YSU Future State Discussion
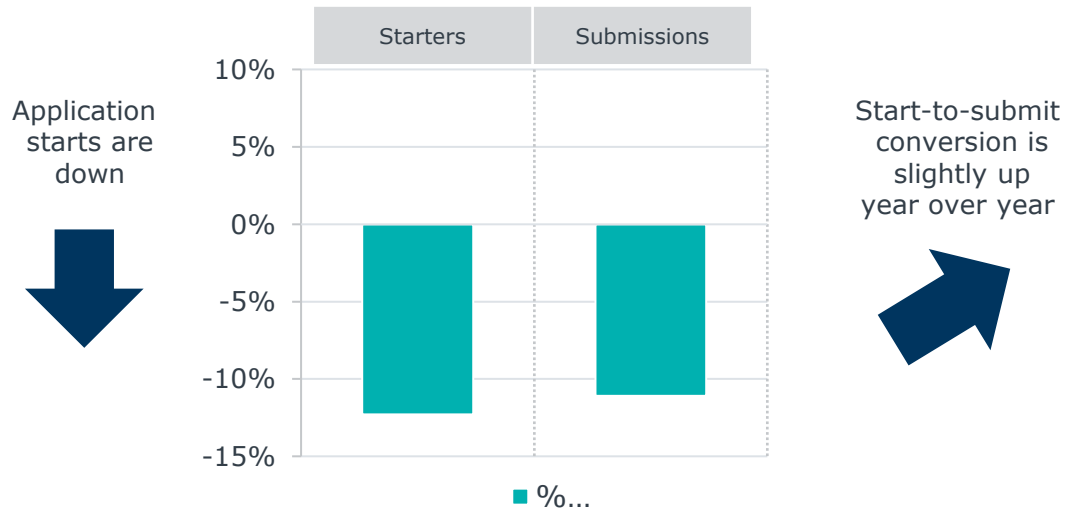
Anticipating Youngstown State's Enrollment Possibilities

1. **Fall 2021 Enrollment Trends**

2. Enrollment Landscape for YSU and List Source Insights

3. Understanding Trends with Current Freshmen

4. Decision IQ

Fewer Students Are Initiating Applications on Their Own

Self-Initiates Change by Application Status

EAB Web Applications Only

Application starts are down

Start-to-submit conversion is slightly up year over year

	Starters	Submissions

10%
5%
0%
-5%
-10%
-15%

■ %...

N=93,000 applications, 59 schools

A lack of self-initiated applicants is causing an overall decline in application submissions

Submitted Application Change by Student Audience

| Inquiry Pool	New Names	Previously Purchased	Self-Initiates

■ % Change Applications
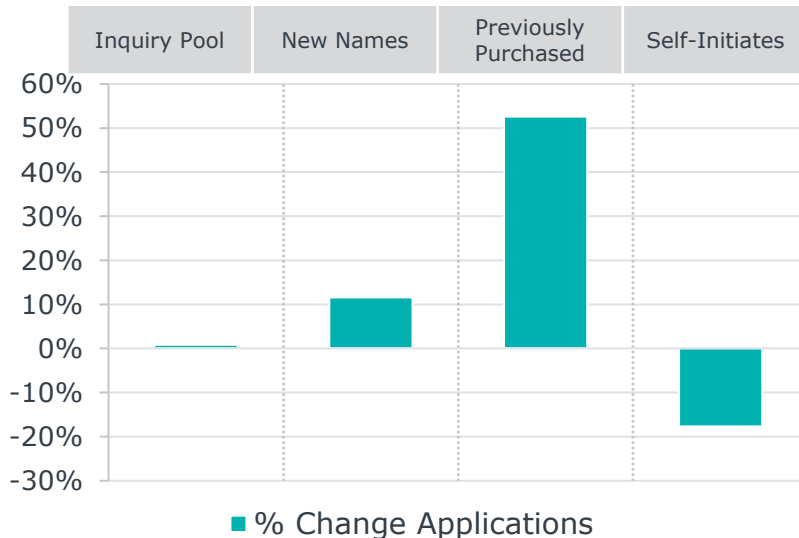
COVID-19 mitigation strategies for New Senior and Previously Purchased Names are working:

- Application rate from new GPA-only Senior Names is **40% higher** than average

- **6X** more applications from PSAT and AP lists than last year

- **53% increase** in applications from Previously Purchased students

N=1,314,000 applications, 199 schools

Tracking App Trends by Household Income and EAB Marketing Influence

Application Change by Median Household Income

-5.7%	1.3%	-0.2%	-0.8%
$60,000 or less	$60,001 - $100,000	$100,001 or more	Unknown/Interna..
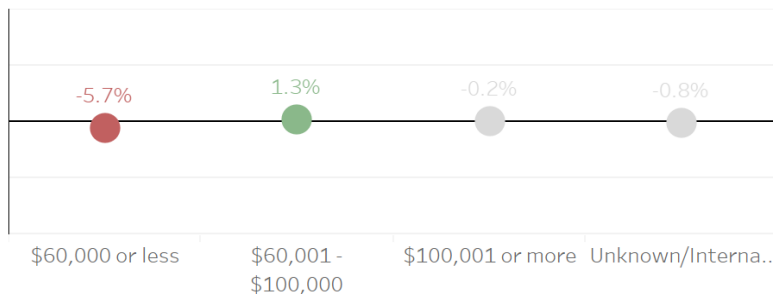
Declines Across the Board, but Most Severe for non-caucasian Students

