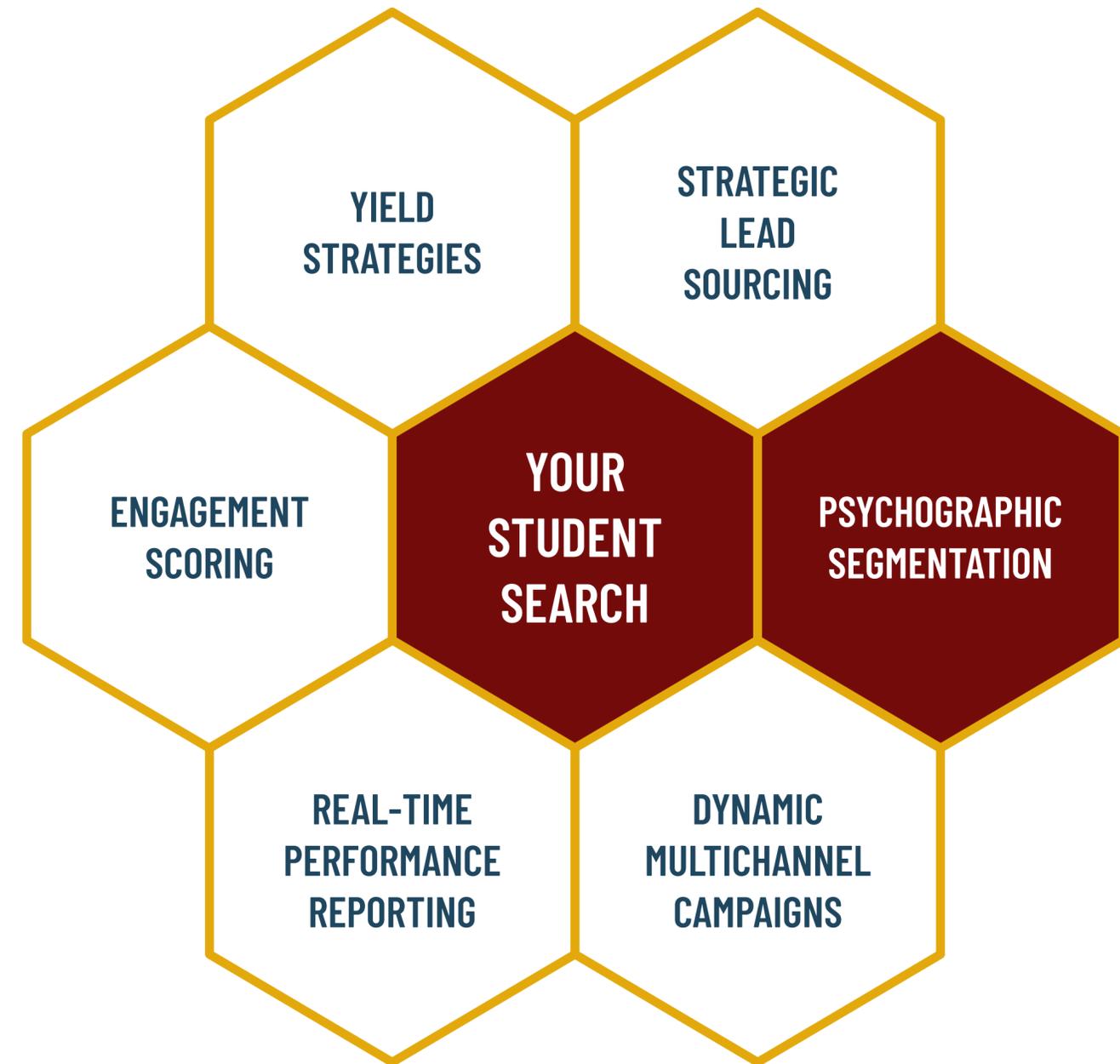
# Tip the Scale

Identify those with greater propensity to take action, by using market research and predictive modeling.

+ +
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# Use Personality to Personalize

Capture attention and build connections using personality, motivation, and beliefs data points.
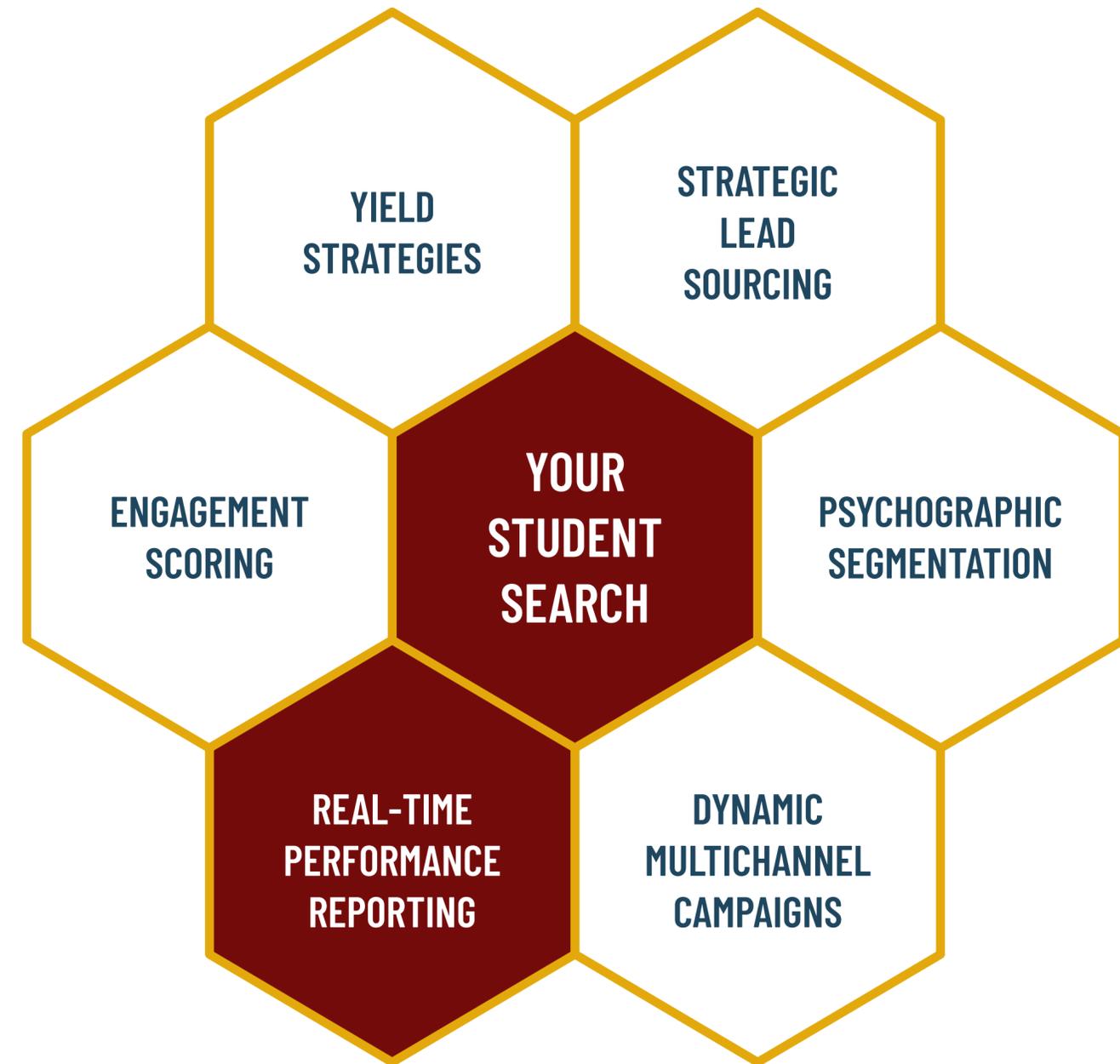


