



enroll<sup>360</sup>  
by EAB

# Gen Z's Evolving Enrollment Journey

Lessons from EAB's 2022 New College  
Freshman Survey and Behavioral Data Sets





# Executive Summary

## It's Essential to Keep Up with an Ever-Changing Student Journey

Change has been one of the few constants of Gen Z's journey to college. Social distancing transformed their high school experience and accelerated their adoption of digital sources in recruitment. At the same time, attitudes about testing shifted, and skepticism toward the value of college continues to mount. Despite the rapid pace of change since 2020, the lasting impacts of the pandemic remain to be seen. And amid all this change and uncertainty, competition for students has continued to grow, meaning that it's critically important—and extremely difficult—for enrollment leaders to adopt student-savvy and nimble practices to meet the needs of today's students.

To help enrollment leaders navigate this complex terrain, EAB conducts ongoing research into Gen Z's behaviors and preferences.

**This report explores five lessons on Gen Z's evolving journey based on our latest student survey and behavioral data.**

## Our Methodology: Student-Reported and Observational Data



**New College Freshman  
Survey Responses**

**4,848**

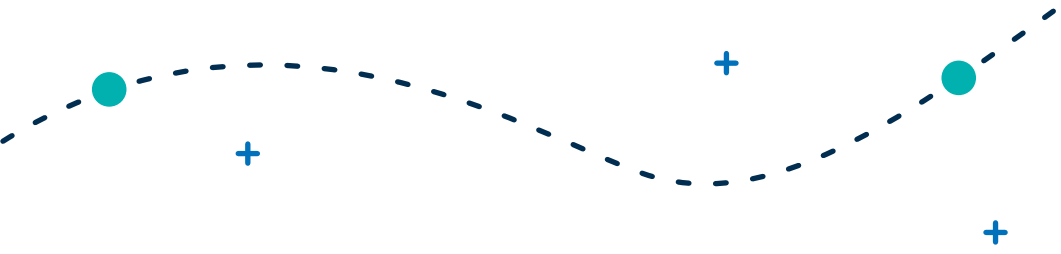
High school students who graduated in 2021, with data collected in winter 2022



**Observed Student  
Behavioral Data**

**1.5B+**

Student interactions that EAB analyzes annually from across our partner institutions



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LESSON 1

**Gen Z relies heavily  
on self-service tools in  
their college search.**

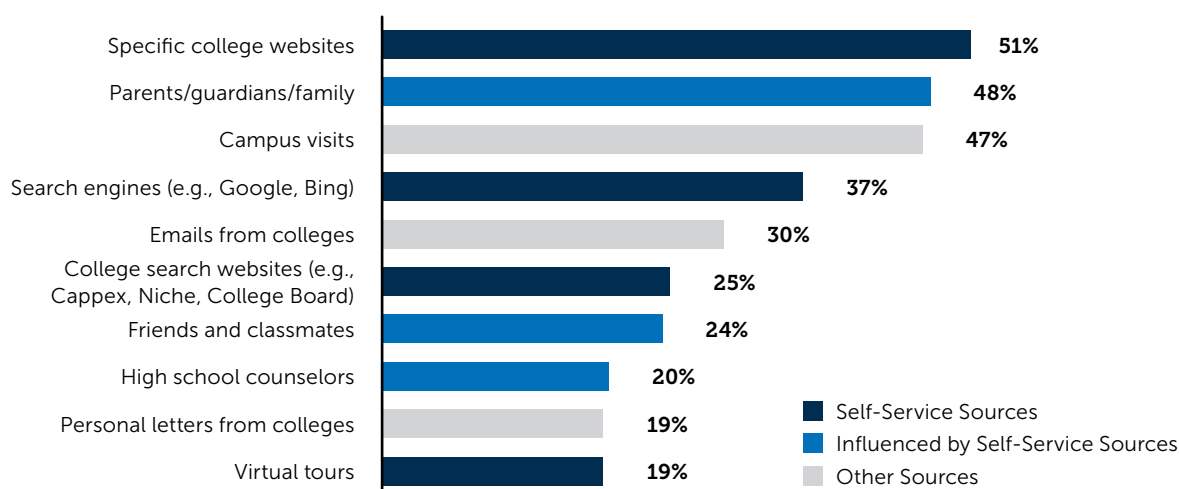
# Gen Z's Top Sources of Information

## Self-Directed Research Is Crucial to the Enrollment Decision

When students are deciding which college they'll attend, your institution's website is their go-to source. In addition to your site, they also rank several other self-service sources as highly influential in their decision, including search engines; college search websites such as Cappex, Niche, and College Board; and virtual tours. Our analysis indicates that Gen Z prefers to research on their own schedule, meaning that it's critical for institutions to have a strong web presence. It's also worth noting that self-service digital sources are an excellent way to influence students' #2 go-to source: their parents and family. In addition to naming self-directed sources and parents, students also identified campus visits, emails from colleges, friends, high school counselors, and personal letters from colleges as top sources of information.

### "What sources of information did you rely on most to make your enrollment decision?"

*Top 10 Sources from a List of 31; Participants Could Pick Up to 5*



### TAKEAWAY

Your website, search engine optimization, and presence on college search websites play a central role in how students and families will assess your institution.

# The Rise of “From-Home” Sources

## Remote Sources Gained Importance During the Pandemic

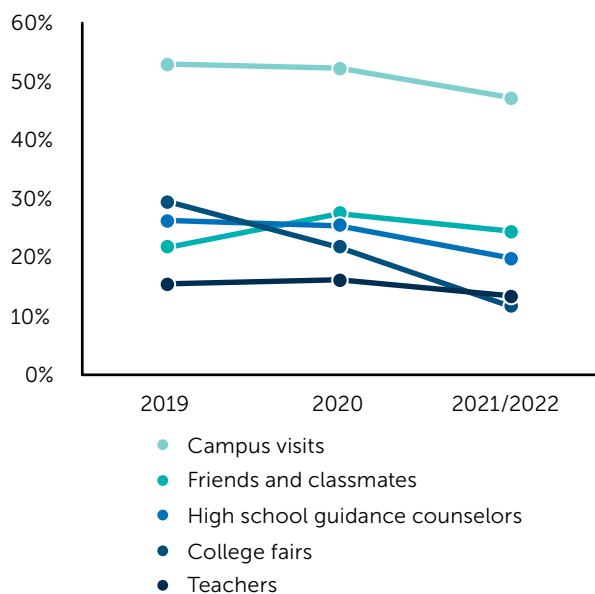
Because students spent more time at home during periods of social distancing, they had less access to many of the sources that traditionally informed recruitment decisions, including campus visits, friends and classmates, high school counselors, college fairs, and teachers, all of which decreased in influence. Our research shows that sources that students could easily access at home all grew in importance during the pandemic, including parents, email, personal letters, social media, and video.

