Presidents Brief

Intelligence to Inform Your Institutional Strategy

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FOCUS:

Common App First-Year Application Trends 2024–25: End of Season Report

The newly released *Common App First-Year Application Trends 2024–25: End of Season Report* offers important insights into student applicant behavior and enrollment shifts.

Here are **five takeaways** to inform your institutional enrollment strategy.

Introduction

The Common App's 2024–25 End-of-Season Report provides one of the clearest views of the enrollment landscape we have seen in years. Beneath the headline growth (+5% applicants; +8% applications), lies a set of structural shifts that should directly influence institutional strategy, positioning, and resource allocation. The movement of students toward **large public universities**, the accelerated growth of **first-generation and low-income students**, the geographic rebalancing toward the **South and Southwest**, and the continued rise in **multi-institution applicants** signal deep changes in student behavior.

There are **five high-impact insights to understand and act on now.**

1. Public institutions are pulling ahead—students and their parents are following.

Applications to **public universities grew 13%**, outpacing the **3% growth of private institutions**. This continues a trend from last year, when publics surpassed privates in total Common App volume for the first time.

Even more telling:

- Applicants applying **only to public institutions increased 9%**, the fastest-growing segment of applicant behavior.
- Since 2015-16, applicants applying **only to private institutions lag down 7%**.
- The strongest ten-year growth is among **highly selective publics and less-selective publics**, both up over 220% since 2015-16.

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Strategic Implications

- Public flagships have dramatically improved their academic rankings and reputation. These institutions stand out on all three legs of the experience economy* stool: strong academics/outcomes, lower costs, and an appealing student experience.
  - A national competition is now in play for public flagships to attract high academic achievers and out-of-state students.
  - Public flagships should consider their out-of-state strategy more intentionally to win—specifically, strategies tailored to specific student segments can enhance win rate.
- Private institutions will need stronger differentiation, stronger communication about value, higher investments in technology to support a full educational experience, and more aggressive yield and financial aid strategies to compete for cross-applicants who increasingly see public institutions as their first or default choice.
  - Being small is not the advantage it used to be in today's technology driven student experience.
  - Faculty-to-student ratios, the number of majors or clubs, and personal attention are not strong differentiators.
  - True differentiation is challenging; however, authentic distinction is what it takes to win more today.

* The term "experience economy" was coined in the late 1990s by economists B. Joseph Pine II and James Gilmore in the Harvard Business Review.

2. First-generation and low-income students are reshaping the applicant pool.

The most rapid applicant growth is coming from students who have historically been underrepresented:

- **First-generation applicants**: +14% (vs. +1% for continuing-gen)
- **Fee-waiver–eligible applicants**: +10% (vs. +3% for non-eligible)
- **Applicants from below-median-income ZIP codes**: +10% (vs. +4%)

These shifts are structurally changing the mix of applicants and the type of support they need once enrolled.

Strategic Implications

- Despite achieving enrollment goals, tuition revenue and budgets will remain under pressure due to increased need for financial aid.
- Winning more students who have a high ability to pay requires intentional strategy and investment. They are the most sought-after students in the market, and those with the most choices. Standard recruiting efforts will not yield these students.
- Retention and graduation rates are a higher risk for these students. Institutions—especially privates—will need to deliver new student support efforts at scale across academic, social, and financial dimensions to retain students even at current rates.
- FAFSA turbulence, affordability concerns, and pressure on families mean aid transparency, student success investments, and high-touch communication matter more than ever.

Recruiting these populations requires more, not less, communication.

3. Geographic power is moving south and southwest—rapidly.

The report confirms the demographic and enrollment power shift toward high-growth regions and states:

- The **Southwest posted 39% year-over-year growth**—by far the fastest in the country.
- **Texas alone grew 43%**, surpassing both California and New York as the #1 state for applicants for the first time.
- **Florida also surged**, now the #4 applicant-volume state.

Strategic Implications

- Institutions in the Northeast and Midwest are confronting mounting recruitment challenges as more students choose to enroll closer to home, particularly in high-growth states with universities and colleges who are prepared to grow.
- With intensified competition in these regions, the following approaches warrant consideration:
  - Significantly increase investment in targeted states. Outperforming in high-growth markets demands enhanced enrollment marketing, expanded on-the-ground recruitment teams, and tailored support for these geographic segments.
  - Develop a data-driven, intentional strategy for out-of-state recruitment. This could include travel stipends for campus visits, competitive financial aid packages to rival in-state offers, and campus resources designed specifically to support out-of-state student success.
  - Articulate a clear value proposition for attending college out of state. Clarifying the unique benefits, opportunities, and outcomes your institution provides.
  - Invest in solutions that leverage technology for competitive advantage. “Personalization” today is highly differentiating a digital experience that leads to meaningful connections, both online and in person.

Winning in these markets requires sustained effort, differentiated messaging, and continued support throughout the enrollment process. It requires a highly informed and intentional strategy fueled to compete in the experience economy.

4. Students are becoming “portfolio applicants”—applying broadly across segments.

Applicants applied to an **average of 6.80 institutions**, up from 6.64 last cycle—and up 46% from a decade ago.

Most critically:

- Growth is strongest among students applying to **both public and private institutions**.
- This hybrid portfolio behavior now drives most of the total application growth.
- Students are **applying across** price points, selectivity brackets, and geographic boundaries in unprecedented volume.