YIELD STRATEGIES

STRATEGIC LEAD SOURCING

ENGAGEMENT SCORING

YOUR STUDENT SEARCH

PSYCHOGRAPHIC SEGMENTATION

REAL-TIME PERFORMANCE REPORTING

DYNAMIC MULTICHANNEL CAMPAIGNS

+ +
+ +
+ +

# Campaigns should be agile

Drive engagement with precision digital advertising and dynamic email communications.



YIELD STRATEGIES

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PSYCHOGRAPHIC SEGMENTATION

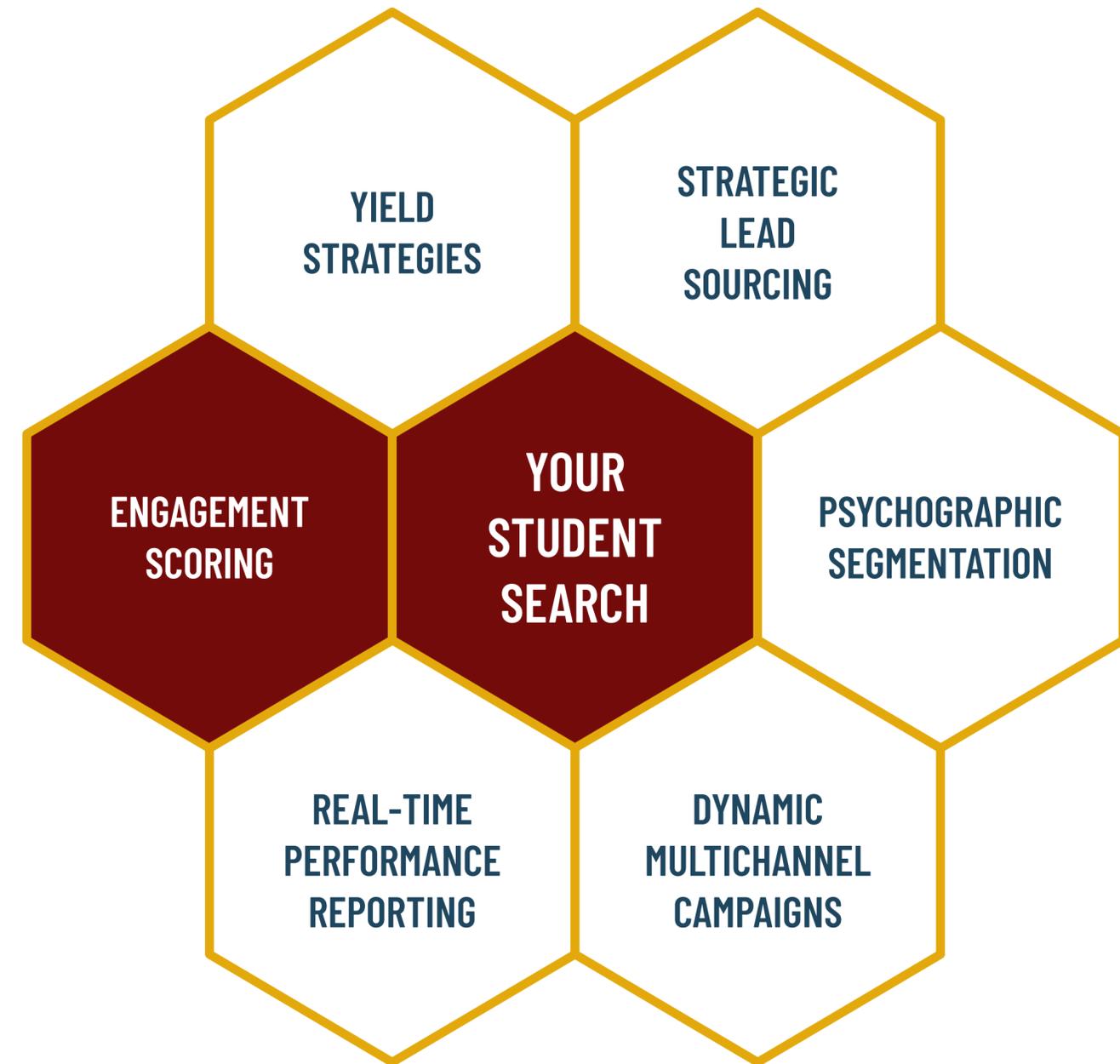REAL-TIME PERFORMANCE REPORTING

DYNAMIC MULTICHANNEL CAMPAIGNS

+ +
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# Data should be owned and available

Gain a competitive edge with real-time reporting and automatic ownership of every record sourced.



YIELD STRATEGIES

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# Resources should be used efficiently

Leverage predictive and actionable data sets to spend your time and money where it matters most.