## Don't Underestimate the Power of Email and Paper Mail

The uptick in student engagement with email and personal letters is supported by EAB marketing data showing that these sources remain effective communication channels, counter to pronouncements about “the death of email.” Partner marketing data for the fall 2022 cycle shows a 21% lift in response rate for students who received paper mail and email compared to email alone.

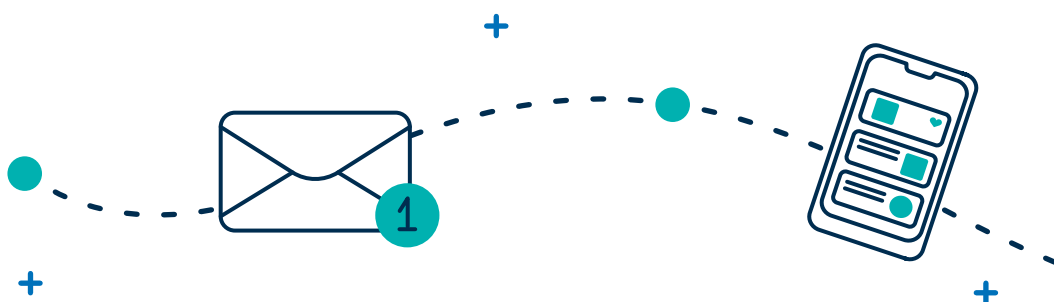
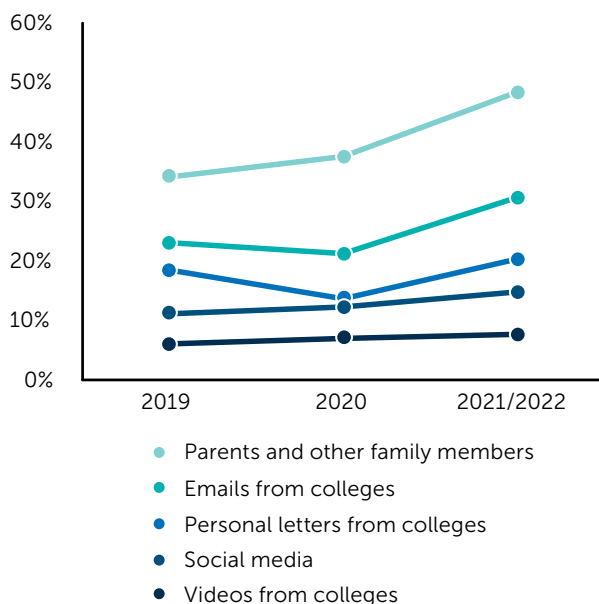
### Trends in In-Person Sources

*Percentage of Students Saying They Relied Heavily on a Resource, 2019-2022*



### Trends in “From-Home” Sources

*Percentage of Students Saying They Relied Heavily on a Resource, 2019-2022*



# Virtual Tours Are Now a Standard Feature of the Journey

## Virtual Tours Appeal to Gen Z's Desire for Self-Service Tools

Campus shutdowns and reduced travel accelerated Gen Z's adoption of virtual tours, helping virtual tours become a staple of today's recruitment experience. Whereas in our 2020 New College Freshman Survey, less than half had attended a virtual tour, by our 2021/2022 survey, 75% had done the same. Even with a strong return to in-campus visits, we expect virtual tours to continue to play a central role in Gen Z's college search since they cater to students' desire for self-directed, flexible, and easily accessible sources.

## Virtual Tours Expand Access for Lower-Income Students

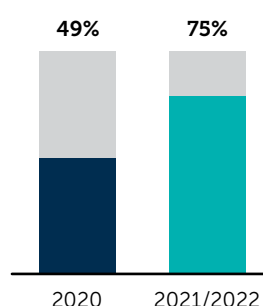
Our research supports one of the commonly cited benefits of virtual tours: they help improve access to campus for students who may not have the resources or flexibility to visit in person. Students with family incomes of more than \$120,000 per year were 83% more likely to have visited more than three schools in person than families making \$60,000 or less. By contrast, with virtual tours, the gap in usage across income groups shrinks to 56%. While it's encouraging that virtual tours help level the playing field, our data indicates that some disparity remains, suggesting that schools would likely benefit from further promotion of their virtual tours to lower-income students.

### TAKEAWAY

Appeal to students' preference for self-service tools with a virtual tour that lets students navigate to the places that interest them most.

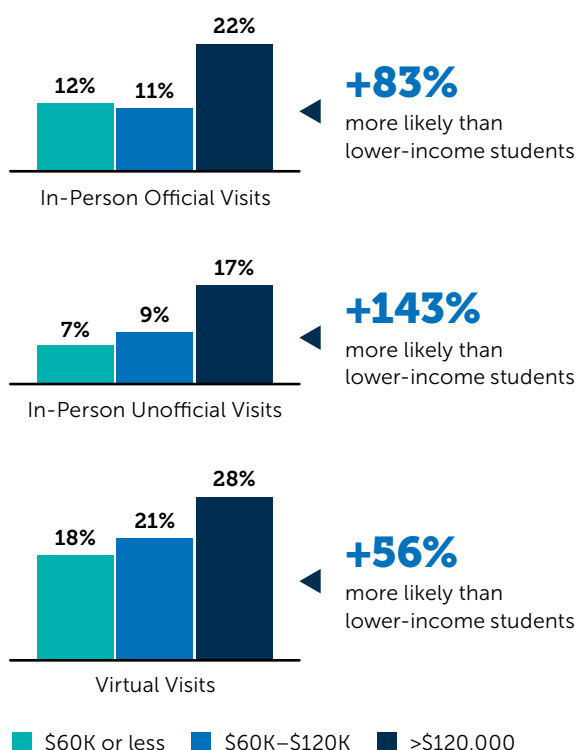
## A Surge in Virtual Tour Usage

*Share of Students Attending at Least One Virtual Tour*



## Visit Behavior by Family Income

*Students Who Went on >3 Visits*







## LESSON 2

**Parents play a more  
vital role than ever.**

# Parents Are Highly Influential

## A Growing Role in Students' Journey

Not only are parents and families a highly important source of information in students' college search, second only to college websites, but they've also become more influential over the past several years. Since 2019, the percentage of students naming parents and families in their top five sources has grown consistently, with a big jump in influence in our 2021/2022 survey. With students spending more time at home with families during the pandemic and less time at schools interacting with teachers and counselors, it's not surprising that parents played a larger role in 2021 than ever before.

