



# Market Context and Pandemic Ripples

Youngstown State University

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*Leadership Team Presentation*  
*April 11<sup>th</sup>, 2023*





**We help schools support students from enrollment to graduation and beyond**

➤ **ROOTED IN RESEARCH**

**8,000+** Peer-tested best practices

**500+** Enrollment innovations tested annually

➤ **ADVANTAGE OF SCALE**

**2,100+** Institutions served

**9.5M+** Students supported by our SSMS

➤ **WE DELIVER RESULTS**

**95%** Of our partners continue with us year after year, reflecting the goals we **achieve together**

➤ Find and enroll your right-fit students

➤ Support and graduate more students



➤ Prepare your institution for the future



# Enrollment In Context

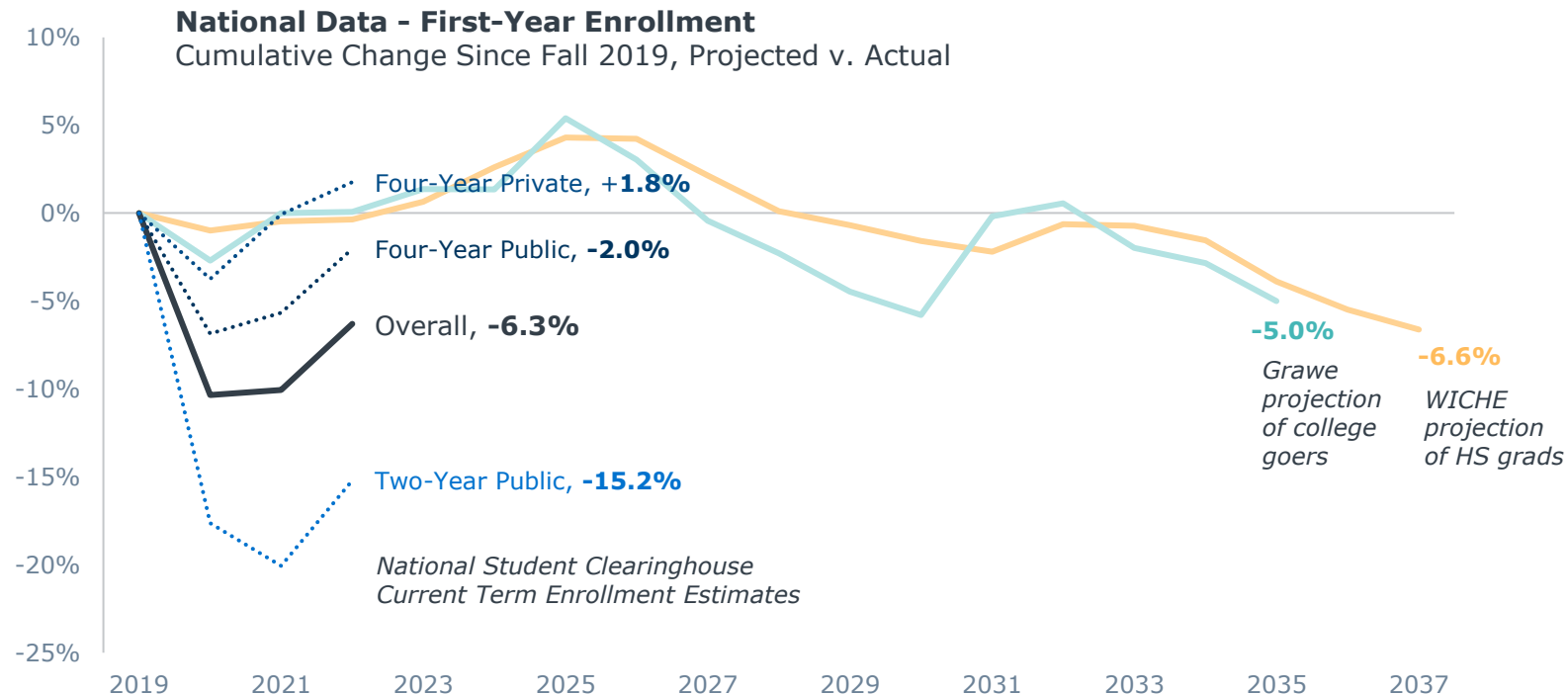