YIELD STRATEGIES

STRATEGIC LEAD SOURCING

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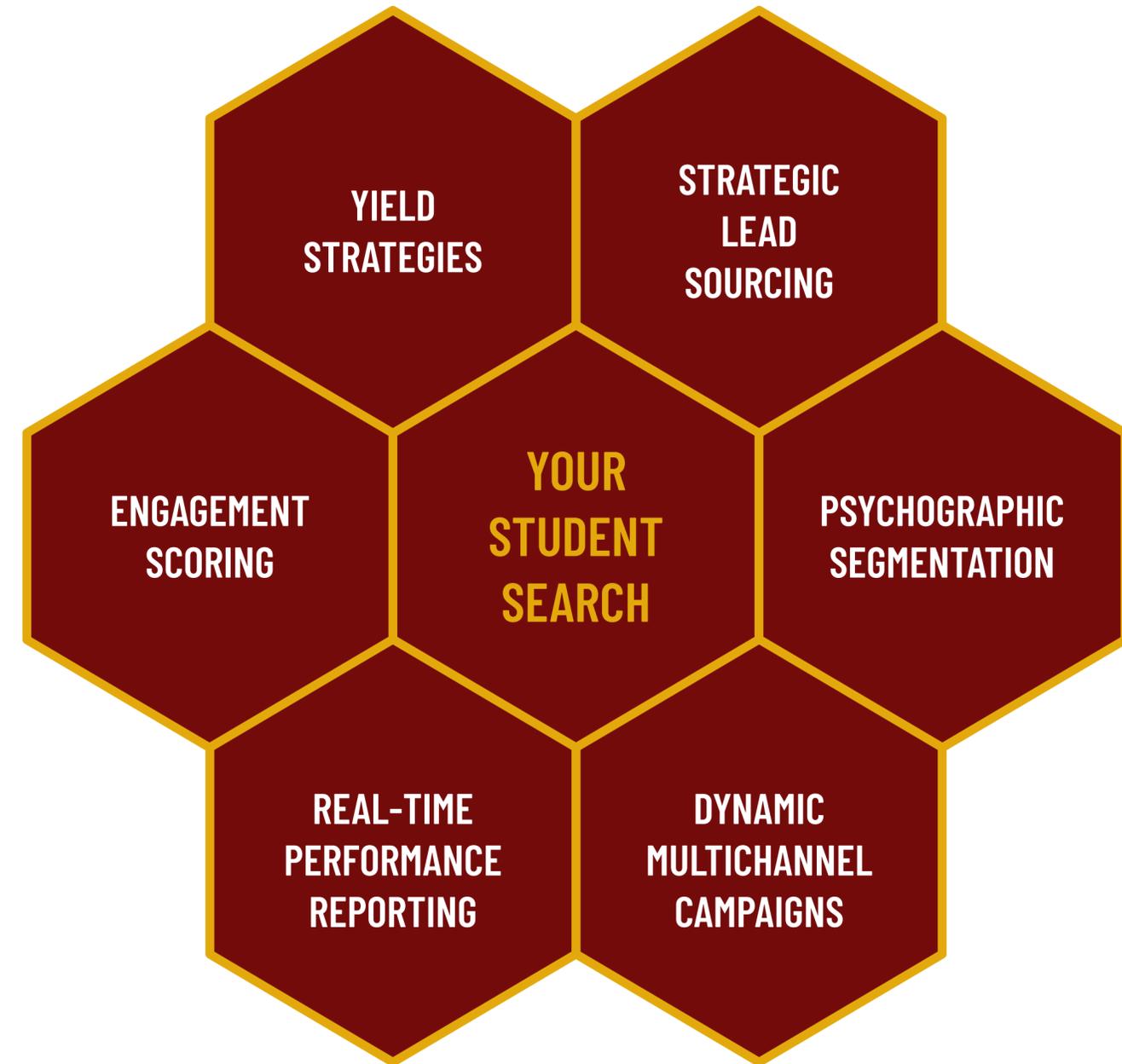REAL-TIME PERFORMANCE REPORTING

DYNAMIC MULTICHANNEL CAMPAIGNS

+ +
+ +  # It's more than "Search"
+ +

Achieve your enrollment goals by increasing engagement and conversions throughout the student journey.
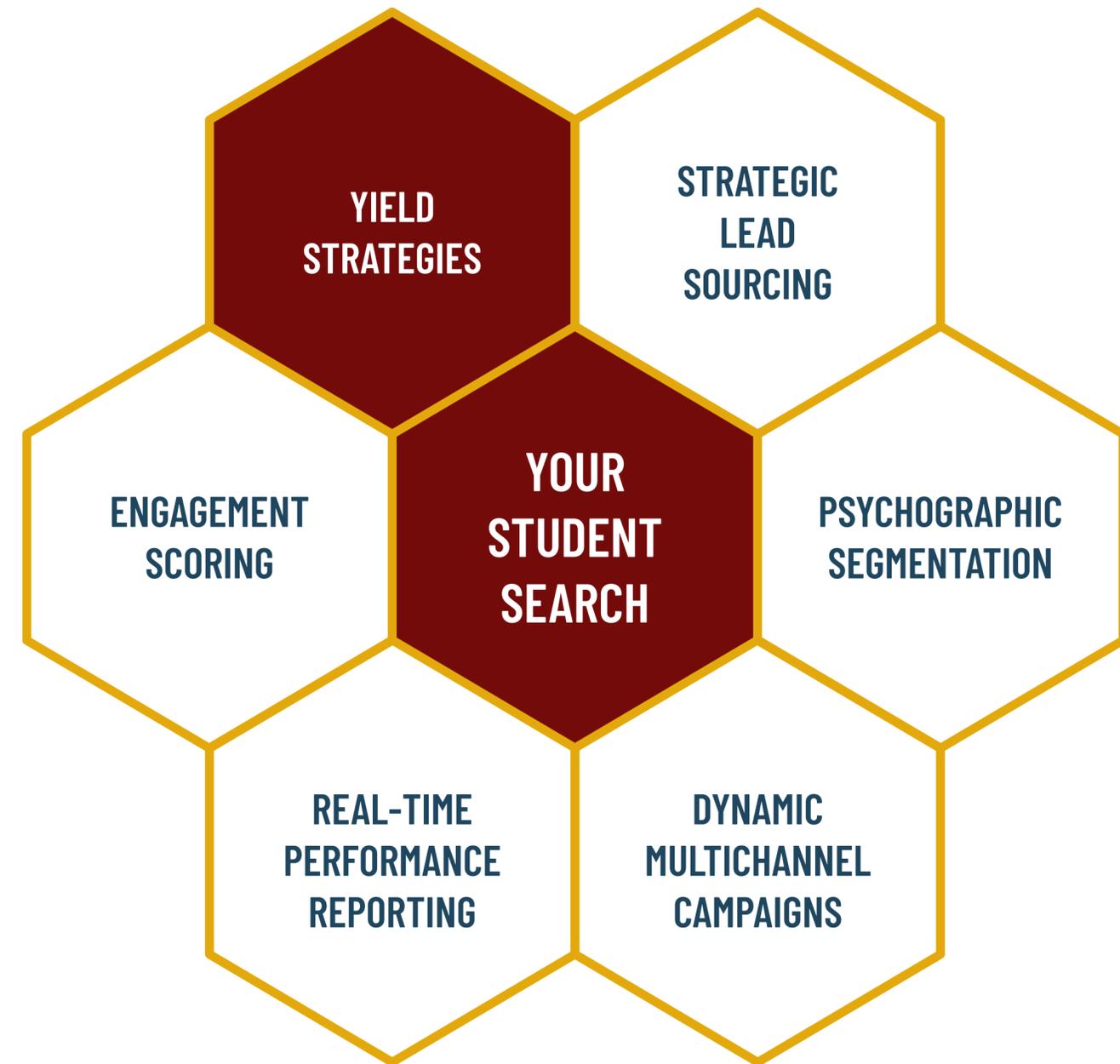
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# Custom-crafted

No institution is exactly like another. Your student search should be custom built to answer your most pressing enrollment needs.