While it remains to be seen whether parental influence will stay at pandemic-era levels, it's important to note that parents will likely remain instrumental to students' search process. To build affinity with that key group, enrollment leaders should aim to have robust parent communication channels through email streams and digital ads. In addition, institutions should keep in mind that many of the top sources listed by students, such as personal letters and campus visits, are also effective channels for reaching and influencing parents.

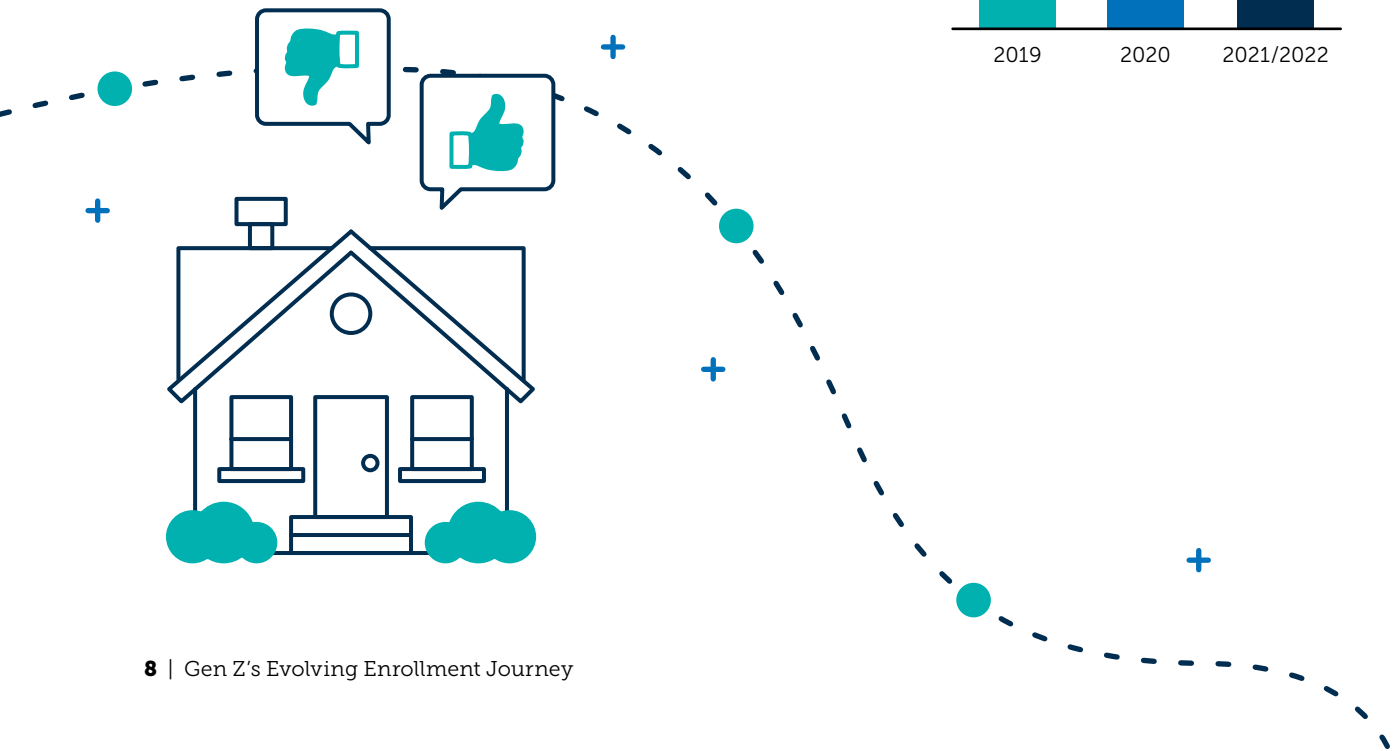
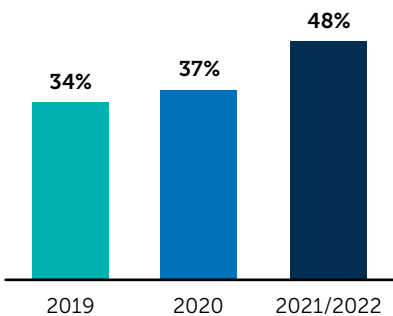
### Parent Engagement Is a Strong Indicator of Student Behavior

**50%**

increase in likelihood of a student to apply if their parent had responded to an EAB parent marketing campaign

### Parental Influence Has Increased

*Percentage of Students Naming Parents or Guardians in Their Top 5 Sources*



# Demographic Differences in Parental Influence

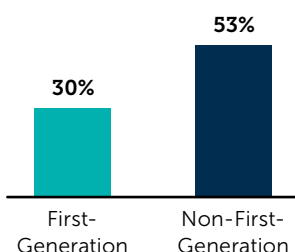
## Historically Underserved Students and Female Students Are Less Likely to Rely on Parents

Our research indicates that parents' level of influence varies across different demographic segments. Lower-income students are less likely to rely on parental support than higher-income students, as are Black or Hispanic students compared to Asian or White students. We also found that first-generation students are far less likely to name their parents as a top source for college information than their non-first-generation peers.

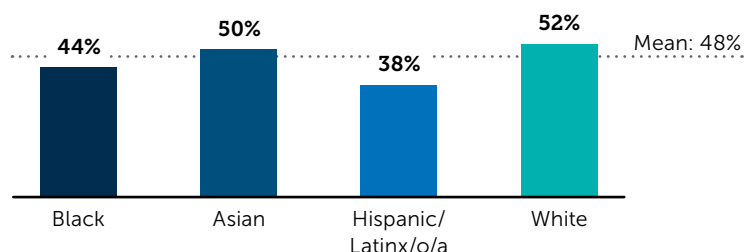
In addition, female students are somewhat less likely to rely on their parents than male students are. They are also more likely than their male counterparts to use self-service resources, including search engines, college search websites, and virtual tours, suggesting that they may be taking a more self-driven approach to their search than male students do.