Submitted Application Change by Student Ethnicity

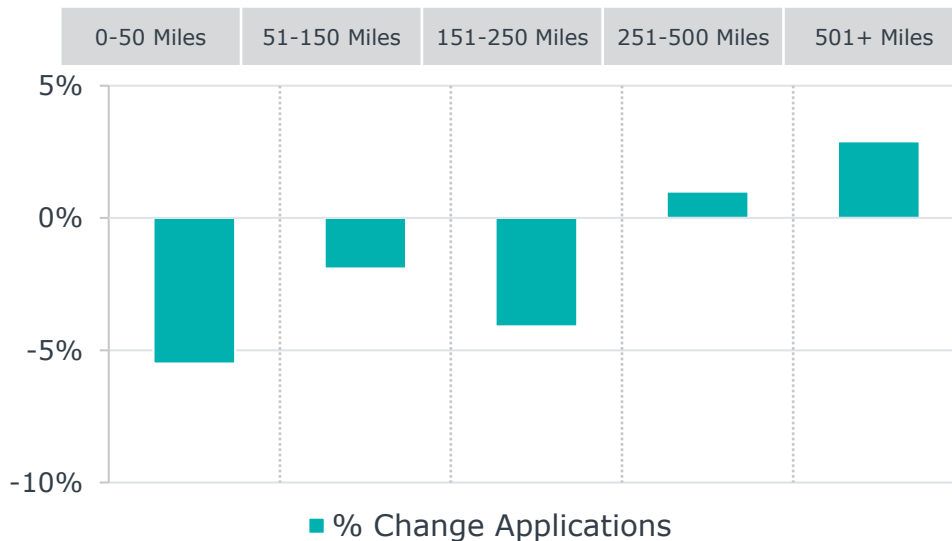■ % Change Applications
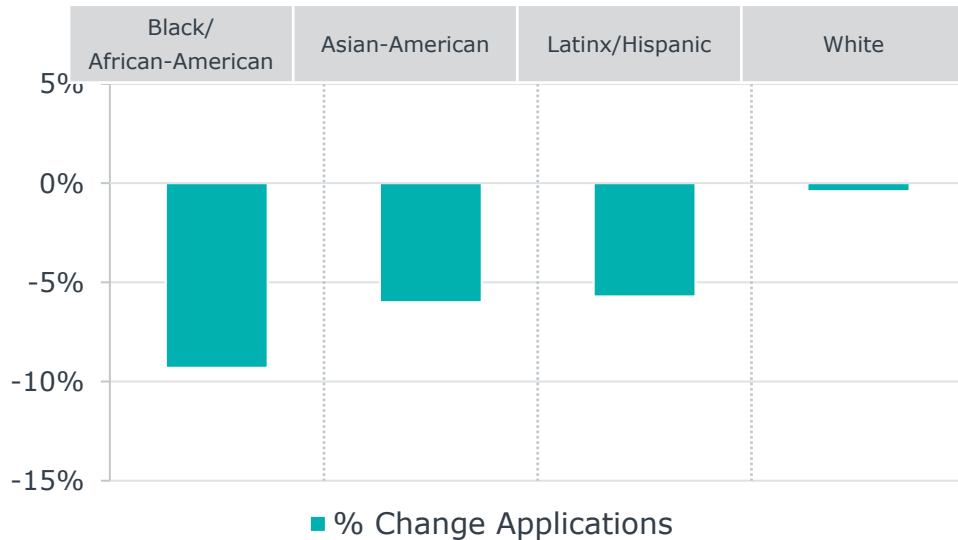
N=199 schools

Families Exploring Schools Far Away Are Still Applying

Submitted Application Change by Student Distance from Campus

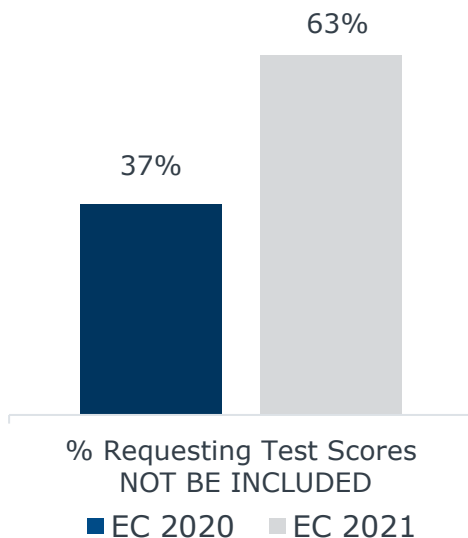| 0-50 Miles | 51-150 Miles | 151-250 Miles | 251-500 Miles | 501+ Miles |

■ % Change Applications

N=199 schools

Test-Optional Applications Are Up More Than 25% Points over Last Cycle

**Percentage of Applicants Requesting Test Score
NOT BE INCLUDED in Admit Decision**

Entering Class 2020 vs. 2021 to Date

63%

37%

% Requesting Test Scores
NOT BE INCLUDED

■ EC 2020   ■ EC 2021

> *Yes, I have seen that you have gone test optional. This is great as due to covid-19 I have not been able to take the SAT or ACT. I plan to soon submit my common application.*