Strategic Implications

- Your competitive peer set is now broader and less predictable.
- Leaders should expect increased volatility in prospect-to-applicant and admit-to-enroll conversion.
- To improve your chances of success, consider these steps:
  - Build pipelines with middle schools through visit programs and camps.
  - Ensure enrollment marketing awareness with high school sophomores and juniors is in place.
  - Invest in strategic positioning and messaging to address portfolio applicants.
    - If you are a public flagship:
      - *Why choose your flagship over others?*
      - *Why spend more to attend out of state?*
      - *Why select your honors college invitation?*
      - *Why choose a public over a private institution?*
  - This value proposition is particularly important for high academic achievers and affluent families.
    - If you are a private institution:
      - *Why choose your institution and not a flagship or emerging flagship?*
      - *Why enroll at your institution instead of another private?*
      - *Why not go out of state (especially in the Northeast)?*
      - *Are your student experience and alumni community up to par?*
  - Avoid the pitfall that being “affordable” differentiates you when public institutions own that position.

There is a small set of institutions in a position to be “first choice.” Winning today takes a more intentional and nuanced market position and recruiting approach.

5. Student demographics continue to diversify—especially among underrepresented minority applicants.

Underrepresented minority (URM) applicants **grew 14%**, with especially strong increases among:

- **Latinx applicants**: +15%
- **Black or African American applicants**: +12%
- **Two or more races**: +10%

Importantly, the report demonstrates **no evidence of declines in race/ethnicity reporting or application behavior** following the U.S. Supreme Court's affirmative action ruling in 2023. This is critical context as institutions re-shape their admission policies and practices.

Strategic Implications

- This trend reinforces the strength of public flagships and the new emerging flagships' position in the marketplace.
  - URM students are already successful there.
  - Prospective students sense they belong there.
- Private institutions need to improve organic recruitment of these students.
  - Find a natural way to share that these students thrive at your institution. Pressing too hard can be a turn-off. On the other hand, not enabling them to feel they belong is a missed opportunity.
  - Trying to use that you are "diverse" as a differentiator is no longer a position when publics are the most diverse institutions in the nation. You must make the case for your experience over your profile.
- Presidents should be mindful that on many campuses, demographic growth of URM groups is outpacing institutional capacity to support them, which impacts retention and persistence rates.

Closing Perspective for Presidents

The 2024–25 data reinforces a central reality:

Student behavior is shifting faster than institutional strategy.

The winners in this environment will be institutions that:

1. Rethink and sharpen their **differentiation**.
2. Large publics should uniquely build **out-of-state recruitment** programs.
3. Most privates should aggressively establish a **position in the market** that is focused on a specific strength and not being small and private — for example, being a leader in health sciences, or having the lowest student debt in the state.
4. Intentionally recruit **key student segments** uniquely. That is, dedicate focused admissions counselors, events, tours, and enrollment marketing designed specifically for key student groups, such as high academic achievers, out-of-state students, or families with a higher ability to pay.
5. Plan to increase investments in **new markets**. The return will take time to build, but you will see growth in the markets for which you make a sustainable effort in on-the-ground recruiting, digital and social marketing, and full enrollment campaigns designed specifically for those markets.
6. Portfolio students are harder to yield. It requires improving recruiting in the early stages; at a minimum, enrollment marketing and recruiting should **start in the sophomore year**. Market leaders have middle school pipeline development programs, such as a dedicated school visit day, academic programs, and sports camps.
7. Get faculty aligned on the reality that **more students come in less prepared** as previous classes. Turn this into an advantage by building out **academic readiness programs** that begin before they arrive and carry through to graduation.

These shifts no longer simply represent short-term volatility—they are structural.

Presidents who adapt their strategic plans, budget models, and enrollment operations to these realities will position their institutions to grow in a market that is increasingly choosing scale, simplicity, and affordability.

3E Intelligence Team

James Rogers, Co-Founder & CEO
3 Enrollment Marketing

With three decades of experience in modern marketing strategy and execution, Jim leads 3 Enrollment Marketing with a forward-thinking approach. He has a unique ability to anticipate industry shifts, integrating emerging technologies while staying grounded in core strategy. Passionate about the transformative power of higher education, Jim is committed to helping institutions harness the power of modern marketing to drive student success and institutional growth.

Patricia Maben, Co-Founder & President
3 Enrollment Marketing

With 25 years of experience in enrollment management, Patricia has seen firsthand the transformational impact of higher education on individuals, communities, and society. As an on-campus enrollment practitioner, an enrollment marketing consultant to more than 60 institutions, and a creator of innovative enrollment solutions, Patricia has built a career dedicated to helping institutions navigate the growing complexities of student recruitment. She co-founded 3 Enrollment Marketing to provide a smarter, more effective approach for enrollment leaders facing today's challenges.

Mary Grondahl, Vice President
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A leader in strategic planning, enrollment management, and marketing, Mary drives transformative change in higher education. With decades of experience conducting institutional audits and market analyses, she helps senior leaders identify and strengthen their competitive positioning. Mary specializes in crafting modern strategic plans that align with each institution's unique challenges and opportunities, ensuring long-term success in a rapidly evolving higher education landscape.