YIELD STRATEGIES

STRATEGIC LEAD SOURCING

ENGAGEMENT SCORING

YOUR STUDENT SEARCH

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**Resources**

## Dive Deeper

[Adapting to Landscape Change in Student Search](#)

## Learn More

[Carnegie's Student Search](#)

## Explore

[Partner with Carnegie](#)

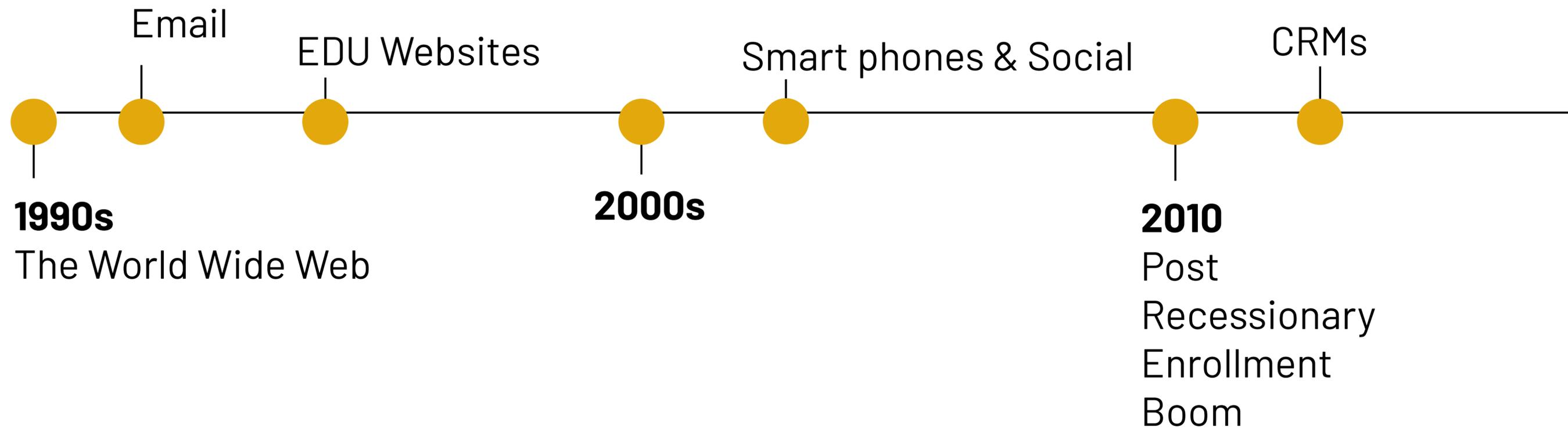info@carnegiehighered.com

tgilbert@carnegiehighered.com
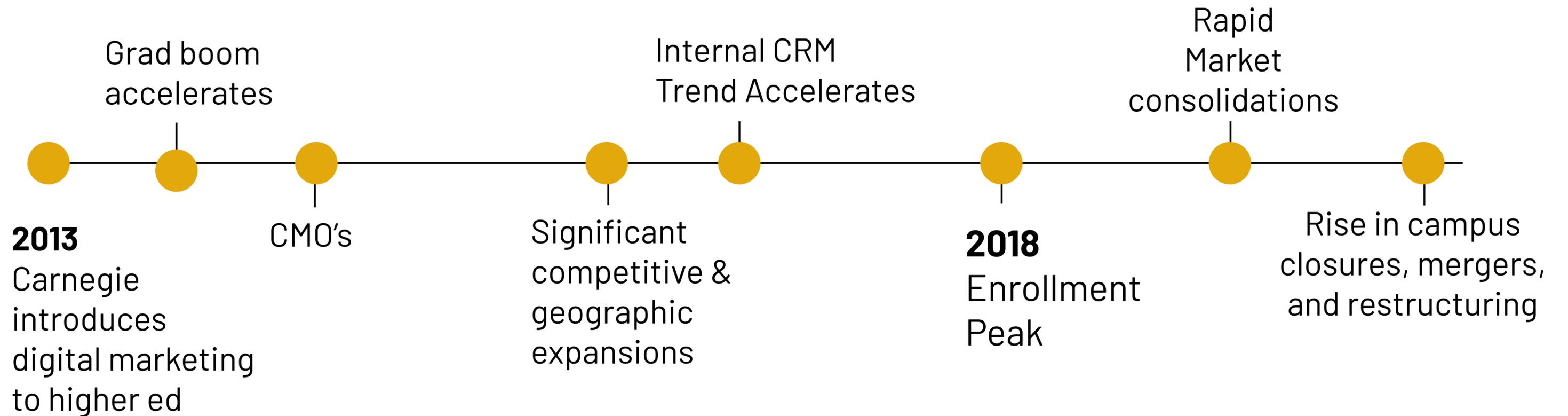
# CARNEGIE
## STUDENT SEARCH

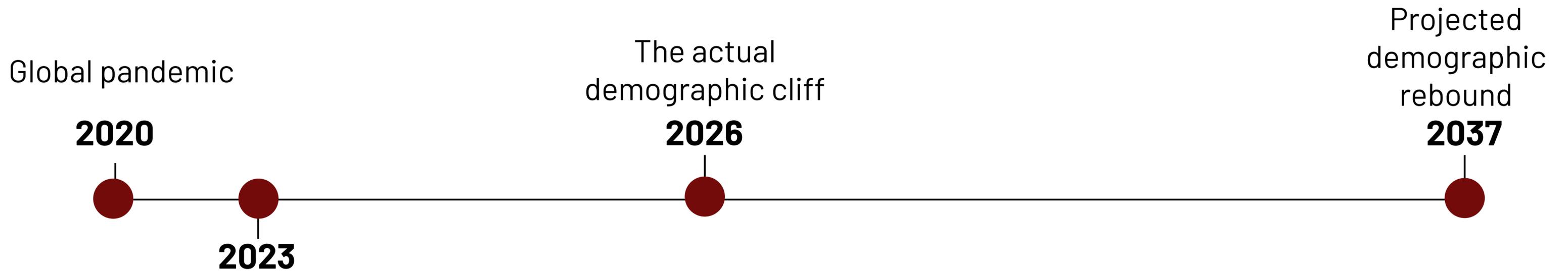carnegiehighered.com | info@carnegiehighered.com