N=23,000 applicants; 18 schools

Aggressive Admit Growth Despite Application Decline

Admit Change by Student Geographic Region

Northeast	Midwest	Southeast	Southwest	West

Apps: -4.2%　Apps: +0.2%　Apps: -1.3%　Apps: -5.4%　Apps: -1.2%
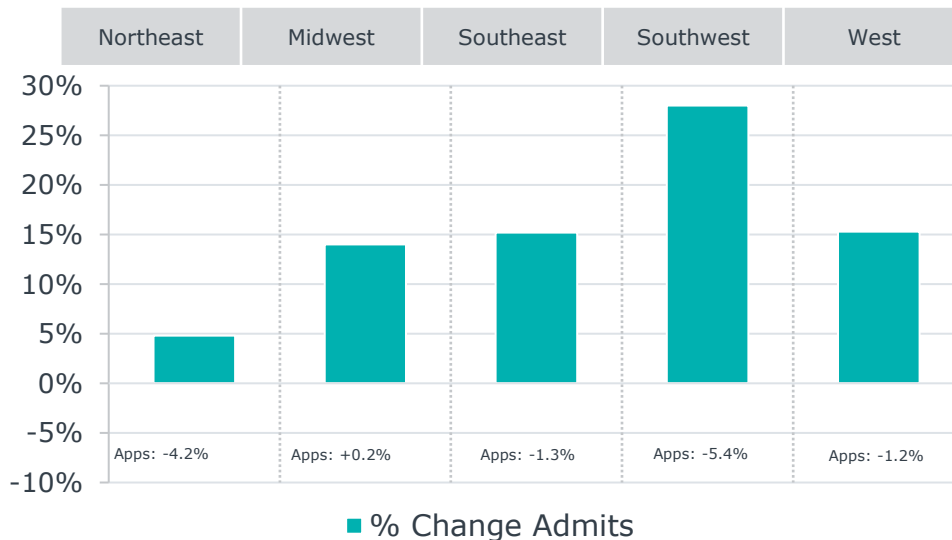
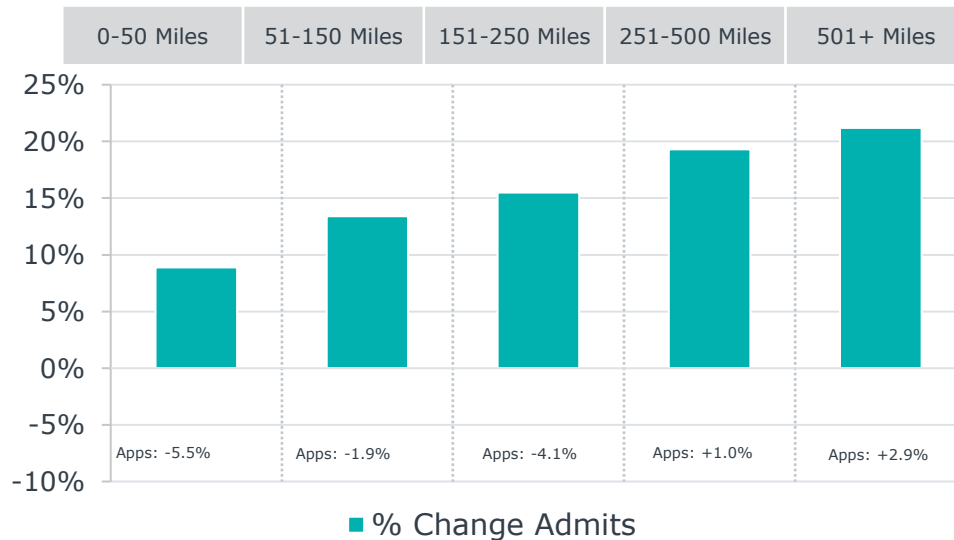■ % Change Admits

N=185 schools

Strong Admit Volume Offsets Decline in Applications from Local Markets

Admit Change by Student Distance from Campus

0-50 Miles	51-150 Miles	151-250 Miles	251-500 Miles	501+ Miles

Apps: -5.5%   Apps: -1.9%   Apps: -4.1%   Apps: +1.0%   Apps: +2.9%

■ % Change Admits

N=185 schools

Rebound at Admit Stage for Students of Color

Admit Change by Student Ethnicity

| Black/African-American | Asian-American | Latinx/Hispanic | White |

Apps: -9.3%   Apps: -6.0%   Apps: -5.7%   Apps: -0.4%

■ % Change Admits
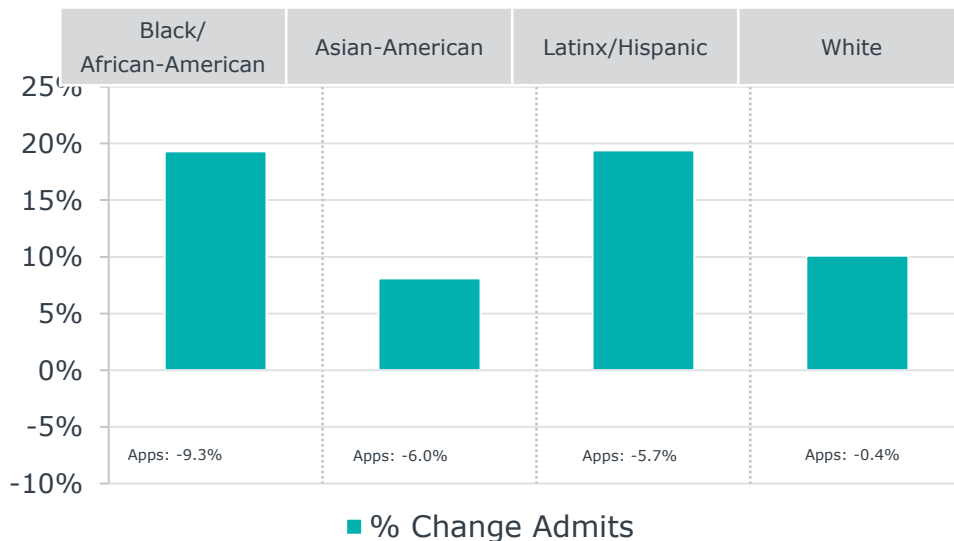
N=185 schools

4,537 High School Seniors

Data Collection:
November 17–December 3, 2020

Online Survey Explored:

Post-high school plans

Application process

Changes in application process due to the pandemic

FAFSA completions and concern about college costs

1. **Shifting application patterns:** Students are planning to submit eight applications, but they are taking their time and on average had applied only to about half (5.5 completed, 4.6 planned) of the colleges on their list.

2. **Students submitting FAFSAs before applying for admission:** 74% of respondents sent their FAFSA to a school to which they have not yet applied.

3. **College cost concerns exacerbated:** 57% of respondents reported that the pandemic has heightened their anxiety about college costs, and 50% limited the number of schools they applied to because of financial concerns.

4. **Academic preparation suffering:** 66% of students indicated that the pandemic has heightened their worries about doing well in college.

5. **Negative effects of COVID-19 are more pronounced for underrepresented students:** access to the information and support they need is limited given the other issues their counselors are addressing.

1,004 High School Counselors

Data Collection:
September 15–October 12, 2020

Online Survey + Webinar Explored:

Preferred interactions with colleges
General approach to counseling
Changes to counseling approach due to COVID-19
Student concerns about college
Effect of COVID-19 on modality and sense of safety

1. **Support student exploration.** The pandemic means less counselor support for college search and applications. Support DIY efforts by making sure your institutional website is compelling and SEO-optimized. Keep virtual events topical and no longer than 45 minutes a session. Experiment with content and timing. Focus on interaction vs. presentation. Students are engaged but also overwhelmed and anxious.

2. **Address student/parent financial concerns.** Provide more cost- and aid-related virtual content in simple and engaging language. Offer small bites of information that reflect milestones in the process. Never discuss cost without including value messages. Consider a general financial aid series to share with high school counselors.

3. **Back to fundamentals.** Student and parent pragmatism heightened. What are your majors? How can I connect with jobs at graduation? What internships and practicums will prepare me for a job? Are you affordable for my family? Why you over another school? Focus on the why—not the what; benefits over features.