Looking Back and Looking Forward



# Pandemic Enrollment and Beyond



## The Demographic Cliff Is Already Here

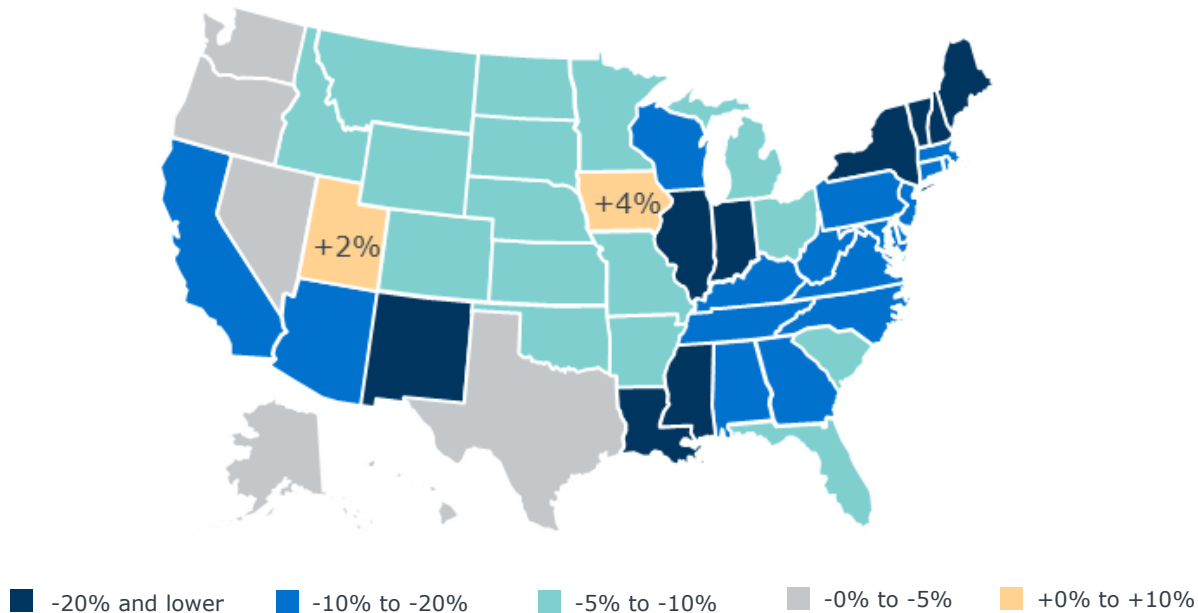


# Nearly Universal High School Student Declines

Falling Birth Rates Will Hit Institutions Across the United States



Percentage of Change in the Population of 18-Year-Olds, 2025–2035



Source: Western Interstate Commission on Higher Education (WICHE), *Knocking at the College Door*, 2016; Grawe, Nathan D., *Demographics and the Demand for Higher Education*, 2017; EAB analysis.

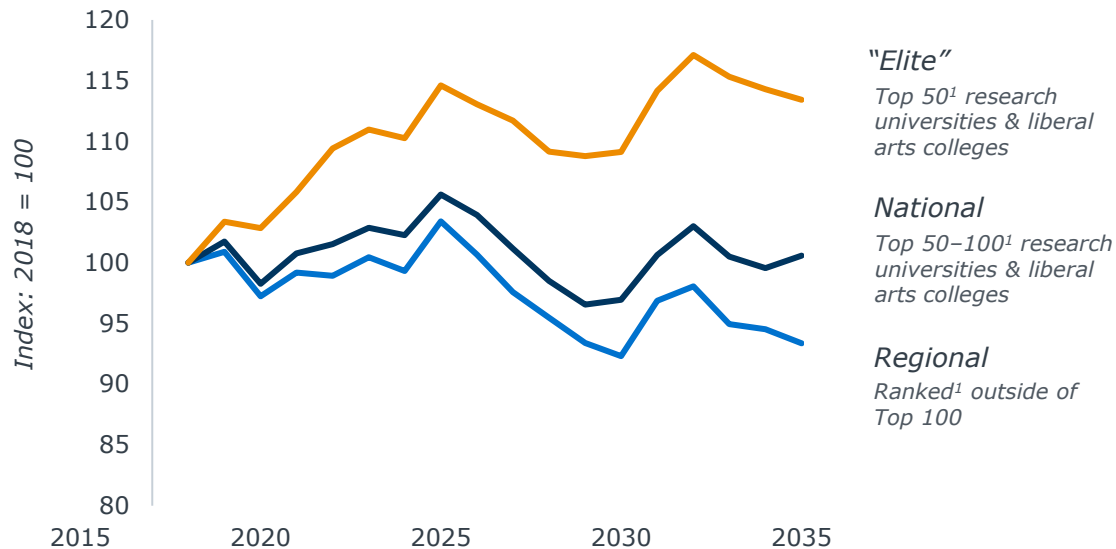
# Demography's Impact Uneven Depending on Segment



## 2025 to 2030 Should Be the Real Focus, as Even Elites Will See Declines

Change in Enrollment Demand 2018 to 2035  
(2018 Projection = 100)