## Percentage of Students Naming Parents or Guardians in Their Top 5 Sources

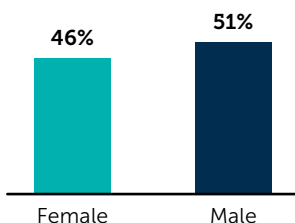
*Findings by First-Generation Status*



*Findings by Race/Ethnicity*



*Findings by Gender*



## Female Students Are More Likely to Use Self-Directed Sources

	Female	Male
Search engines	38%	34%
College search websites	28%	22%
Virtual tours	22%	16%

### TAKEAWAY

While parent influence differs somewhat by student segment, parents are highly influential across all groups. Ensure that your institution has built multichannel parent communication streams not just for seniors but also for juniors and sophomores. Early parent communication streams can help you lay the foundation for a constructive relationship with key recruitment influencers.

----- “ -----

I didn't end up applying  
to my first choice because  
their application was  
more complex than any  
other school's."

CURRENT COLLEGE FRESHMAN





## LESSON 3

**Competition for  
students' attention and  
interest is intensifying.**



# An Uptick in Competition Across the Funnel

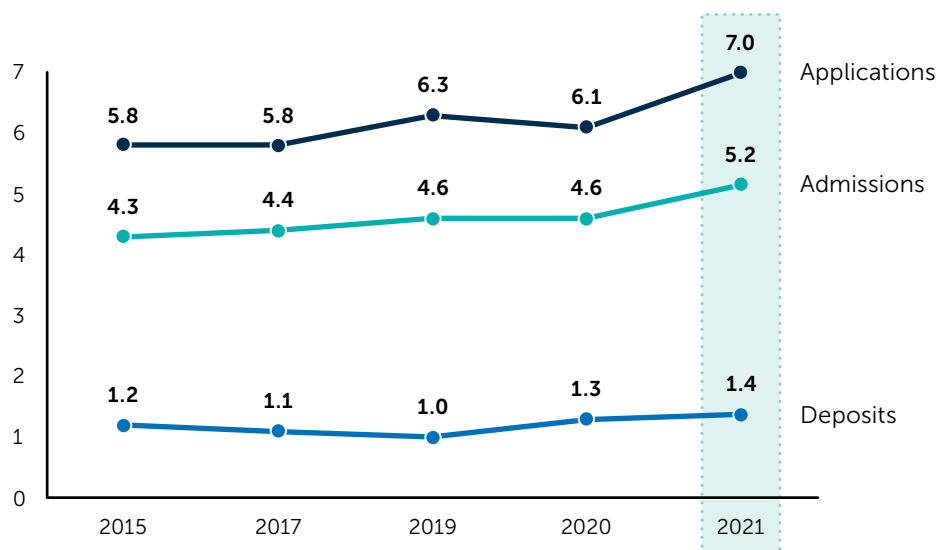
## Students Are Applying to an Average of 7 Institutions

Over the past several years, data from EAB student surveys and our partner institutions has shown a steady increase in the average number of applications per student. Even so, we saw a large jump during the pandemic, with the average number of applications per student climbing from just over 6 to 7. This corresponded to an average of more than 5 admissions per students and 1.4 deposits per student.

Today's prospects are considering a wider set of institutions at every stage of the funnel. For enrollment leaders, this means that students' attention is increasingly divided at each stage of their journey and that a deposit no longer necessarily represents a student's final decision.

## Average Applications, Admissions, and Deposits per Student

*EAB New College Freshman Survey Data, 2015–2021*



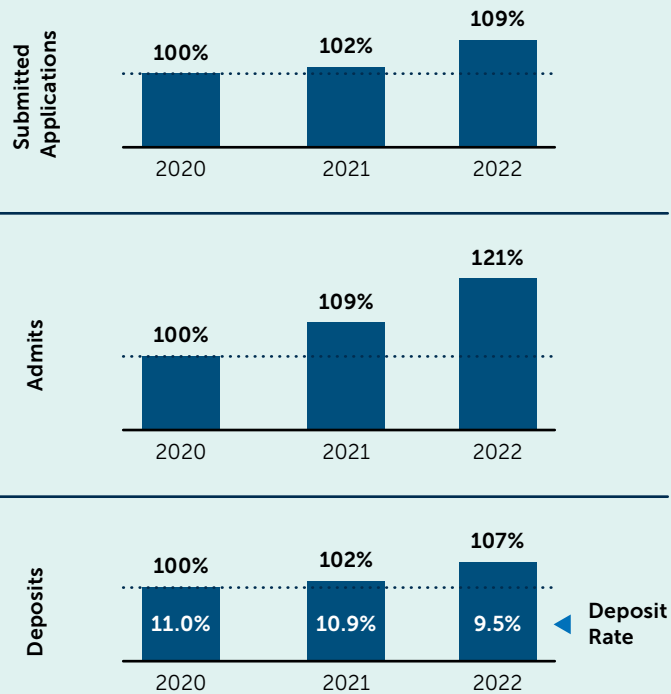
### TAKEAWAY

With competition heating up across the funnel, it's important to ensure your communication reaches and resonates. Personalized marketing can help you build and deepen connections with students by delivering the right message, at the right time, through the right channel.

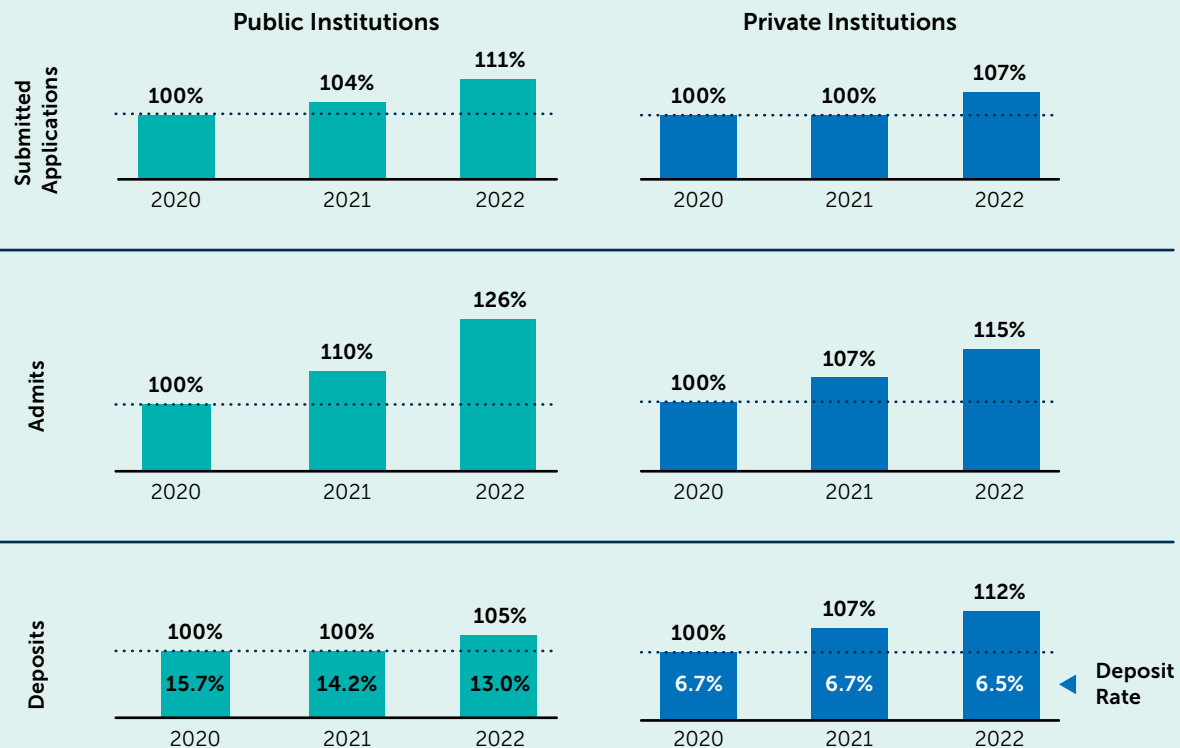
## Application, Admit, and Deposit Activity