4. **Support high school counselors proactively.** Most counselors want colleges to contact them directly with information that is easily shared among counselors and with students. They prefer email, then virtual or face-to-face events plus the website to get information. Consider web content built for them.

United States High School Graduation Rates

Actual: 1993-2019; Projected: 2020-2036

2021: 3,753,990

2031: 3,696,640

Graduation rate increases mitigate contracting youth population

Birth declines still predict long-term graduate declines
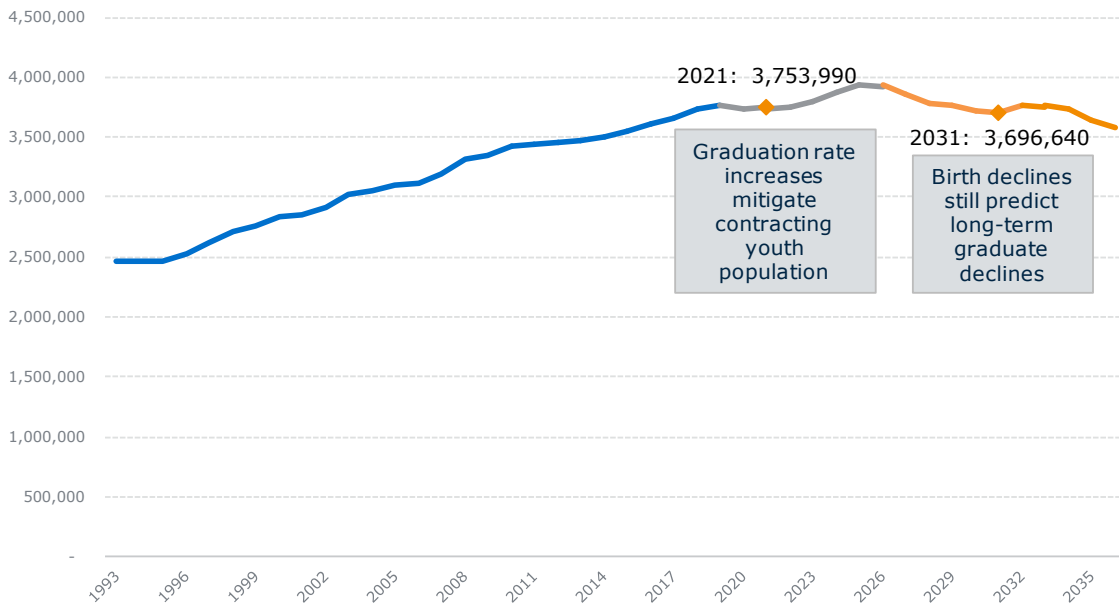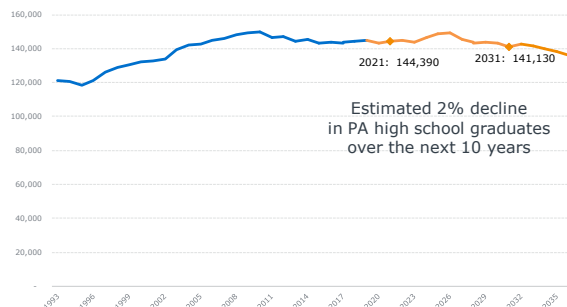
Ohio & Pennsylvania High School Graduation Rates

Actual: 1993-2019; Projected: 2020-2036

Ohio High School Graduates

2021: 134,700
2031: 126,640
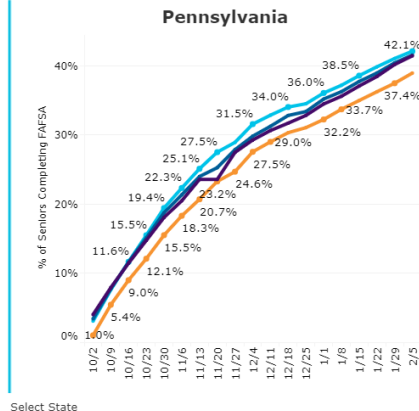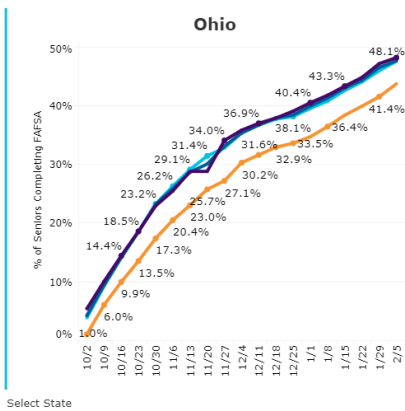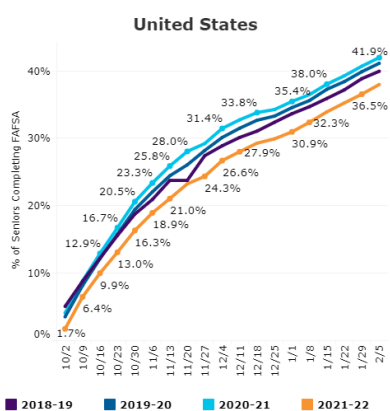
Estimated 6% decline
in OH high school graduates
over the next 10 years

Pennsylvania High School Graduates

2021: 144,390
2031: 141,130
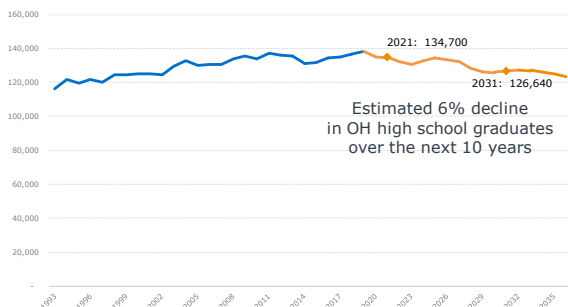
Estimated 2% decline
in PA high school graduates
over the next 10 years

Projected Change in Public High School Graduates by Ethnicity
from 2021 to 2031

State	American Indian/ Alaskan Native	Asian/ Pacific Islander	Black Non-Hispanic	Hispanic	White Non-Hispanic
Ohio	20	1,480	1,250	2,640	-11,860
Pennsylvania	-10	1,410	-440	6,640	-11,210
Total Change	10 2.9%	2,890 33.2%	810 2.5%	9,280 47.4%	-23,070 -13.3%