Change in demand



### "Elite"

Top 50<sup>1</sup> research universities & liberal arts colleges

### National

Top 50-100<sup>1</sup> research universities & liberal arts colleges

### Regional

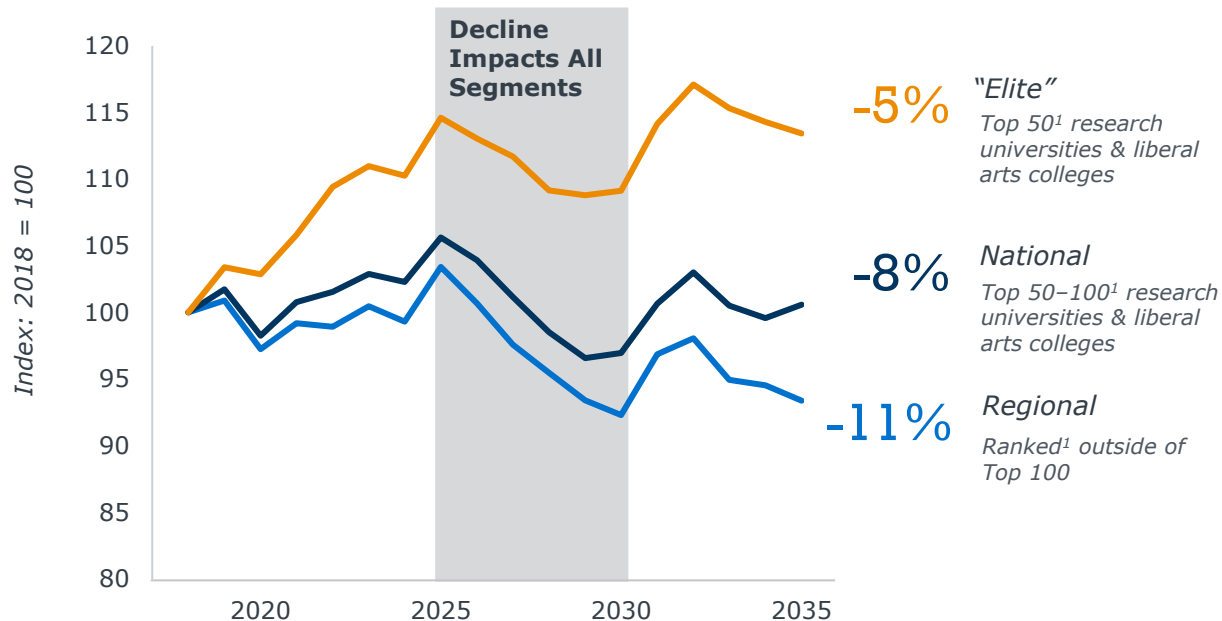
Ranked<sup>1</sup> outside of Top 100

# No Segment Is Safe from Falling Demand 2025-2030



But 2025 to 2030 Should Be the Immediate Focus

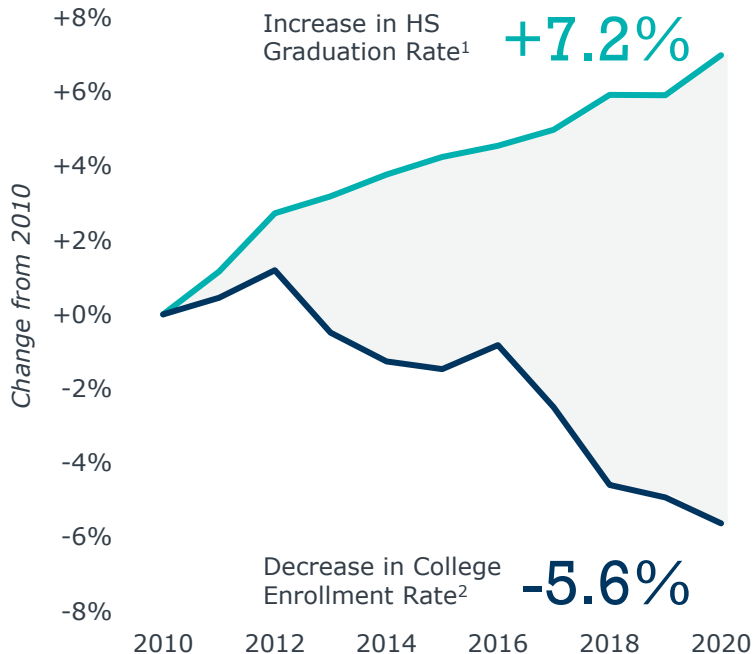
**Change in Enrollment Demand 2018 to 2035**  
(2018 Projection = 100)



# Your Biggest Competition May Be No Institution

## The Non-Consumer Market is Getting Bigger Every Year

Change in Ed. Attainment at 19 (2010 to 2020)