Data from 192 EAB Partner Institutions, Indexed Relative to 2020<sup>1</sup>

### OVERALL



### BY SECTOR



1. As of April 2022

# Visit Incentives Are Appealing



## Scholarship “Bonuses” Are a Powerful Draw to Campus

Visit incentives can be an effective way to win students’ attention and deepen their affinity for your school by encouraging them to envision their future on your campus. Our survey found that visit incentives are generally very attractive to students, with 64% saying that they’d be encouraged to see a campus if the school offered a \$1,000 scholarship “bonus” for students who later enrolled there. EAB research indicates that institutions who offer such programs often do so in the form of a gap scholarship. One advantage of the scholarship bonus option is that, unlike with other incentive programs, your institution will spend resources only on the students who eventually enroll.

In addition to the scholarship incentive, students also found many other offers appealing, with more than a third saying they’d be encouraged to see a campus if they received school apparel, a \$100 gift card unrelated to the college, or funds to cover travel costs. It’s worth noting that students say they’d be more encouraged by school apparel, a relatively inexpensive option, than by travel reimbursements. Our research also indicated that, perhaps counterintuitively, travel reimbursements were not necessarily most appealing to lower-income students.

### TAKEAWAY

Consider adding a visit incentive, such as a “bonus” scholarship, if your institution doesn’t do so already. If visiting students receive apparel or other swag, promote your giveaway in your marketing.

“Which of the following incentives, if any, would encourage you to visit a college you are interested in?”

*A clear winner, with relatively lower financial risk to your institution*

**64%** \$1,000 scholarship “bonus” to the school

**39%** School apparel (e.g., T-shirt, hat, bag)

**39%** \$100 gift card (e.g., gas card, Amazon, iTunes)

**38%** Fly-in programs (travel paid by college)

**38%** \$250 travel reimbursement

**25%** \$100 gift card to campus bookstore

**24%** Opportunity to shadow a student

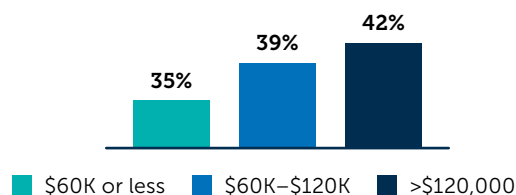
**20%** Meeting with a professor

**19%** Free meal on campus

**11%** I don’t need an incentive to visit

## Financial Incentives Not Necessarily a Targeted Tool for Lower-Income Students

*Students Reporting Interest in a \$250 Travel Reimbursement*



# Testing Policy Influences College Choice

## Test-Optional Affects Historically Underserved Groups Most

Another major factor that impacts students' choice of school is testing policy. While the shift to test-optional was one of necessity for many institutions during the pandemic, it's unlikely to reverse completely as access to testing returns to post-pandemic levels. With test-optional likely here to stay, it's important for institutions to understand the way that their testing policies shape students' application decisions.

Our research indicates that testing policy is an important factor for a significant share of prospects, with 15% of students reporting that they applied to a college specifically because it was test-optional. Our data also reinforces the widely discussed diversity, equity, and equality implications of eliminating testing requirements, as Black and Hispanic/Latinx/o/a students were much more likely than the mean to report that testing policy drove their application decision.

### TAKEAWAY

Understand the recruitment implications of your testing policy. If your institution is permanently test-optional, be sure to communicate clearly and effectively about your strategy. If your institution is not test-optional, take into account the potential DEI impact of your policy and the significant number of students who are likely not applying to your institution.

► For in-depth analysis and recommendations on this topic, read our white paper at [eab.com/test-optional-era](https://eab.com/test-optional-era).

"Did you apply to any schools that are test-optional?"

70%

Yes, but **it was not** the reason I applied

15%

Yes, and **it was** the reason I applied

A significant portion of students

9%

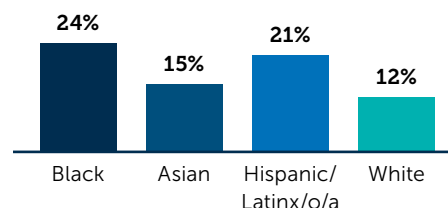
I don't know

6%

No

## Test-Optional Is Most Likely to Influence Black and Hispanic/Latinx/o/a Students

*"Yes, test-optional was the reason I applied"*



----- “ -----

I had no choice in  
where I enrolled. My  
parents decided for me  
based on financial aid.”

CURRENT COLLEGE FRESHMAN







## LESSON 4

**Concerns about  
the cost of college  
continue to rise.**

# Finances Remain the Top Factor in College Choice

## Gen Z Is Highly Cost-Conscious

Affordability continues to be the top consideration in Gen Z's choice of college, with 36% of students saying they picked their institution for its "affordable tuition," up slightly from 35% in 2020. Of students who did not enroll at their top-choice school, cost concerns strongly outweigh all other factors. With the pandemic exacerbating financial challenges for many families, it's not surprising that concerns about tuition and aid are gaining influence in students' choice of college.

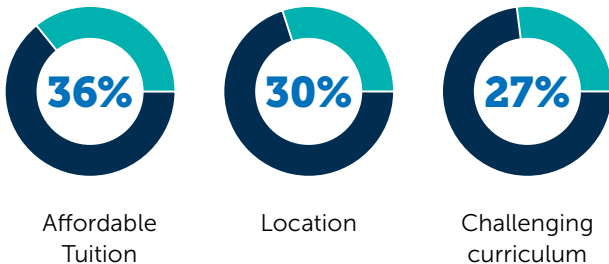
### TAKEAWAY

Clearly communicate your value proposition so that families understand the return they can anticipate from their investment in your institution.