END

# The Top of Funnel Era

Email

EDU Websites

Smart phones & Social

CRMs

**1990s**
The World Wide Web

**2000s**

**2010**
Post
Recessionary
Enrollment
Boom

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# The Growth Fracture

Grad boom accelerates

Internal CRM Trend Accelerates

Rapid Market consolidations

**2013** Carnegie introduces digital marketing to higher ed

CMO's

Significant competitive & geographic expansions

**2018** Enrollment Peak

Rise in campus closures, mergers, and restructuring

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# Pivot Period

Global pandemic

**2020**

**2023**

The actual
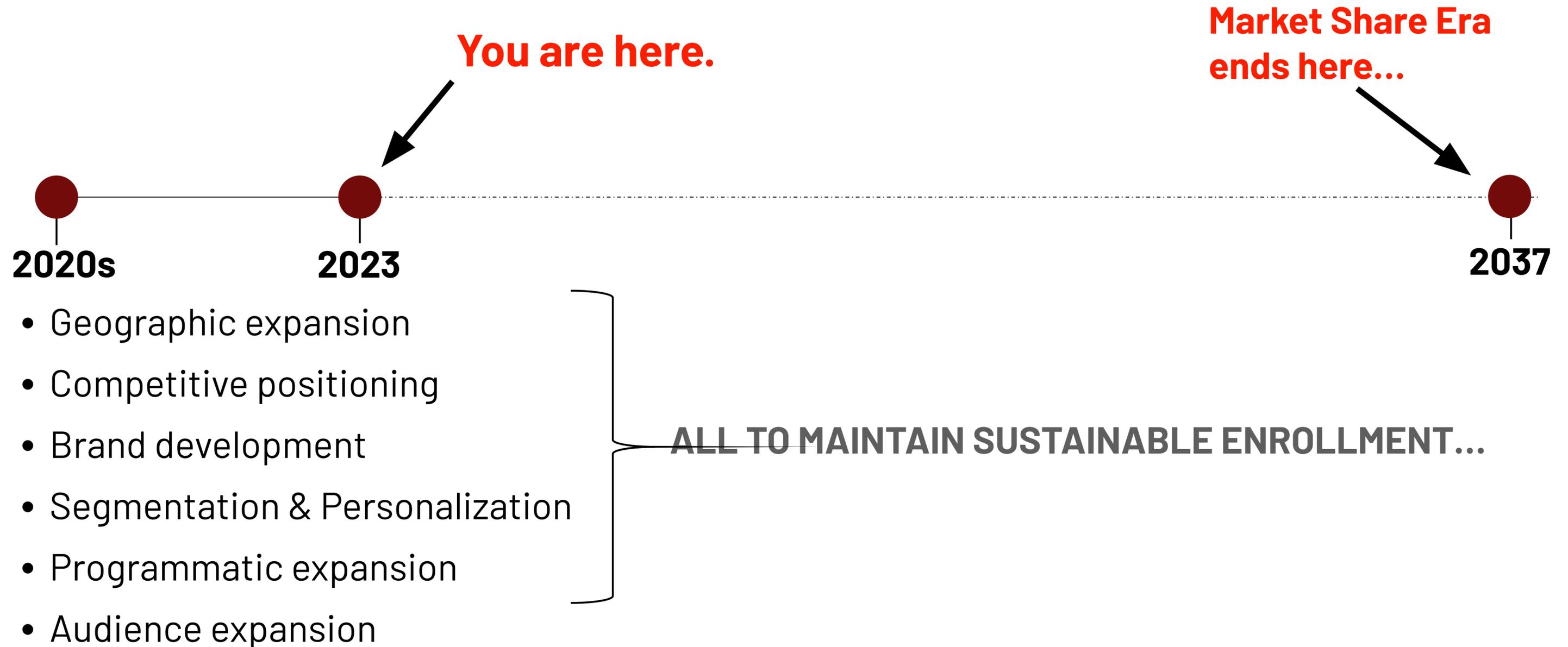demographic cliff

**2026**

Projected
demographic
rebound

**2037**

## Today's Market Realities

- Increased competition, demand compression
- Value shifts
- Data privacy laws and regulations, shifting data standards

- Multiplying technologies
- Higher interest rates
- Political, economic, and environmental uncertainties

# The market share era of higher ed enrollment

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**You are here.**

**Market Share Era ends here...**

2020s          2023                                              2037

- Geographic expansion
- Competitive positioning
- Brand development
- Segmentation & Personalization
- Programmatic expansion
- Audience expansion

**ALL TO MAINTAIN SUSTAINABLE ENROLLMENT...**

TREND #1:

# The Importance of 1ˢᵗ Party Data

Privacy Laws    Common Datasets    Direct Admit    Rich Data

SCOTUS

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TREND #2:

# More Regulation

Privacy Laws    FAFSA    SCOTUS    State-Level DEI

TREND #3:

# Values-based Purchasing Power

Increased Competition

Value of higher ed

Post-Pandemic Dynamics

New Market Exploration

TREND #4:

# The CXO +
# the Rise of Student Success

| Retention = Revenue | Customer Experience Mindset | Buyer's Market |
| --- | --- | --- |
| Addressing Complexity | Remarketing the Value | Creating Better Outcomes |

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TREND #5:

# Enrollment + Advancement Collaboration

Multichannel    Yield-Focused    Data Driven    Non-Linear    Year-Round

Marketing + Enrollment    Segmented    Personalized

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TREND #5:

# Year-Round Student Search

Multichannel   Yield-Focused   Rich Data   Multi-cycle   Non-Linear

Marketing + Enrollment   Segmented   Personalized

# A Summary Snapshot

There are fewer college-bound students.

Our dynamic with students has changed—we are no longer in control.

Engagement channels have multiplied.

The composition of college going students has changed.

Data privacy policies are limiting access to prospects.

Test-taking numbers are decreasing and are less representative of our population.

The student journey is less predictable.

Students are questioning the value of higher education.

Gen Z and Gen Alpha expect authenticity, buy along their values, and are the most digital-savvy generations yet.