1) Pct. Of total 19-year-olds who have graduated HS

2) Pct. Of HS graduates who have some college experience at age 19

## Pandemic Seems Likely to Increase Nonconsumption

Short-term Disengagement

**+2.3M**

Increase in **Absent Students** Grades 8-12

**17%**

Of seniors **abandoned college plans**

Long-term Barriers

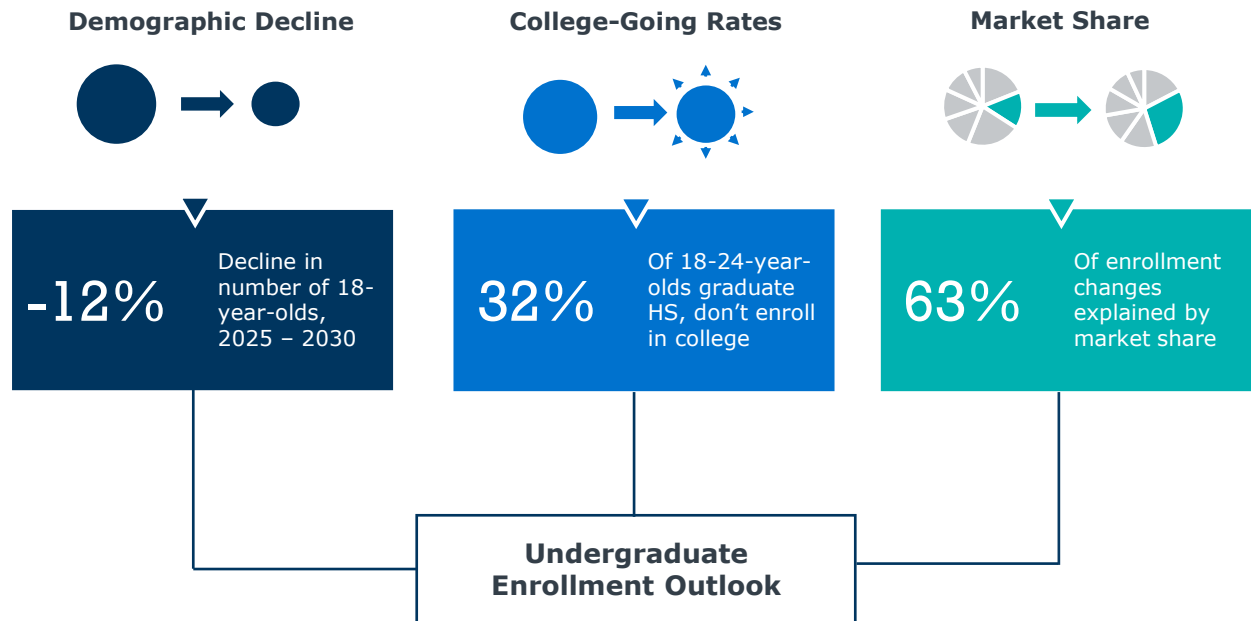
**25%**

Of 3<sup>rd</sup> graders behind in reading **catch up** by end of HS



# Your Enrollment: More Than Demographic Decline

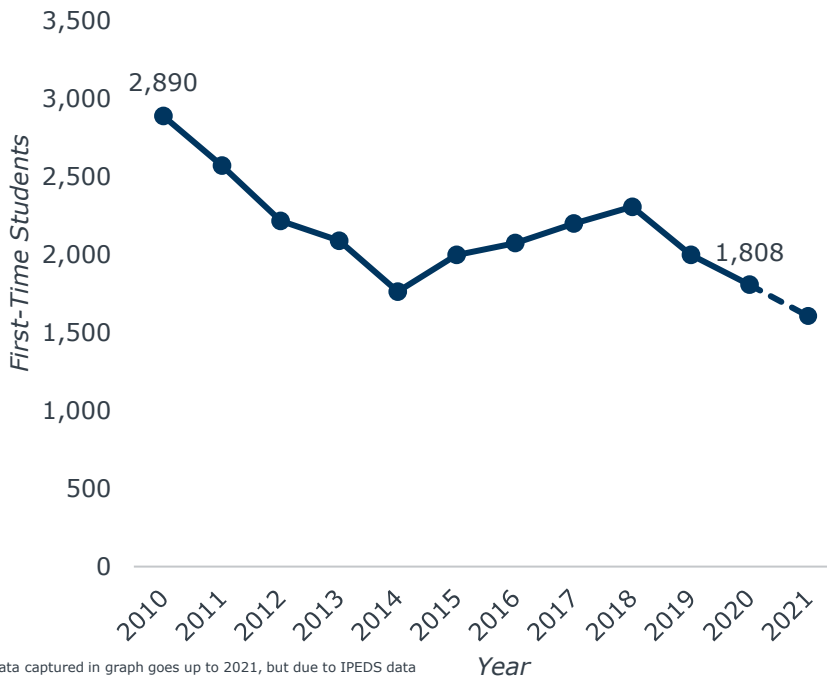
The Critical Threats That Continuously Shape Your Enrollment



# Looking Back to Look Forward

## Where Our Analysis Starts: Historical Enrollments of First-Time Undergrads at Youngstown State University

Fall First-Time Undergraduate Students 2010 to 2021



1) Data captured in graph goes up to 2021, but due to IPEDS data collection limitations, our deep-dive analysis begins in 2020.

### Historical Enrollments

2010-2020<sup>1</sup>

**-1,082** *Students*

**-37%** *Pct. Chg.*

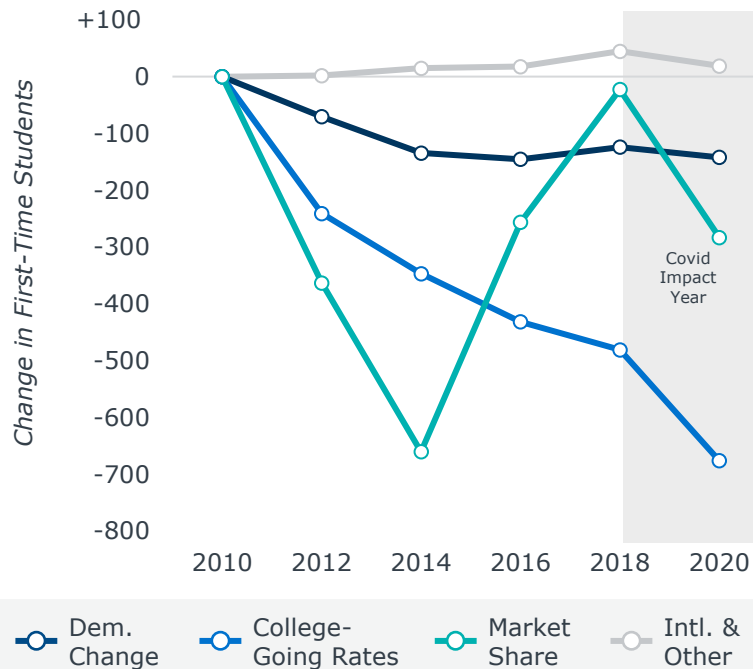
### Included in This Analysis

- Fall first-time degree/for-credit certificate seeking undergrad enrollments
- Full-time and part-time students
- Students who enrolled in college courses during high school

# Which Forces Drove Past Enrollment Shifts?

## How Demographics, College-Going Rates, and Market Share Help Explain Past Enrollment Trends For Youngstown State University