► For actionable recommendations on this topic, read our white paper at [eab.com/WhyYoureWorthIt](https://eab.com/WhyYoureWorthIt).

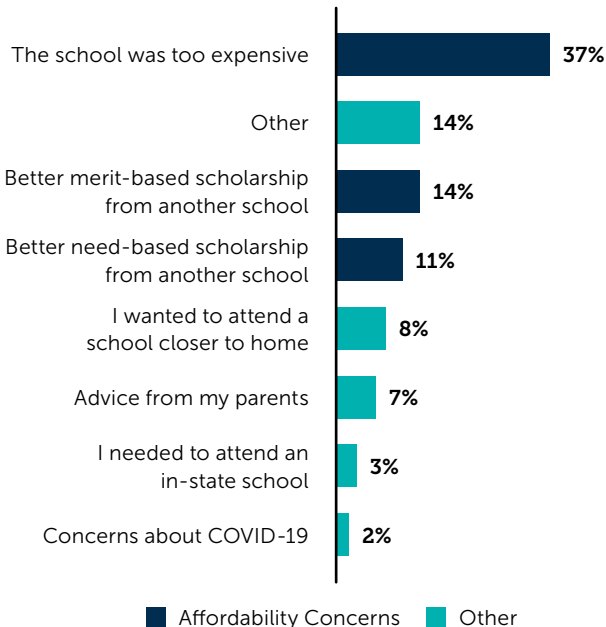
## "Why did you select the school where you are enrolled?"

Top 3 Responses from a List of 24



## "What is the primary reason you did not enroll at your first-choice school?"

Asked of Students Who Did Not Enroll at Their First-Choice School



# More Students Are Opting Out of College

## Concerns About Preparedness, Affordability, and Value Are Driving Nonconsumption

Today's students are more likely than their predecessors to opt out of college completely. Over the past five years of EAB New College Freshman Surveys, the share of high school graduates currently attending college has decreased from 98% in 2017 to 91% in 2021/2022. While students named wanting to take time off and concerns about mental readiness as their top two reasons for not attending college, doubts about affordability and value make up a sizable share of responses.

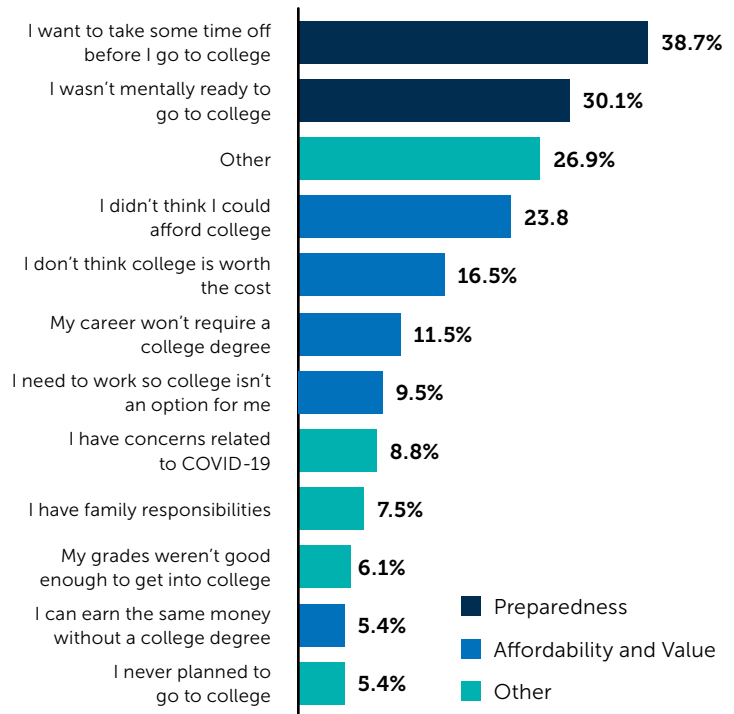
### College-Going Has Declined

**7%**

Percentage-point decrease in student survey participants attending college since 2017

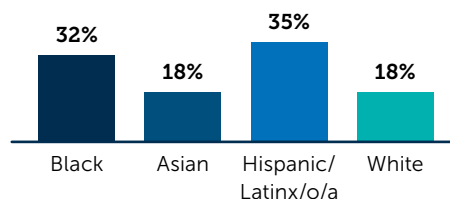
Our research illustrates the major role that family finances play in diversity, equity, and access, with Black and Hispanic/Latinx/o/a students much more likely than their Asian or White peers to respond that they didn't think they could afford a college education. We also found that family influence on nonconsumption varies by race/ethnicity, with Hispanic/Latinx/o/a students twice as likely as students from any other group to say they're forgoing college because of family responsibilities.

## "Why did you decide not to enroll at a college or university?"



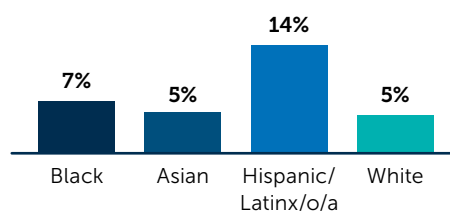
## "I didn't think I could afford it"

### Findings by Race/Ethnicity



## "I have family responsibilities"

### Findings by Race/Ethnicity



# FAFSA Filing Shows Room for Improvement

## Many Students Submit FAFSA Selectively

Even though many schools implemented new initiatives to boost FAFSA filing during the pandemic, our research shows that this area could benefit from additional attention. One in five students said they had submitted FAFSA information only to the school they decided to attend, meaning that many students are likely getting an incomplete picture of their aid options as they choose between colleges. Furthermore, lower-income students were most likely to say that they had submitted FAFSA information only to the colleges they were most interested in. This data indicates that schools should consider further expanding FAFSA-filing education and resources.

### Limited FAFSA Submissions

**21%**

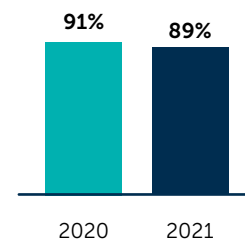
of students submitted FAFSA info only for the school they decided to attend.