Estimated Percent of Seniors Completing a FAFSA is Tracking Far Below Historical Rates
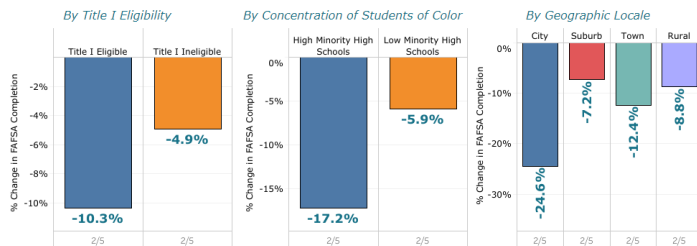
Source: Student National College Attainment Network (NCAN), https://public.tableau.com/profile/bill.debaun.national.college.acce ss.network#!/vizhome/FormYourFutureFAFSATracker/ComparebyC ycle

Entering Class 2021

3,100,000

Total student population available across the sources

› College Board

› ACT

2.3M

Students who have taken SAT, PSAT, AP or opted in with no assessment

800K

Students who have taken ACT or PreACT

10% decline tracking year-over-year comparison
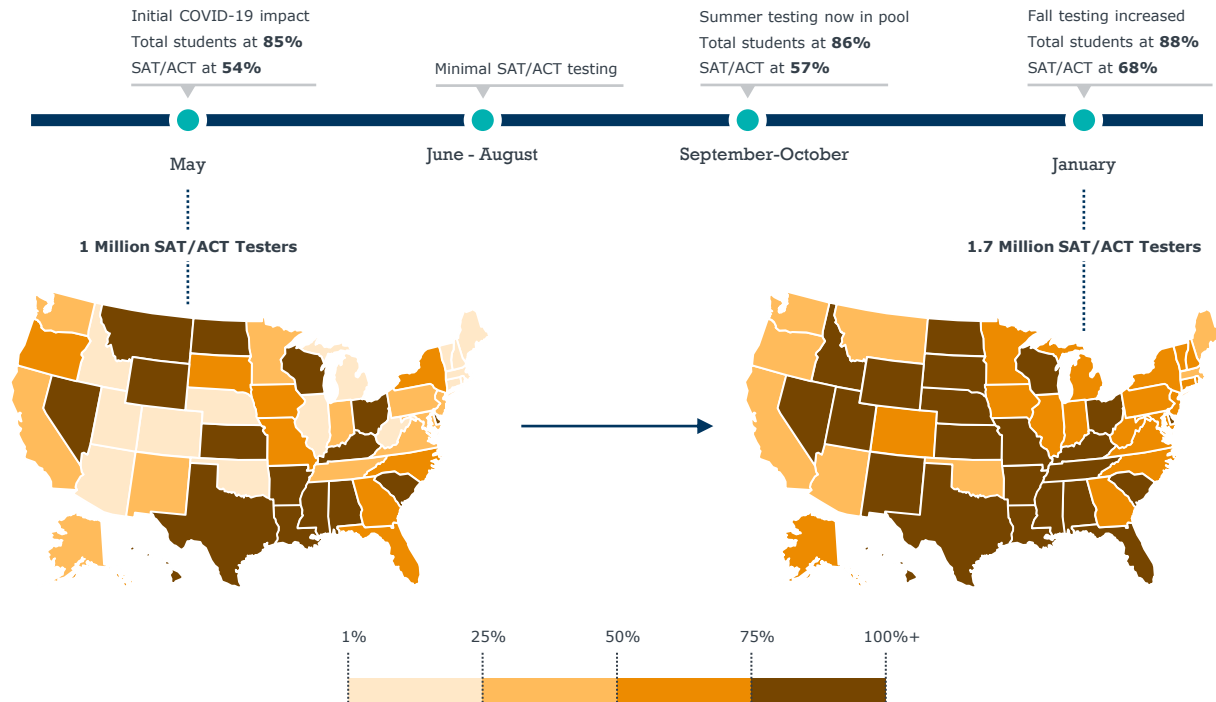
Entering Class 2021

Initial COVID-19 impact
Total students at **85%**
SAT/ACT at **54%**

Minimal SAT/ACT testing

Summer testing now in pool
Total students at **86%**
SAT/ACT at **57%**

Fall testing increased
Total students at **88%**
SAT/ACT at **68%**

May

June - August

September-October

January

1 Million SAT/ACT Testers

1.7 Million SAT/ACT Testers

1%   25%   50%   75%   100%+

College Board Junior Name Availability

Bar chart showing College Board Junior Name Availability:
- EC2021: 1,925,000
- EC2022: 1,535,000
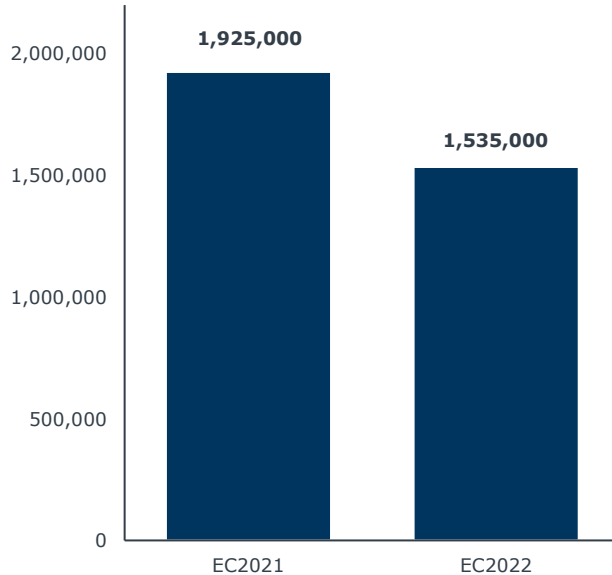
- 22 states at >80%
- 13 states at <70%
- South: 84%
- West/Midwest: 64%

College Board Sophomore Name Availability
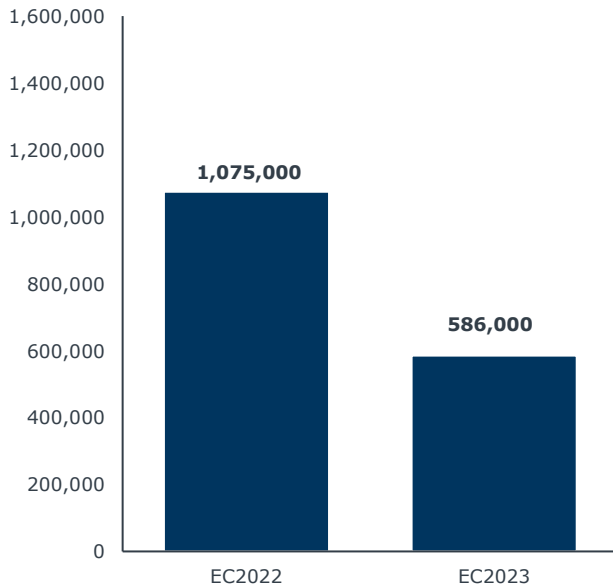
A long-term or a short-term problem?