Cumulative Change From 2010 by Enrollment Force



Cumulative Impact of Each Force from 2010-2020

### Demographic Change

**-142** Students

### College-Going Rate

**-676** Students

### Market Share Change

**-283** Students

### International & Unknown Origin

**+19** Students

### Overall Enrollment Change

**-1,082** Students

-37% change from 2010 levels

# YSU's Biggest Competitor is "No College"



## Top 30 Competitors

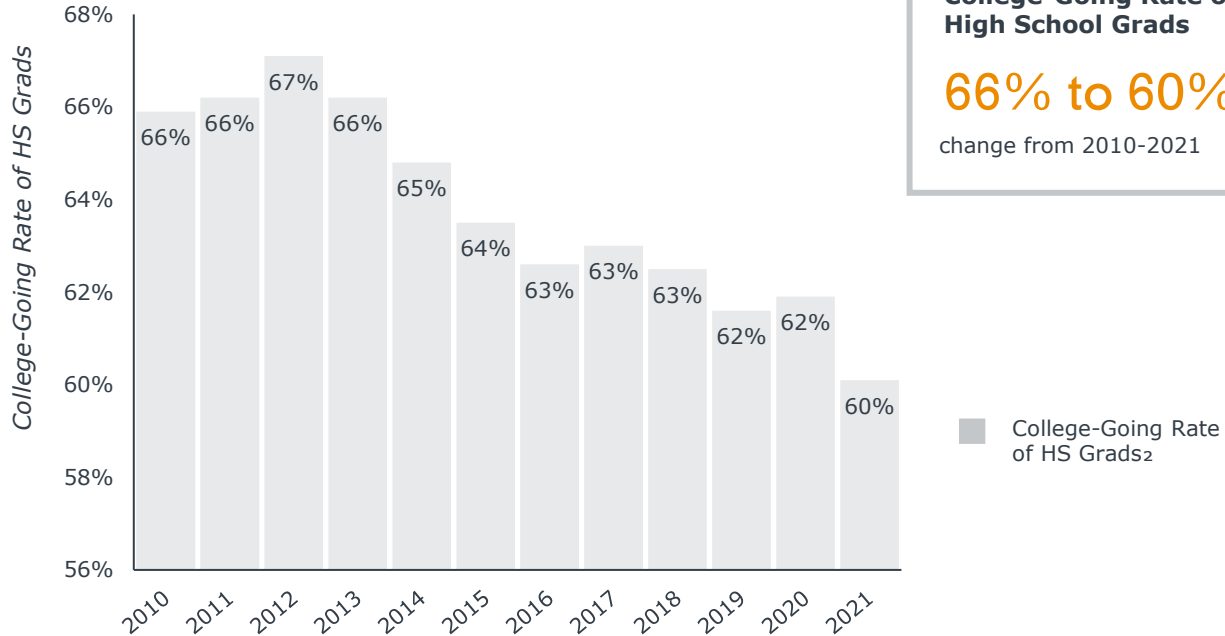
### Top 30 Schools Attended by Non-Enrollees per NSC

|                                |      |               | 2020  | Admit<br>2021 | 2022  |
|--------------------------------|------|---------------|-------|---------------|-------|
| YOUNGSTOWN STATE UNIVERSITY    | OH   | 4 Year Public | 1,775 | 1,217         | 1,189 |
| Unknown/GAP                    | Null | Unknown/GAP   | 1,044 | 1,280         | 1,342 |
| KENT STATE UNIVERSITY          | OH   | 4 Year Public | 309   | 295           | 255   |
| UNIVERSITY OF AKRON            | OH   | 4 Year Public | 132   | 106           | 133   |
| OHIO UNIVERSITY                | OH   | 4 Year Public | 90    | 106           | 101   |
| THE OHIO STATE UNIVERSITY      | OH   | 4 Year Public | 122   | 110           | 90    |
| BOWLING GREEN STATE UNIVERSITY | OH   | 4 Year Public | 76    | 72            | 85    |

# How College-Going Rates Have Changed

## What Percentage of High School Grads From Ohio End Up Enrolling In College?

*HS Grad College-Going Rates for Ohio*



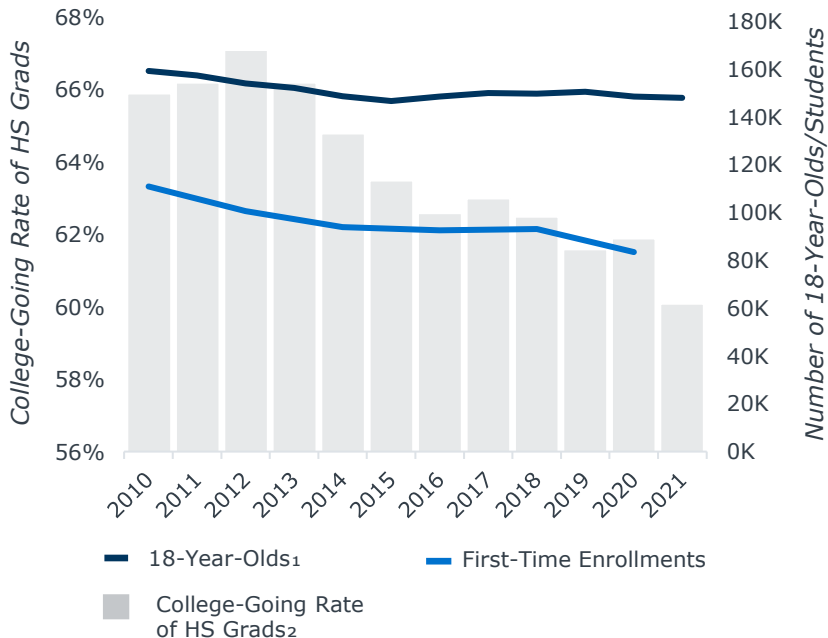
- 1) Estimated using WICHE 10<sup>th</sup> Grade Total Enrollments from 2-Years Previous
- 2) College going rate calculated using representative sample from ACS 2010-2021 1-Year data on state residents 19-24-years old that have graduated high school (GED or equivalent included).

EAB analysis of IPEDS Fall Enrollment by State of Residence Data, American Communities Survey data, WICHE 10<sup>th</sup> Grade Enrollment Data, and National Assessment of Educational Progress data; EAB interviews and analysis.