### TAKEAWAY

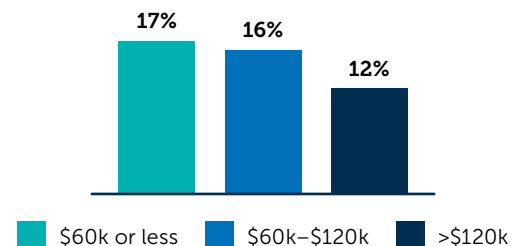
Encourage all students to submit FAFSA information to your school, and proactively reach out to students who are likely to qualify for need-based aid who haven't submitted their FAFSA to you.

## A Slight Dip in FAFSA-Filing in 2021

*"Did you apply for financial aid using the FAFSA?"*



## Lower-Income Students Most Likely to Say "I Only Submitted FAFSA to Colleges I Was Most Interested In"







## LESSON 5

# Recruitment no longer ends at enrollment.



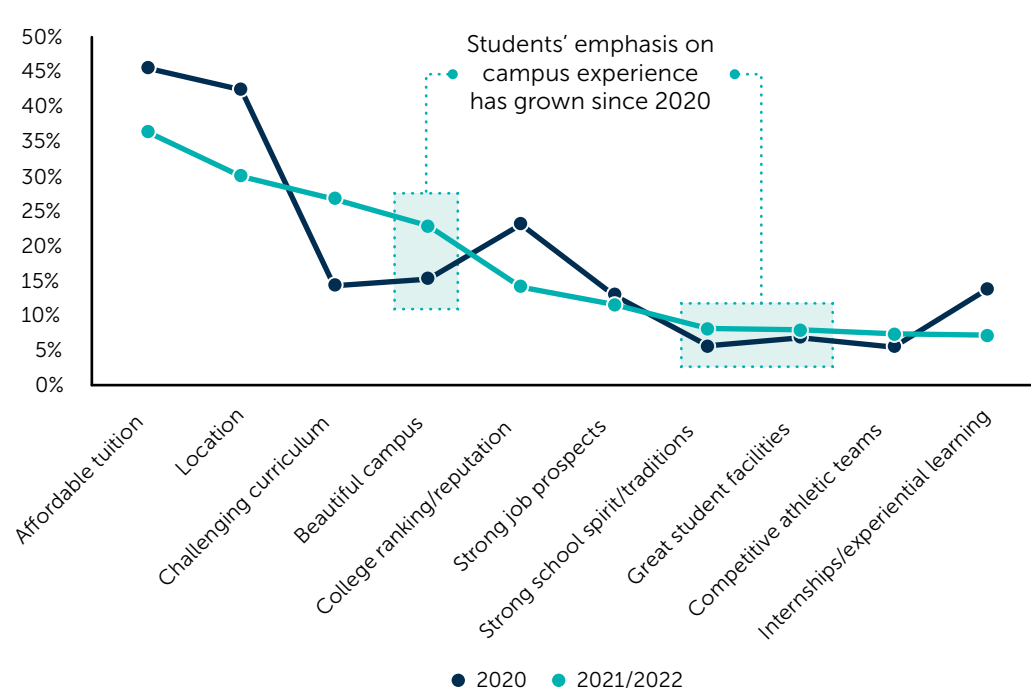
# Students Are Craving Experience and Connections

## Campus Life Is a Bigger Priority Post-pandemic

While financial concerns remain the top factor in students' choice of college, our research shows that they place more weight on their campus experience than they did at the start of the pandemic. Students ranked "beautiful campus," "school spirit and traditions," and "student facilities" more highly in our most recent survey than they did in 2020. After a year or more of lockdowns and Zoom classes, students are eager to immerse themselves in campus life.

### "Why did you select the school where you are enrolled?"

Top 10 Responses, Participants Could Pick Up to 3 from a List of 24



#### TAKEAWAY

Today's students want a fun and immersive post-pandemic experience from their college. Play up your vibrant campus life in student communications.



# Student Satisfaction Is Back Up from Mid-pandemic

## A Rebound in Satisfaction Levels

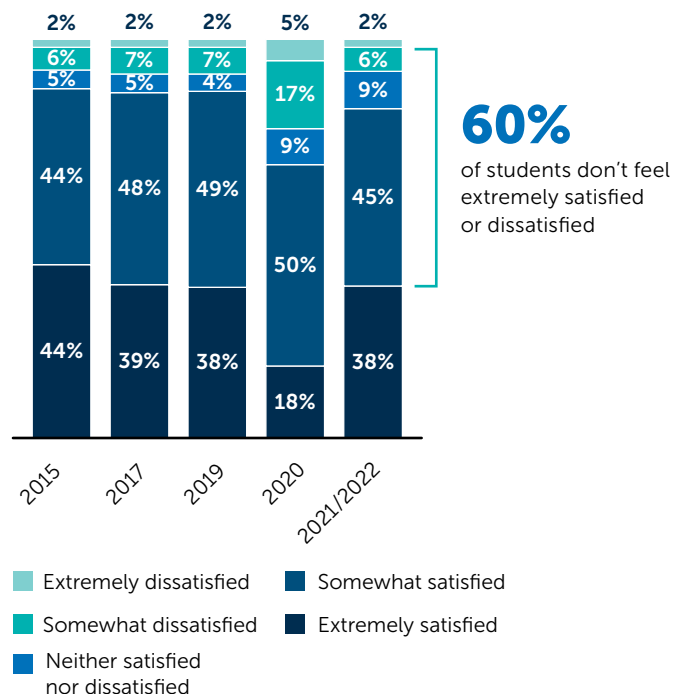
Our research also looked to students' assessment of their time at college so far. Student satisfaction levels took a big dip in 2020 when many campuses were shut down, but they ticked back up to pre-pandemic levels for students entering college in 2021. Whether students are satisfied or dissatisfied, our research shows that classes, social life, and campus are the top factors in their opinion.

It's important to note that, while students are happier in general now than previously, 60% of students still don't feel extremely satisfied or dissatisfied. This group should be one of special importance to campus leaders, given the primary role that retention plays in campus enrollment initiatives.

### TAKEAWAY

Support retention efforts at your institution by sharing satisfaction data with student success stakeholders.

## Satisfaction Levels Have Recovered, but Many Students Are Still Feeling Ambivalent

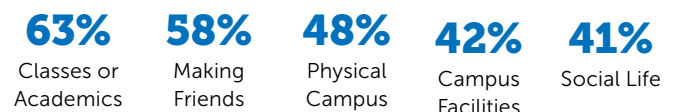


## Classes, Social Life, and Campus Play Largest Roles in Student Satisfaction

What has been most disappointing about your college experience? (asked of dissatisfied students)



What has been most satisfying about your college experience? (asked of satisfied students)



# Key Takeaways for Recruitment Strategy

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## **Your Web Presence Is More Important than Ever**

Gen Z prefers to use self-directed tools to research colleges and make their enrollment decision. Your website, search engine optimization, and presence on college search websites play a central role in how students and families will assess your institution.