1. *Is the decline due to a change in student behavior/testing demand or due to current circumstances?*

2. *With improved circumstances, will testing/name availability rebound?*

College Board

- Non-assessment students (over 500,000 students)
- Opt-in blitz
- Subject tests, essays dropped – more focus/flexibility on SAT
- Flexible tests – shorter/digital

ACT

- Alpha/Beta tests for at-home testing
- Section re-testing, expanded online options

NRCCUA / CBSS

- Digital/Electronic survey collection

1   Fall 2021 Enrollment Trends

2   Enrollment Landscape for YSU and List Source Insights

3   **Understanding Trends with Current Freshmen**

4   Decision IQ

Data Collection: December 8, 2020–January 8, 2021

Total Respondents

3,866
2020 high school graduates

College Plans

93%
of respondents are currently enrolled at a college or university

First-Generation Status

First-Generation: **23%**
Non-First-Generation: **77%**

Location

South: **31%**
West: **25%**
Midwest: **22%**
Northeast: **21%**
Outside US: **1%**

Ethnicity

Black: **12%**
Asian/Pacific Islander: **16%**
Hispanic/Latinx: **19%**
Native American: **2%**
White: **61%**

Household Income

$60K or less: **27%**
$61K–$120K: **23%**
>$120K: **22%**
Unknown: **28%**

Source: EAB research and analysis.

Goals and Key Findings of Survey

ONLINE SURVEY EXPLORED

1. Enrollment status

2. Sources used to make enrollment decision

3. Effects of COVID-19 on enrollment decision

4. Applications

5. Student experience

6. Differences by key demographic segments

KEY FINDINGS
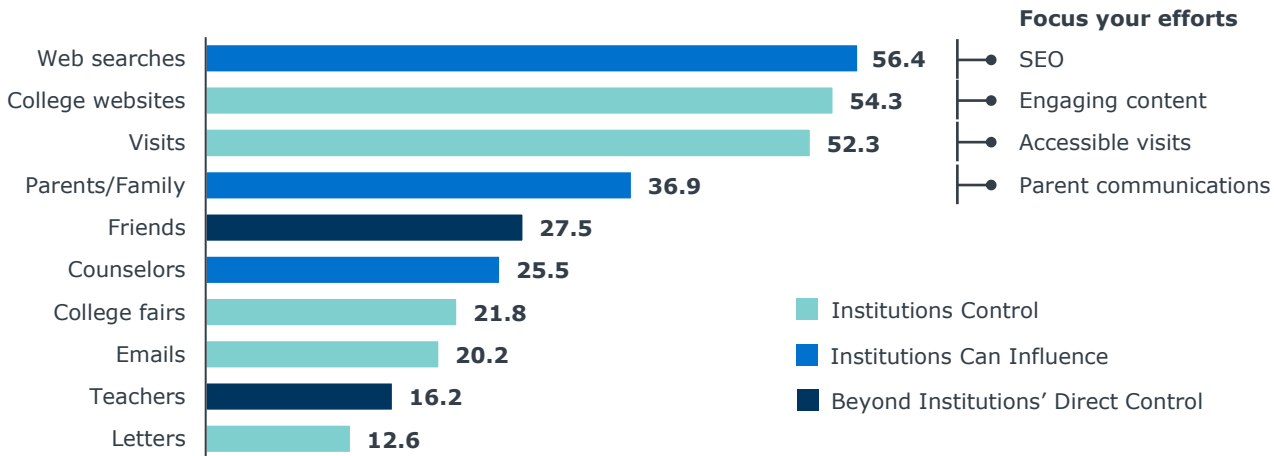
✓ Students are using sources that schools control to make their enrollment decision

✓ Cost and location are the primary drivers for enrollment decisions

✓ A subset of students is delaying enrollment due to COVID-19, but do plan to enroll

✓ Satisfaction with college experience is at a five-year low

✓ DEI efforts are most important for underrepresented students

Students Are Using a Variety of Sources

Students Are Using Sources Mainly Within Your Control or Influence

Q. What sources of information did you rely on most to make your enrollment decision?
(Top-ten sources from a list of 27; participants could select up to five sources)

Focus your efforts

Source	Value	Focus
Web searches	56.4	SEO
College websites	54.3	Engaging content
Visits	52.3	Accessible visits
Parents/Family	36.9	Parent communications
Friends	27.5	
Counselors	25.5	
College fairs	21.8	
Emails	20.2	
Teachers	16.2	
Letters	12.6	

- Institutions Control
- Institutions Can Influence
- Beyond Institutions' Direct Control
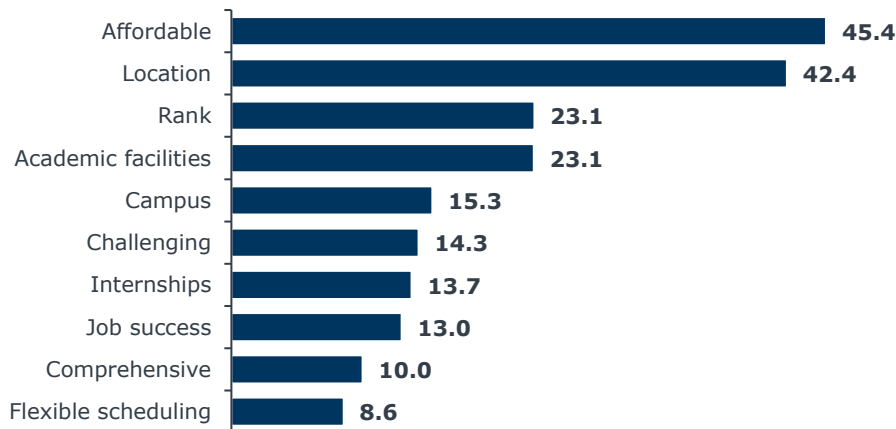
⚠ Institutional Action

Web searches and websites continue to be the sources students find most helpful when making their enrollment decision. A strong website and SEO plan will help the students you know about, and the ones you don't.