# Past Non-Consumption in Ohio

## Connecting Historical College-Going Rates To First-Time Enrollment Changes in Ohio

Total 18-Year-Old Population, First-Time Students & HS Grad College-Going Rates for Ohio



### College-Going Rate of High School Grads

**66% to 60%**

change from 2010-2021

### 18-Year-Old Population

**-11,227** Students

-7% change from 2010-2021

### First-Time Students

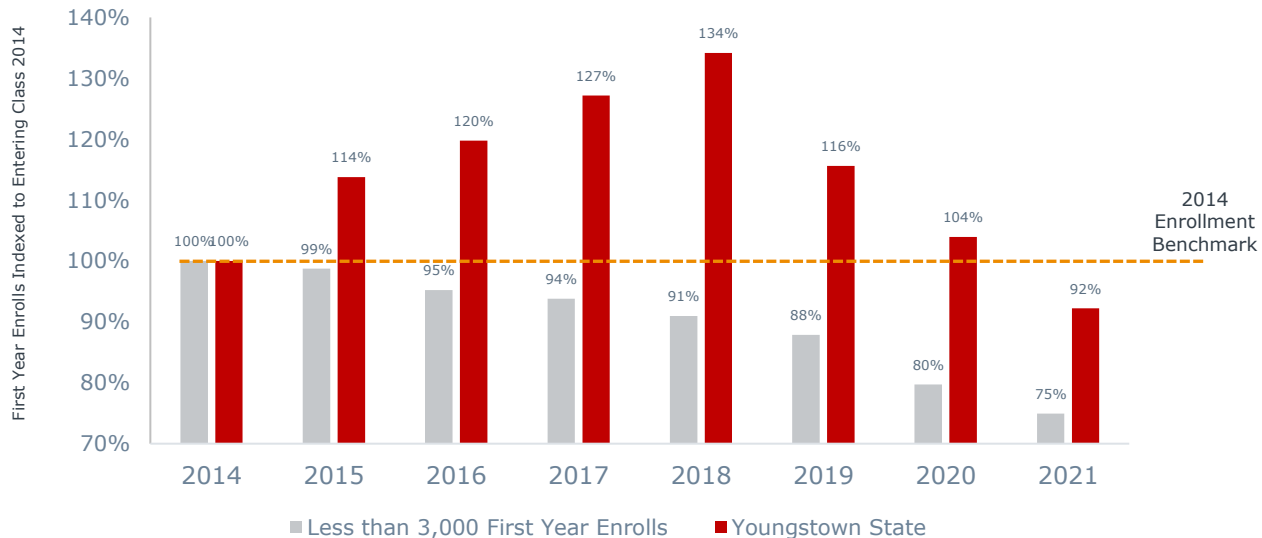
**-27,347** Students

-25% change from 2010-2020

- 1) Estimated using WICHE 10<sup>th</sup> Grade Total Enrollments from 2-Years Previous
- 2) College going rate calculated using representative sample from ACS 2010-2021 1-Year data on state residents 19-24-years old that have graduated high school (GED or equivalent included).

# Youngstown State has outperformed peers since 2014

Youngstown State First Year Enrollment Indexed vs. Public Institutions in OH, IN, IL, PA, and MI  
 Less than 3,000 First Year Enrolls  
 Entering Class 2014 to 2022, Indexed Relative to Entering Class 2014

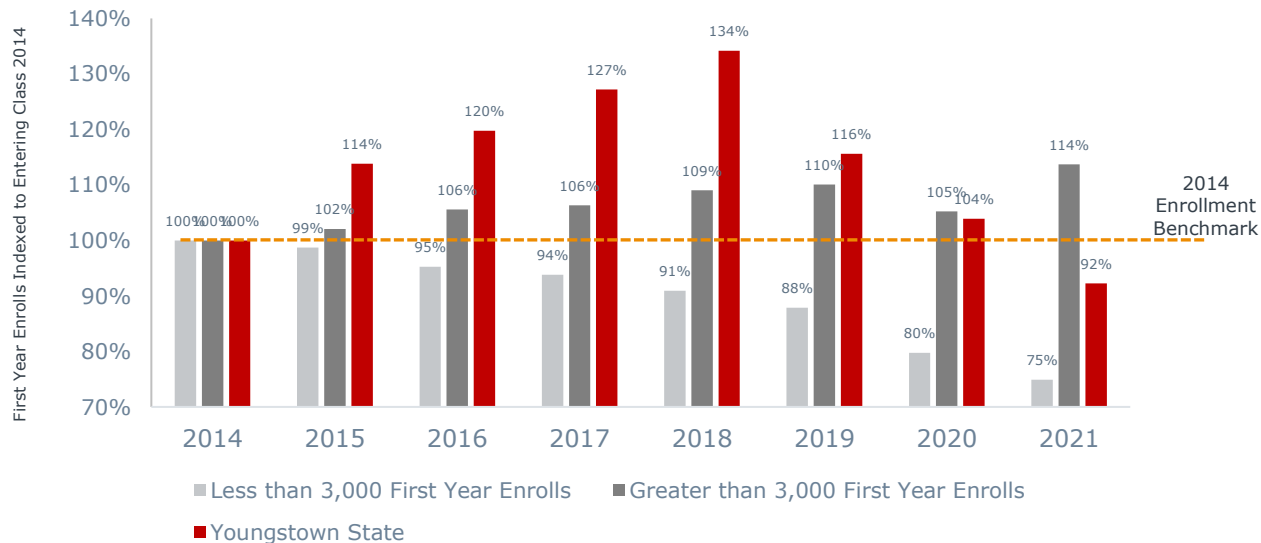


**First Year Enrolls by Entering Class**

|  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  |
|--|-------|-------|-------|-------|-------|-------|-------|-------|
| Youngstown State                         | 1,704 | 1,939 | 2,041 | 2,167 | 2,286 | 1,970 | 1,771 | 1,572 |
| Mkt Avg < 3,000 First Year Enrolls, n=90 | 1,139 | 1,125 | 1,085 | 1,069 | 1,036 | 1,001 | 909   | 854   |

# In recent years, bigger brands have captured greater market share

Youngstown State First Year Enrollment Indexed vs. Public Institutions in OH, IN, IL, PA, and MI  
Entering Class 2014 to 2022, Indexed Relative to Entering Class 2014