Generational wealth transfer is going to radically shift fundraising as we know it.
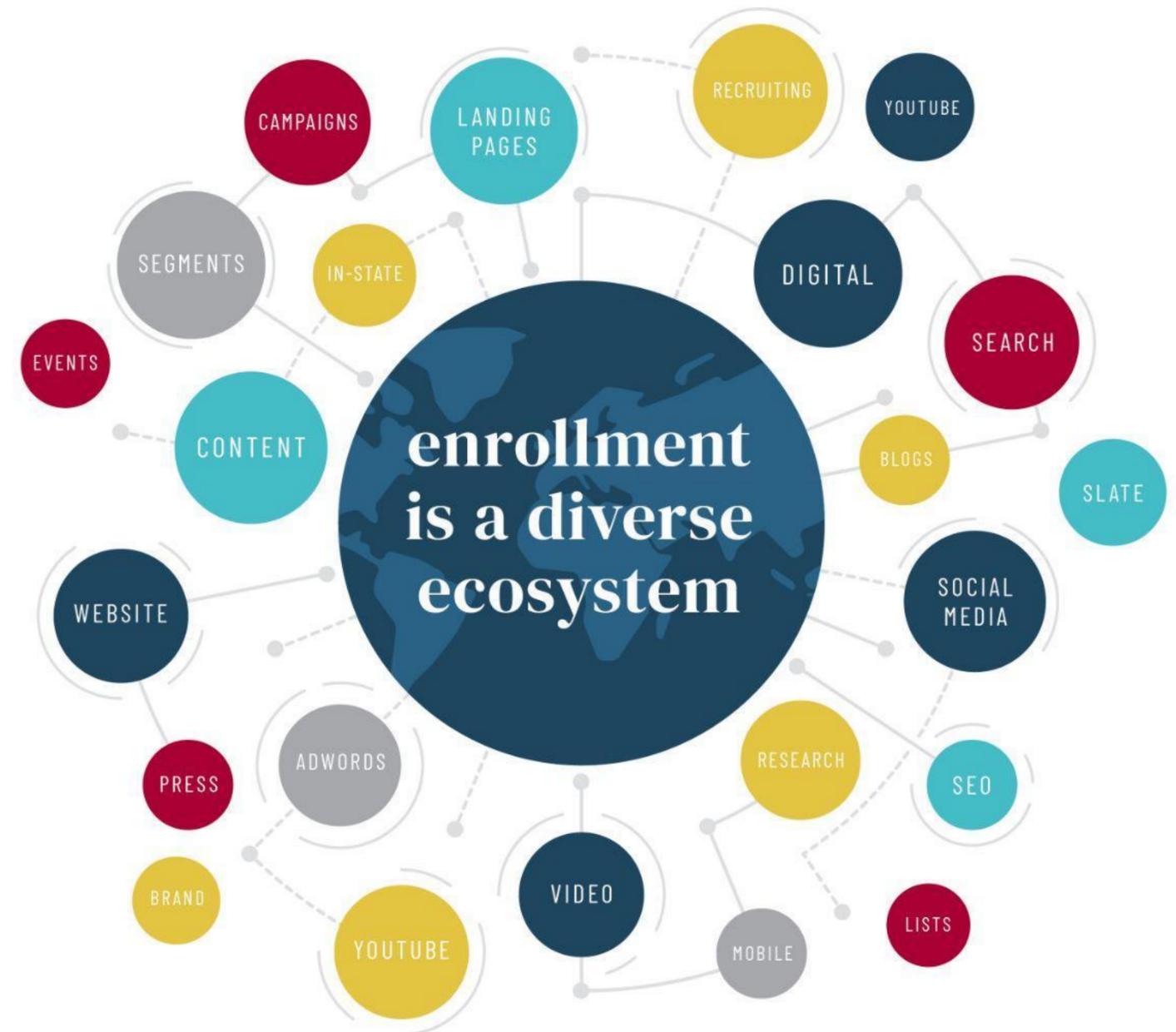
IT'S TIME
TO STAND
AND FIGHT

