Enrollment Planning Update to Budget Planning Council

November 3, 2020, 12-2 p.m.
Total University Enrollments
Fall 2020 Preliminary Final Headcount as of Census

OHIO continues to diversify enrollment, with more than half of total enrollment coming from categories other than Athens campus traditional undergraduates in fall 2020.
Total University Enrollments

Fall 2020 Preliminary Final Headcount as of Census

Total Headcount: 30,409

- Census date: 9/7/2020
- Difference vs. 2019: 2,228 (-6.8%)
- All headcount data includes both full-time and part-time students
- Data considered preliminary; changes are anticipated due to multiple-start online programs and the extended withdrawal period.
TOTAL Enrollments- Change Analysis

Total Enrollment Variance

- Undergraduates: (1178)
- Graduate ground: (126)
- Regional Campuses: (520)
- Undergrad online: (582)
- Graduate online: +158
- Medical: +20

Total Difference vs 2019: (2,228)
Factors Considered in SEEC Assumptions

- Landscape and market data
- National trends, precedents, surveys
- Graduation rates and trends
- Competitive info and intelligence
- YTD metrics and milestones
- Interest indicators and activities
- Scholarship predictive modeling
- Economic conditions
- Government actions, restrictions, orders
- Institutional changes
- International considerations
- COVID-19 impacts and outlook
**Selected Resources Used in Enrollment Planning**

**National Data Sources and Research**
- IPEDS Data Center
- College Navigator
- Common Data Set Initiative
- National Student Clearinghouse
- *Knocking at the College Door* (WICHE)
- The College Board
- National College Attainment Network
- ACT | NRCCUA Encoura and Eduventures reports
- NSSE
- High-Schools.com
- EAB
- United States Census Bureau
- Bureau of Labor Statistics

**State Resources**
- ODHE Enrollment Reports
- ODHE Higher Education Information (HEI) System

**Marketing**
- Admitted Student Questionnaire
- Proprietary and commissioned research
- Google Analytics

**Institutional Data**
- CRM database (Technolutions Slate)
- Institutional Effectiveness and Analytics publications and ad hoc reporting
- Oracle Business Intelligence
- Analytics and Decision Support System
- Advisory boards
Recruitment Strategy
Undergraduate Recruitment Strategy

Creating the Enrollment Pipeline

- **Prospects**
  - Testing agencies (College Board, ACT | NRCCUA)*
  - Digital marketing
  - Survey-based list sources
  - Referrals
  - Partnerships with schools, institutions, community-based organizations, licensure agencies, and employers

- **Inquiries**
  - Traditional, digital, and web-based advertising/marketing
  - Test scores (ACT, SAT, AP, TOEFL, IELTS, CLEP, etc.)
  - Application search campaigns
  - Recruitment travel and on- and off-campus events
  - Academic camps, summer programming, CC+
  - Alumni engagement and referrals
  - School counselor, parent, and other influencer engagement
Expanded Geography: Athens Fall Freshmen Prospects

Ohio and regional recruitment
Expanded Geography: Athens Fall Freshmen Applicants

Ohio and regional recruitment

2012

2020
Expanded Geography: Athens Fall Freshmen Prospects

National recruitment

2012

2020
Expanded Geography: Athens Fall Freshmen Applicants

National recruitment

2012

2020
Changes to the Testing Landscape Due to COVID-19
Source: EAB, October 2020

SAT

ACT
Market Research Data
Admitted Student Questionnaire

- College Board Survey
- Invited audience = all admitted students
- Conducted 2014, 2017, 2019
- Highlights shift in perceptions vs. other institutions
- Explores:
  - Perception of selected college characteristics as related to OHIO and peer set
  - Information sources and their quality
  - Influence of financial aid and/or college costs
  - Accepted student overlap with competitors and preference rank
Still recognized as “fun” and “partying” among both enrolling and non-enrolling students.

(2019 data)
Number of Universities Applied

Half of all students apply for 3-6 institutions.

More than 20% apply for 10 or more!! That has more than doubled since 2014.