## First Year Enrolls by Entering Class

|  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  |
|--|-------|-------|-------|-------|-------|-------|-------|-------|
| Youngstown State                         | 1,704 | 1,939 | 2,041 | 2,167 | 2,286 | 1,970 | 1,771 | 1,572 |
| Mkt Avg < 3,000 First Year Enrolls, n=90 | 1,139 | 1,125 | 1,085 | 1,069 | 1,036 | 1,001 | 909   | 854   |
| Mkt Avg > 3,000 First Year Enrolls, n=16 | 5,050 | 5,155 | 5,332 | 5,369 | 5,506 | 5,559 | 5,315 | 5,742 |

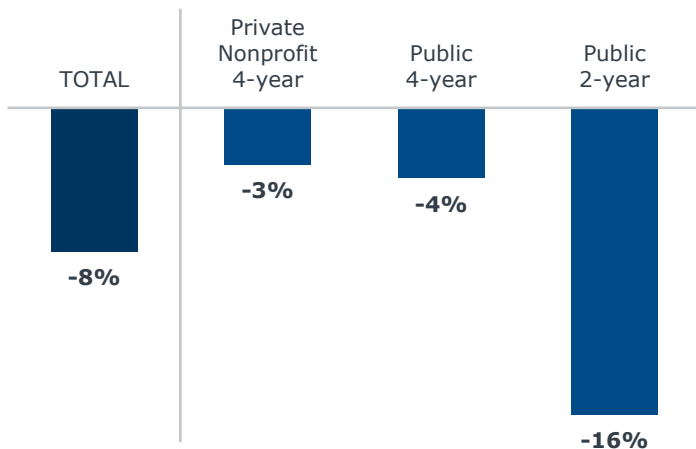


# Pandemic Enrollment Declines

Fall 2019 to Fall 2022



**Change in Total Undergraduate Enrollment by Segment**

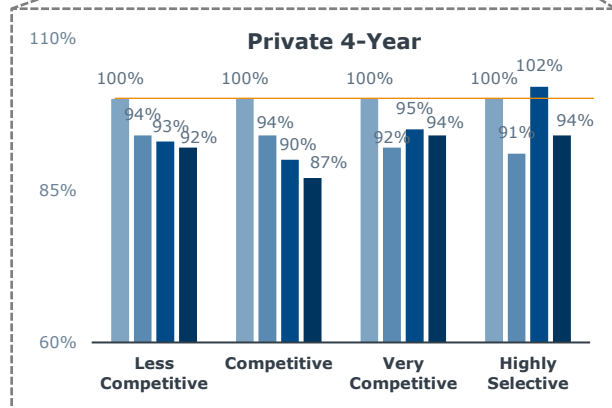
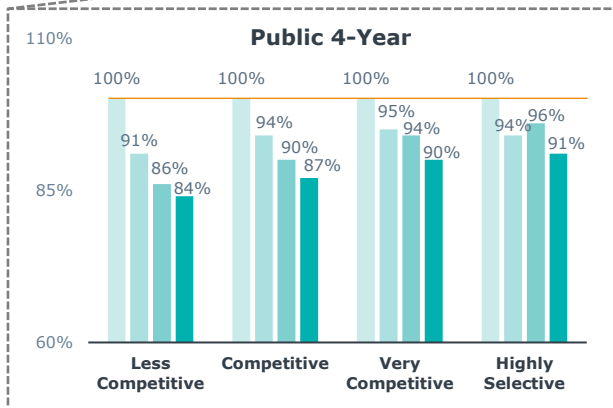
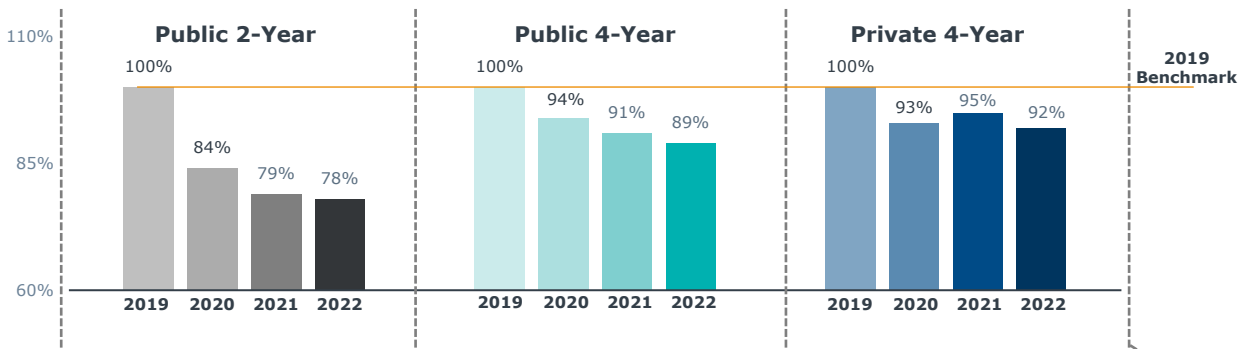


**Change in Freshman Enrollments by Segment**

|                          |        |
|--------------------------|--------|
| Private Nonprofit 4-Year | +1.8%  |
| Public 4-Year            | -2.0%  |
| Public 2-Year            | -15.2% |

Source: National Student Clearinghouse, [Current Term Enrollment Estimates: Fall 2022 Expanded Edition](#).