# 2020-2037 Funnel Strategy
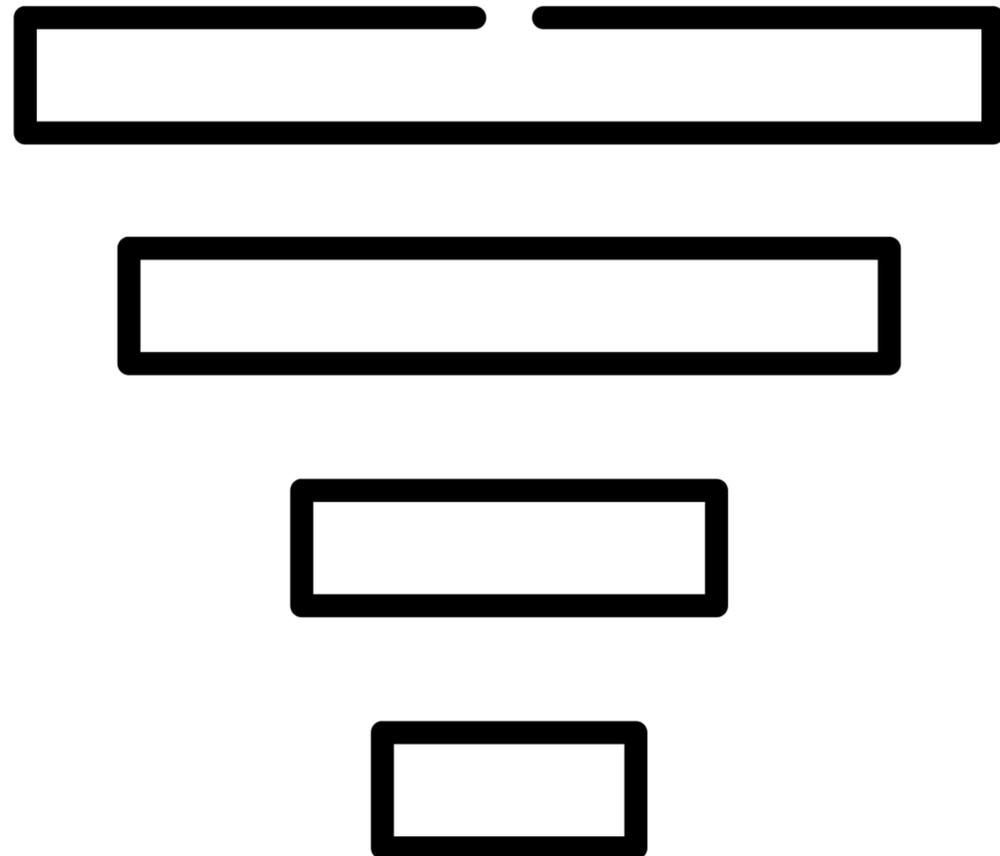
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Less Like This
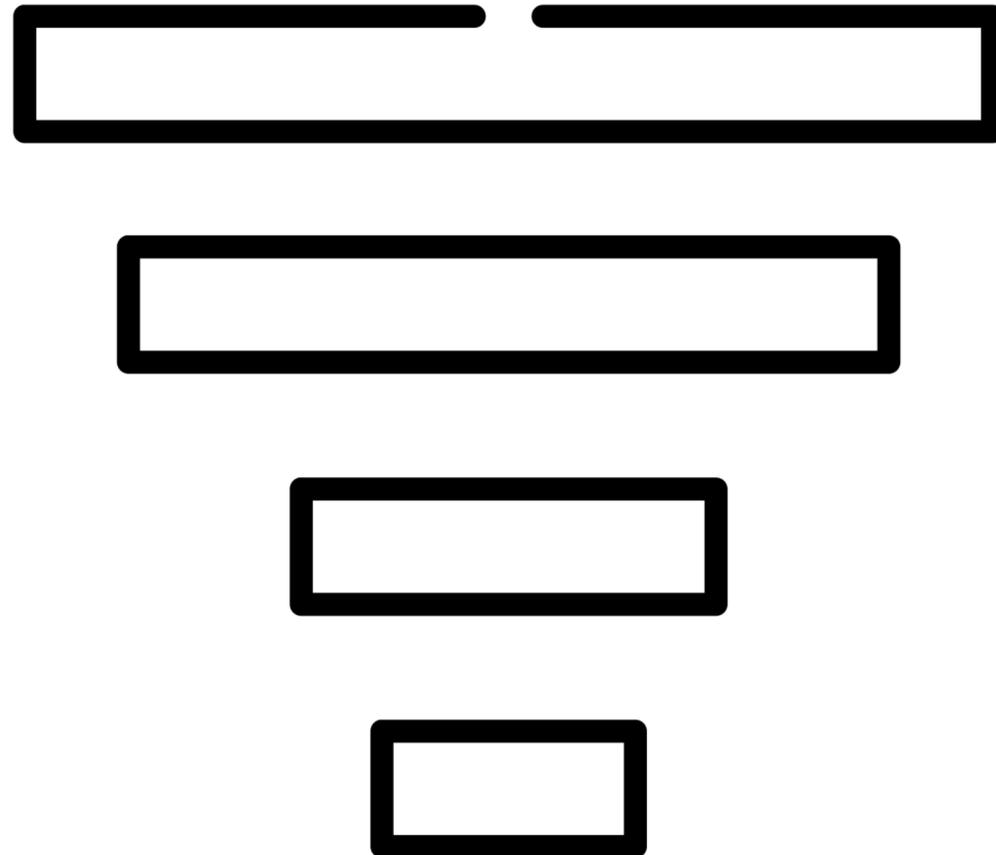
More Like This

# From Big-Top to Yield-Focused Strategy

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**2000-2019: APP-GEN PRIORITY**