Why Students Selected the School Where They are Enrolled

Q. Why did you select the school where you are enrolled?
(Top-ten sources from a list of 20; participants could select up to three reasons)

Reason	Value
Affordable	45.4
Location	42.4
Rank	23.1
Academic facilities	23.1
Campus	15.3
Challenging	14.3
Internships	13.7
Job success	13.0
Comprehensive	10.0
Flexible scheduling	8.6

⚠ Institutional Action

Proactively address what is most important to students:
(1) communicate affordability early, frequently, and consistently
(2) emphasize location benefits, especially for students in your backyard

A Meaningful Percentage of Students Did Not Enroll Due to the Pandemic

7%
indicated they did not enroll in a college or university this fall.

67%
of those who did not enroll indicated COVID-19 was the reason.

Top Pandemic-Related Reasons for Not Enrolling

- The prospect of attending virtually (62%)
- Feeling too much stress/anxiety (49%)
- No longer worth the cost (34%)
- Change in family financial situation (33%)

77%
had a short-list of schools before deciding not to enroll.

72%
plan to enroll later.

- 39% will use the same list for EC 21
- 28% will use a similar short list of schools
- 20% are likely to consider a different set of schools

Institutional Action

Stay engaged with the Entering Class 2020! Sixty-nine percent (69%) of students who indicated they will enroll later will do so within one year.

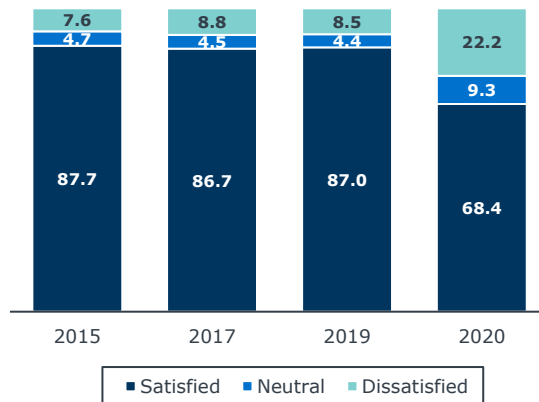Satisfaction With College Experience is the Lowest in Five Years

68%

of students are satisfied with their college experience.

Satisfaction is lowest with students attending:

- Public schools (64%)
- Schools in the West (61%)
- Schools that were all virtual at the beginning of the term (60%) and the end of the term (63%)

Satisfaction dropped significantly in 2020

Year	Satisfied	Neutral	Dissatisfied
2015	87.7	4.7	7.6
2017	86.7	4.5	8.8
2019	87.0	4.4	8.5
2020	68.4	9.3	22.2

■ Satisfied ■ Neutral ■ Dissatisfied

Institutional Action

Retention will be challenging for all institutions, but especially for schools where classes remain all virtual. Students will need to better understand the value of a virtual education. Eight percent of students attending a four-year school indicated they may not continue at the school. Overall lower student satisfaction presents opportunities for transfer recruitment.

Students Value Importance of DEI, But Not All Recognize Their School's Efforts

Q. How important is it to you that your institution has a stated commitment to diversity, equity, and inclusion?

70.3   20.9   5.4   3.4

■ Extremely/Very ■ Moderately/Slightly ■ Not at all ■ Unsure
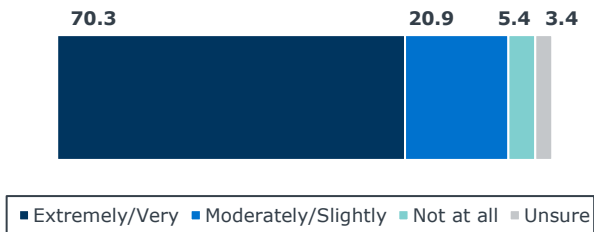
Students placing higher importance on DEI were more likely to be female, first-generation, students from lower-income households, and Black.

Q. In your opinion, and based on your experience to date, has your school built an inclusive community?

76.1   4.3   19.6

■ Yes ■ No ■ Unsure

Students who believe their school has built an inclusive community are more likely to be white and from higher-income households; students who are unsure are more likely to be students of color.

Institutional Action

Keep diversity, equity, and inclusion efforts and communications central to the student experience. Efforts not only help support underrepresented students but also educate students with more privilege to ensure a better student experience for all.

1 Fall 2021 Enrollment Trends

2 Enrollment Landscape for YSU and List Source Insights

3 Understanding Trends with Current Freshmen

4 Decision IQ

Decision IQ Survey

Confirm students' intention of registration and other factors that influence their enrollment decision
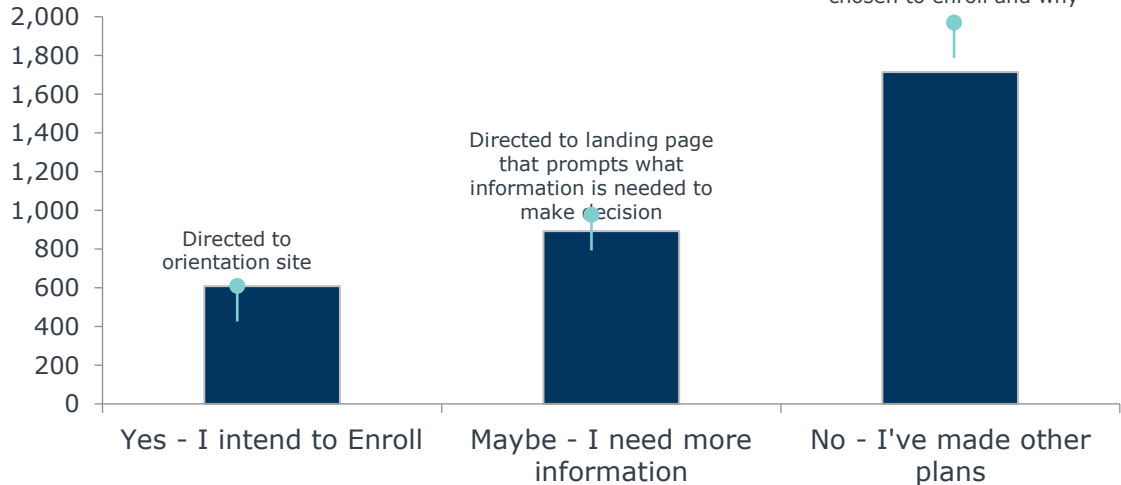
Program Highlights