<table>
<thead>
<tr>
<th>APPLICATIONS (NUMBER OF COLLEGES)</th>
<th>ALL ADMITTED STUDENTS</th>
<th>ENROLLING STUDENTS</th>
<th>NON-ENROLLING STUDENTS</th>
<th>YIELD</th>
</tr>
</thead>
<tbody>
<tr>
<td>N(%)</td>
<td>18057 (99%)</td>
<td>3601 (99%)</td>
<td>14456 (99%)</td>
<td></td>
</tr>
<tr>
<td>Average Number:</td>
<td>6.8</td>
<td>4.4</td>
<td>-- 7.4</td>
<td></td>
</tr>
<tr>
<td>One (us only)</td>
<td>3%</td>
<td>12%</td>
<td>1%</td>
<td>83%</td>
</tr>
<tr>
<td>Two</td>
<td>6%</td>
<td>15%</td>
<td>4%</td>
<td>47%</td>
</tr>
<tr>
<td>Three</td>
<td>14%</td>
<td>20%</td>
<td>12%</td>
<td>29%</td>
</tr>
<tr>
<td>Four</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Five</td>
<td>13%</td>
<td>11%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Six</td>
<td>11%</td>
<td>10%</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>Seven</td>
<td>9%</td>
<td>4%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Eight</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>17%</td>
</tr>
<tr>
<td>Nine</td>
<td>4%</td>
<td>1%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Ten or more</td>
<td>21%</td>
<td>6%</td>
<td>24%</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>
Edelman Research
Prospective Research

- Interviewed rising high school juniors and seniors and parents of rising high school juniors and seniors
  - n = 400 for student prospects
  - n = 200 for parents of prospects
- Completed in September
- Explores:
  - Priorities in the decision making process
  - How well is OHIO associated with those priorities
  - How does that compare to competitors
  - What influences opinion
Priorities for Prospects

Non-traditional and traditional students prioritize similar consideration factors.

**HIGH PRIORITIES**

- **89%** prioritize a place where students are safe
- **86%** prioritize affordability
- **86%** prioritize a good value for the investment

**LOW PRIORITIES**

- **31%** prioritize a residential campus
- **28%** prioritize top-ranked athletic programs
- **24%** prioritize an active party scene

Q1: We’d like to understand some of your general feelings about higher education. Please rate the degree to which you agree or disagree with the following statements:
Q2: How much of a priority are the following factors when considering which college or university to attend? Base: Traditional prospective students, n=300; Non-traditional prospective students, n=100
Priorities for Parents

Parents prioritize safety and high job placement rate after graduation more than students, and are less concerned with history and heritage, athletics, and the party scene.

**HIGH PRIORITIES**

- **96%** prioritize a place where students are safe
- **92%** prioritize a good value for the investment
- **91%** prioritize high job placement rate after graduation

**LOW PRIORITIES**

- **34%** prioritize a rich history and heritage
- **22%** prioritize top-ranked athletic programs
- **19%** prioritize an active party scene

Q1: We’d like to understand some of your general feelings about higher education. Please rate the degree to which you agree or disagree with the following statements:

Q2: How much of a priority are the following factors when considering which college or university to attend? Base: Prospective parents, n=200
What do prospects associate us with?

Top 5 attributes for Ohio University

- **50%**  
  Well-recognized in the state and the region.

- **50%**  
  Is known for having school spirit or pride.

- **49%**  
  Has a residential campus.

- **46%**  
  Is a place where students are safe.

- **45%**  
  Has a positive impact on the surrounding region.
# Current students vs. prospects

<table>
<thead>
<tr>
<th>University Attribute</th>
<th>Current Students</th>
<th>Prospects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is a good value for the investment</td>
<td>82%</td>
<td>40%</td>
</tr>
<tr>
<td>Empowers personal growth</td>
<td>82%</td>
<td>40%</td>
</tr>
<tr>
<td>Offers hands-on learning experiences</td>
<td>80%</td>
<td>43%</td>
</tr>
<tr>
<td>Has high job placement rate after graduation</td>
<td>73%</td>
<td>41%</td>
</tr>
<tr>
<td>Exposes students to different perspectives</td>
<td>77%</td>
<td>44%</td>
</tr>
<tr>
<td>Connects students to internships and other work experience</td>
<td>74%</td>
<td>39%</td>
</tr>
<tr>
<td>Has top-ranked academic programs</td>
<td>61%</td>
<td>43%</td>
</tr>
</tbody>
</table>
## Legacy prospects vs. non-legacy