## **Build Robust Parent Communication Streams**

Establish multichannel parent communication streams starting sophomore year. Early parent communication streams can help you lay the foundation for a constructive relationship with key recruitment influencers.



## **Personalized, Responsive Marketing Can Help You Win Students' Attention**

It's increasingly difficult to win students' hearts and minds at every stage of recruitment. Personalized marketing can help you build and deepen connections with students by delivering the right message, at the right time, through the right channel.



## **The Pandemic Exacerbated Financial Concerns**

Encourage all students to submit FAFSA information to your school, and proactively reach out to students who are likely to qualify for need-based aid who haven't submitted their FAFSA to you. Look for opportunities to articulate your value proposition effectively.



## **Students Are Hungry for Experience and Connections**

Today's students want a fun and immersive post-pandemic experience from their college. Amp up your communications about the vibrancy of life on your campus.

# Research Methodology

## OVERVIEW

EAB conducted a survey of 2021 high school graduates from February 6 to March 2, 2022, to learn about their preferred communication sources, application behaviors, college preferences, and satisfaction with their college experience thus far. The findings in this report are based on responses from 4,848 survey participants and analysis of student behavioral data across EAB's 1,100+ enrollment partners.

## PARTICIPANT PROFILE: 2021/2022 NEW COLLEGE FRESHMAN SURVEY

### College Plans

Percentage of participants currently enrolled at a college or university	91%
Percentage of enrolled students attending a four-year institution	89%

### Household Income

\$60,000 or less	25%
\$60,001–\$120,000	24%
\$120,001 or more	24%
Unknown	27%

### Location

South	29%
West	30%
Midwest	20%
Northeast	21%

### Ethnicity

Black	11%
Asian/Pacific Islander	16%
Hispanic/Latinx/o/a	20%
Native American	2%
White	62%

### First-Generation Status

First-Generation	21%
Non-First-Generation	79%

# Recruit and Enroll Your Next Class with **Enroll360**

## Enroll360 Solutions Help You Succeed at Each Stage of the Funnel

Our solutions deliver results, powered by an unrivaled recruitment ecosystem.



Cultivate



Apply



Aid



Yield

## Enroll360 Products for Student and Family Engagement

### Audience Generation

Build awareness and influence with the leading inquiry generation and **college exploration platforms**.

- ▶ Cappex
- ▶ Intersect
- ▶ College Greenlight

### Digital Experience

Engage Gen Z in **interactive virtual platforms** that tell your brand story and build affinity.

- ▶ YouVisit Virtual Tours
- ▶ Wisr Virtual Communities

### Digital and Web Strategy

Optimize your website and digital strategy to engage and convert prospective students.

- ▶ .EDU Content Strategy
- ▶ SEO

### Transfer Recruitment

Facilitate the transfer process and boost enrollment through best-in-class technology and marketing.

- ▶ Transfer Portal
- ▶ Transfer Marketing

## What Makes Enroll360 Different

- ▶ Marketing Orchestration
- ▶ Intelligent Analytics
- ▶ Unrivaled Reach
- ▶ Digital Immersion

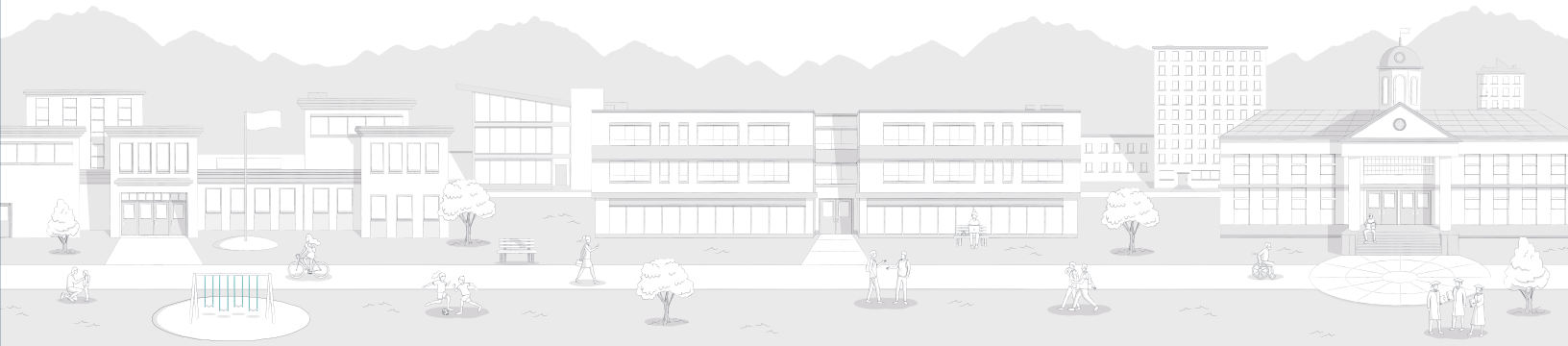
To speak with an expert or schedule a diagnostic conversation, email [eabenrollmentcomm@eab.com](mailto:eabenrollmentcomm@eab.com).

Learn more at [eab.com/Enroll360](https://eab.com/Enroll360)





# Education's Trusted Partner to Help Schools and Students Thrive



**Your  
Imperatives  
Determine  
Ours**

## **INSTITUTIONAL STRATEGY**

### **Prepare Your Institution for the Future**

Executive guidance rooted in research to support your strategic priorities

## **MARKETING AND ENROLLMENT**

### **Achieve Your Enrollment and Growth Goals**

Tailored partnerships powered by a recruitment ecosystem with unrivaled reach to enroll your future classes

## **STUDENT SUCCESS**

### **Build a Student-Centric Campus**

Technology trusted by 850 schools to retain, graduate, and empower more students

## **DIVERSITY, EQUITY, AND INCLUSION**

### **Advance DEI on Campus and in Your Community**

Technology, research, and bold initiatives to strengthen your DEI strategy and eliminate equity gaps

## **DATA AND ANALYTICS**

### **Embrace Digital Transformation**

Data and analytics solutions built for higher education to guide decisions and accelerate innovation

We partner with **2,500+** institutions to accelerate progress and enable lasting change.

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

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## **Sources**

2021/2022 New College Freshman  
Survey, EAB research and analysis.

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## 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](https://eab.com).