- ✓ Leverage survey responses and track online performance indicators to triage counselors' follow-up activities
- ✓ Understand students' decision drivers and craft the most effective messaging
- ✓ Derive competitive intelligence from proprietary "no survey"
- ✓ Benchmark your performance against industry trends
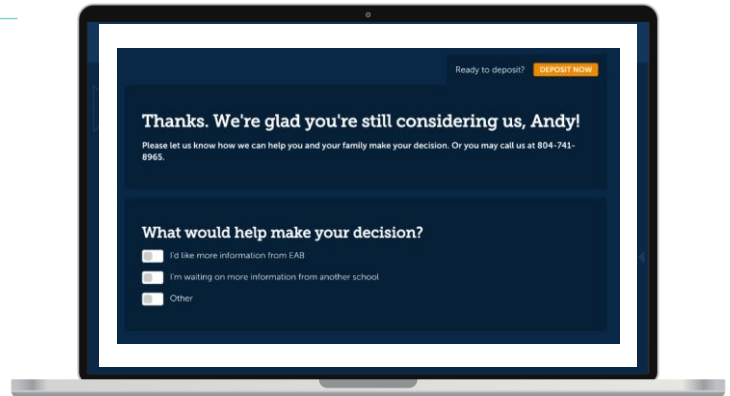
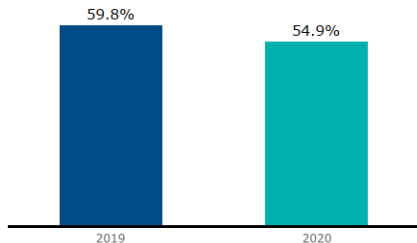# The Decision IQ Survey Helps Identify Student Intentions

Decision Survey Responders by Category
Initial Response

Directed to survey to determine where they have chosen to enroll and why

Directed to landing page that prompts what information is needed to make decision

Directed to orientation site

Category	
Yes - I intend to Enroll	~600
Maybe - I need more information	~890
No - I've made other plans	~1,720

Y-axis: 0 – 2,000 (increments of 200)

Youngstown State University Decision IQ at a Glance

Response Rate

Year	Rate
2019	59.8%
2020	54.9%

Response Distribution: First Response

Category	Dark Blue	Teal
No	31.5%	33.6%
Maybe	17.4%	16.1%
Probably	7.9%	8.0%
Yes	37.6%	29.7%
Already Done	5.6%	12.7%
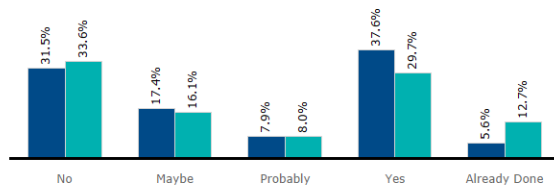
Decision Indicator Rates by First Answer

Category	Dark Blue	Teal
No	0.8%	0.8%
Maybe	14.5%	17.7%
Probably	35.4%	38.0%
Yes	68.0%	79.8%
Already Done	68.7%	87.6%
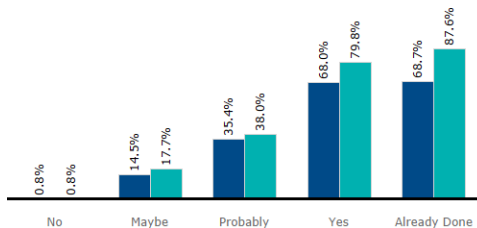
Response Distribution: First vs. Last

Category	Gray	Blue
No	33.6%	40.8%
Maybe	16.1%	11.1%
Probably	8.0%	3.6%
Yes	29.7%	22.8%
Already Done	12.7%	21.7%

Yield IQ
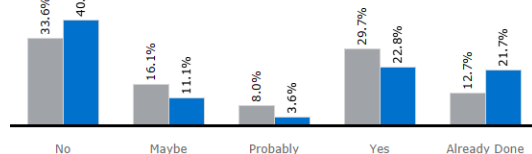
Provides yield scoring for all admitted students by aggregating 150+ variables

Program Highlights

✓ Prescriptive analytics

✓ Benchmarked year-end survey

+ **Yield Enhancement:**

    ✓ Enhanced mix of behavioral data driving model output

    ✓ Provide a more meaningful categorization of admitted students

    ✓ Earlier deployment to provide best available enrollment intelligence
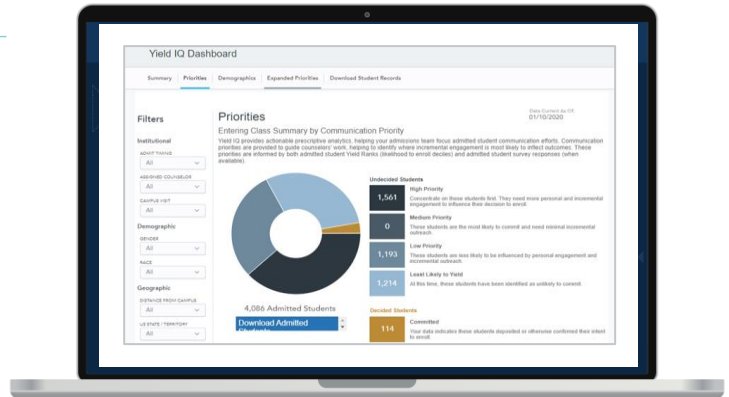
Yield IQ Modeling Process

Leverage your historical entering class data

→

Mine the data for unique predictive factors that impact enrollment

→

Train custom algorithms to predict each admit's relative strength

→

Assign admits to yield groups to inform outreach strategy

Potential Inputs

Student Demographics

Marketing Responses

Application Timing

Financial Aid Information

A+ Academic Quality

Geographic Metrics

Deposit IQ Responses

Campus Visits