**2020-2037: YIELD-FOCUSED PRIORITY**



OPPORTUNITY SPACE

OPPORTUNITY SPACE

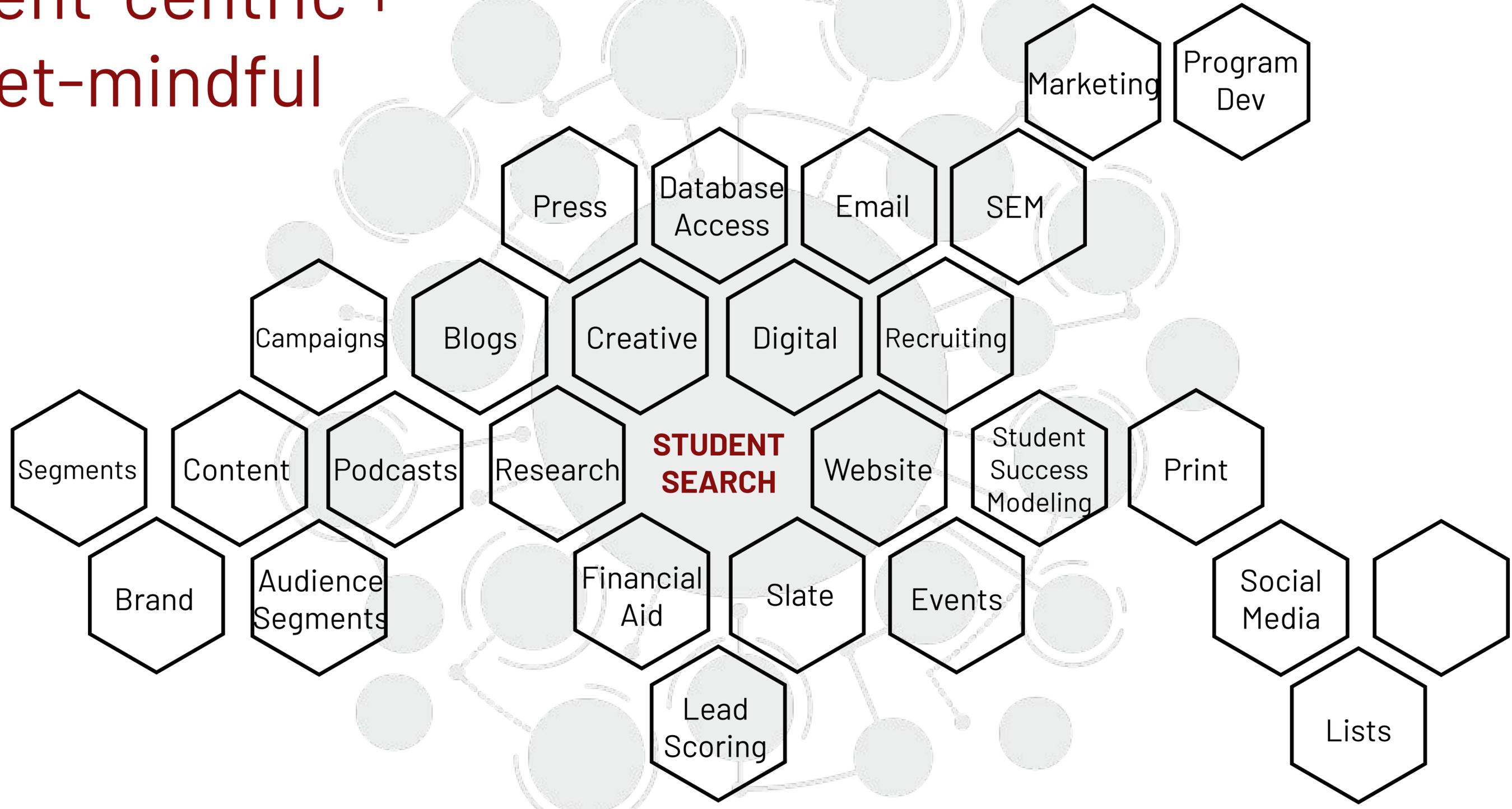OPPORTUNITY SPACE
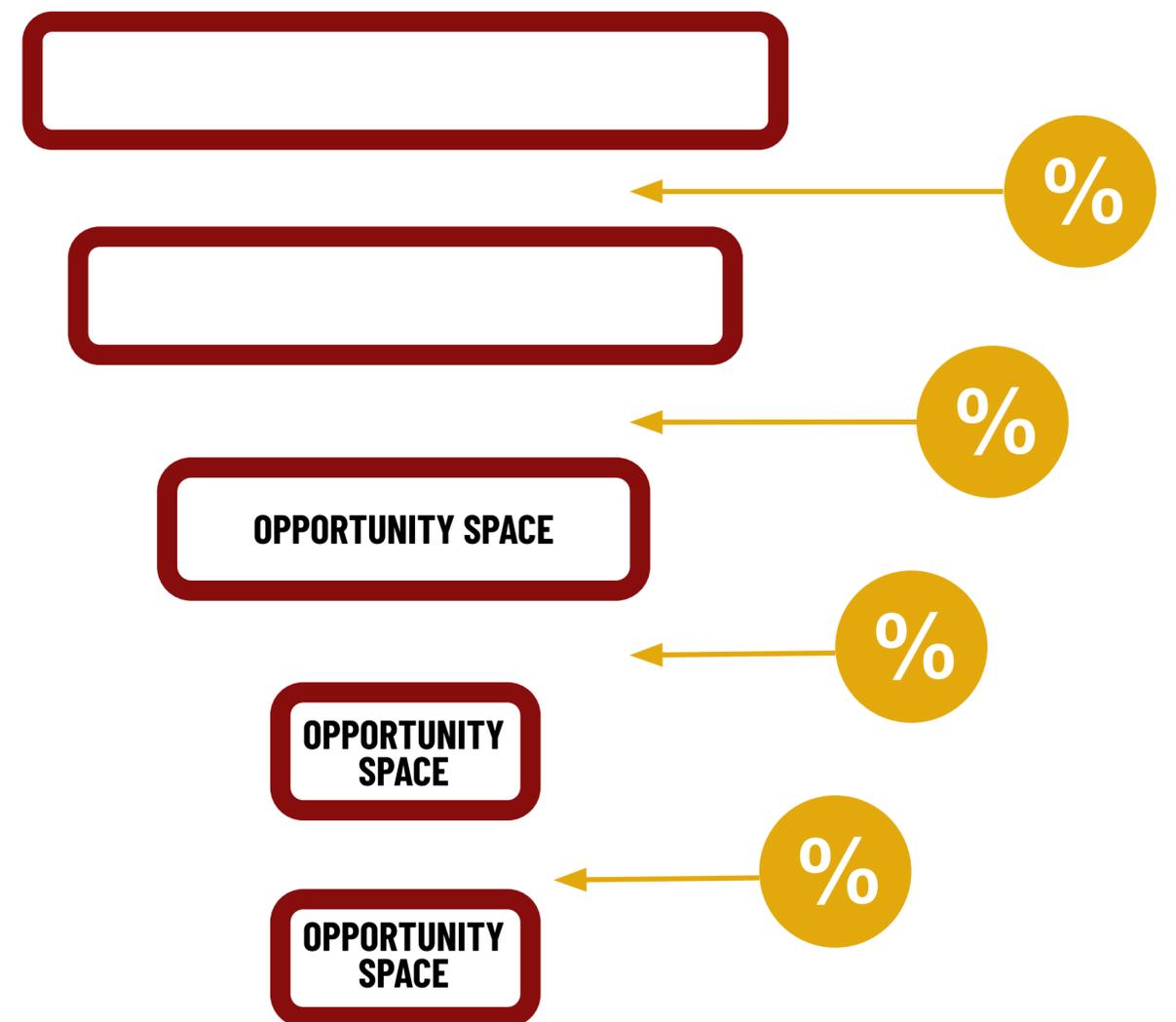
# Our Strategic Student Search Philosophies

- YIELD, YIELD, YIELD
- SEARCH SHOULD BE CLIENT OWNED
- MEET DIGITAL SAVVY WITH DIGITAL SAVVY
- AUTHENTICITY & PERSONALIZATION IS CRITICAL + PSYCHOMETRICS IS THE KEY
- STUDENT SEARCH IS YEAR ROUND
- RETENTION STARTS WITH RECRUITMENT

New Reality,
New Approach

Student-centric + Market-mindful

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Marketing · Program Dev

Press · Database Access · Email · SEM

Campaigns · Blogs · Creative · Digital · Recruiting

Segments · Content · Podcasts · Research · STUDENT SEARCH · Website · Student Success Modeling · Print

Brand · Audience Segments · Financial Aid · Slate · Events · Social Media · Lists

Lead Scoring

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YIELD +
RETENTION
STRATEGY

PROSPECT
ACQUISITION
STRATEGY

TARGETED
DIGITAL
MARKETING

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STUDENT
SEARCH

IN-HOUSE
SLATE CRM
EXECUTION

PERSONALIZED
CREATIVE

PSYCHOGRAPHIC
SEGMENTATION

**Responsive.
Relevant.
Optimized.
Owned.**

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IN-HOUSE SLATE CRM EXECUTION

MAXIMIZE YOUR CRM INVESTMENT, SAVE, AND REINVEST WISELY.

+ Campaign Set Up
+ Data Transparency
+ Fully Supported
+ Prospect to Inquiry or Full Lifecycle Communications

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## TARGETED DIGITAL MARKETING

## DELIVER THE RIGHT MESSAGE TO YOUR STUDENT SEARCH AUDIENCE AT PRECISELY THE RIGHT TIME.

+ Industry Leading Digital Execution
+ Precise Targeting
+ Unified Brand Experience
+ Integrate Slate landing pages for Real-time Tracking
+ List-based and/or Full-lifecycle Strategies

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YIELD + RETENTION STRATEGY

MAXIMIZE YOUR RESOURCES, OPTIMIZE CONVERSIONS AND INCREASE YIELD AND RETENTION.

+ Lead Scoring
+ Individualized Financial Aid Modeling
+ Student Success Modeling
+ Operational Excellence Audits
+ Strategic Enrollment Consulting