<table>
<thead>
<tr>
<th>University Attribute</th>
<th>OHIO Legacy</th>
<th>Non-Legacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is well-recognized nationally</td>
<td>89%</td>
<td>38%</td>
</tr>
<tr>
<td>Has a high job placement rate after graduation</td>
<td>89%</td>
<td>34%</td>
</tr>
<tr>
<td>Has top-ranked academic programs</td>
<td>87%</td>
<td>37%</td>
</tr>
<tr>
<td>Is academically challenging</td>
<td>83%</td>
<td>35%</td>
</tr>
<tr>
<td>Exposes students to different perspectives</td>
<td>83%</td>
<td>38%</td>
</tr>
<tr>
<td>Is a good value for the investment</td>
<td>77%</td>
<td>35%</td>
</tr>
<tr>
<td>Offers hands-on learning experiences</td>
<td>72%</td>
<td>39%</td>
</tr>
<tr>
<td>Connects students to internships and other work experience</td>
<td>70%</td>
<td>35%</td>
</tr>
<tr>
<td>Empowers personal growth</td>
<td>70%</td>
<td>41%</td>
</tr>
</tbody>
</table>
# Program association – internal audiences

INTERNAL AUDIENCES SEE MORE DIFFERENTIATION IN PROGRAMS ACROSS COMPETITORS COMPARED TO EXTERNAL AUDIENCES

<table>
<thead>
<tr>
<th>INTERNAL AUDIENCES</th>
<th>TOP ASSOCIATED PROGRAMS/COLLEGES</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMMUNICATION, MEDIA, AND JOURNALISM (79%)</td>
<td>ENGINEERING (46%)</td>
<td></td>
</tr>
<tr>
<td>BUSINESS (65%)</td>
<td>MEDICINE (75%)</td>
<td></td>
</tr>
<tr>
<td>NURSING (61%)</td>
<td>BUSINESS (30%)</td>
<td></td>
</tr>
</tbody>
</table>

Q17: Which, if any, of the listed programs/colleges do you associate with the following universities? (Base: Total: Ohio University, n=249, University of Cincinnati, n=142, Ohio State, n=214, Miami University, n=156)
# Program association – external audiences

<table>
<thead>
<tr>
<th>Rank</th>
<th>Program / College</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Arts and Sciences</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>Business</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>Business</td>
<td>44%</td>
</tr>
<tr>
<td></td>
<td>Business</td>
<td>45%</td>
</tr>
<tr>
<td>2</td>
<td>Business</td>
<td>43%</td>
</tr>
<tr>
<td></td>
<td>Engineering</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>Medicine</td>
<td>44%</td>
</tr>
<tr>
<td></td>
<td>Education</td>
<td>43%</td>
</tr>
<tr>
<td>3</td>
<td>Education</td>
<td>41%</td>
</tr>
<tr>
<td></td>
<td>Education</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>Nursing</td>
<td>39%</td>
</tr>
<tr>
<td></td>
<td>Arts and Sciences</td>
<td>41%</td>
</tr>
</tbody>
</table>

Q17: Which, if any, of the listed programs/colleges do you associate with the following universities? (Base: Total: Ohio University, n=330, University of Cincinnati, n=241, Ohio State, n=417, Miami University, n=229)
Initiatives and Opportunities for Enrollment

- New University-wide branding and message platform with an integrated media plan and an emphasis on enrollment marketing: **Forever OHIO**
  - Return on experience, value for cost, OHIO Guarantee+
- Evaluation and modification of University scholarship programs
- Continued expansion and diversification of outreach and recruitment strategy
  - Geographic, demographic, delivery mode, traditional & non-traditional audiences, academic level
  - Diversification of lead generation sources and partnerships, including with community-based organizations
- Renewed emphasis on alumni engagement in enrollment
- Integration of regional campus admission processes as part of OneOHIO
- Ongoing evolution of strategic enrollment management for graduate and online programs