# Change in First-Year Enrollment by Sector and Selectivity





# Freshman Enrollment Outlook

Macro-Environment Trends to Watch

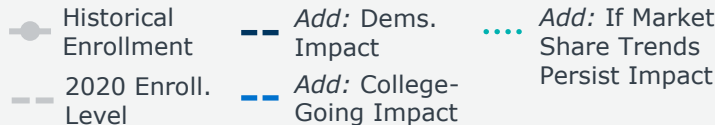
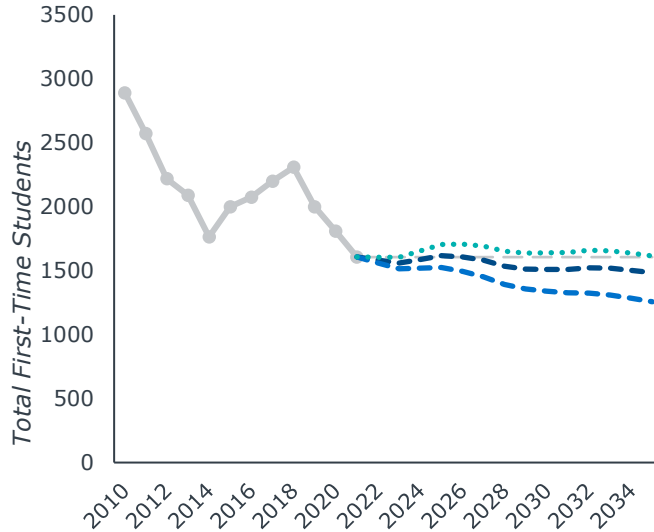




# Building A Baseline Future Enrollment Scenario

## Adding Up Our Projections for Youngstown State University Through 2035

Cumulative Estimates for Demographics, College-Going Rates, and if Market Share Trends Persist



**Add: Demographics Impact**  
**-122** Student Change

+

**Add: College-Going Rate Impact**  
**-226** Student Change

+

**Add: If Market Share Trends Persist**  
**+357** Student Change

=

**Overall Projected Change by 2035**  
**+8** Student Change

Source: EAB Analysis of IPEDS Fall Enrollment Data, WICHE Knocking at the College Door Data, and American Community Survey Data; Grawe, Nathan, *The Agile College* (Data file); EAB Interviews and Analysis.



# New Aid Formulas Present Disruption, but Meaningful Pell Opportunity

## Notable Changes

- ▶ The FAFSA will be **considerably shorter**
- ▶ The FAFSA will rely almost exclusively on information from a **family's recent tax return**
- ▶ Expected Family Contribution (EFC) will become the **Student Aid Index (SAI)**
- ▶ Potential for **Negative Student Aid Index (SAI)** up to 1,500

## Key Updates:



Notable increase in number of Pell Grant recipients (10%-20%)



New SAI will no longer take families with multiple students in college into account



Small business/farm owners will have those assets considered in SAI calculation

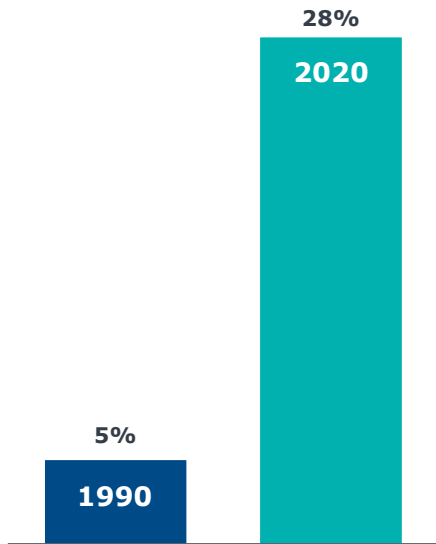


# Many Markets Becoming ‘Winner(s)-Take-Most’

Superstar Firms Outcompete, Consolidate Market Power Across Industries

## Top 50 Firms Now Worth Almost 30% of Global GDP

Stock Market Value to GDP Ratio



## Consolidation Comes for Every Industry

US market share of largest three firms

Pharmacies & Drug Stores



Home Improvement Stores



75% of US industries have experienced concentration over past two decades

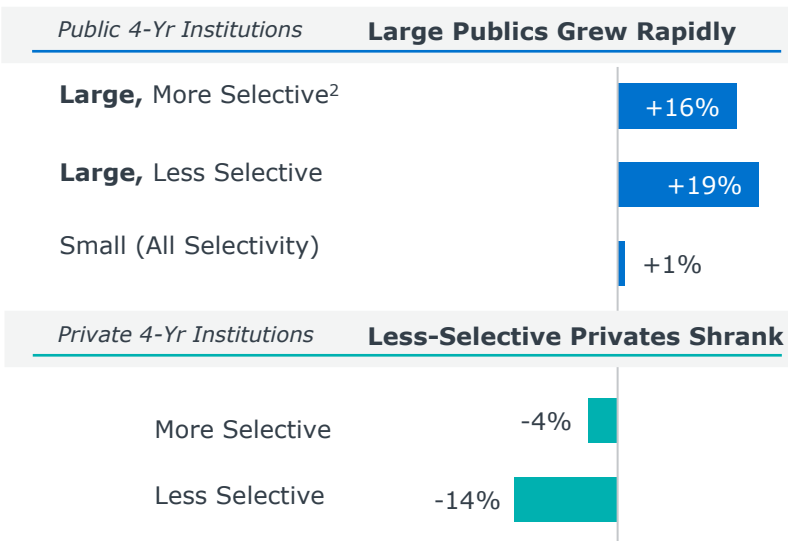
Source: Bloomberg, "World-Dominating Superstar Firms Get Bigger, Techier, and more Chinese," May 2021 ([link](#)); Grullon et al., "Are US industries becoming more concentrated?" *Review of Finance*, July 2019; Open Market Institute; EAB interviews and analysis.

# Ultra-Winners Come to Higher Ed?

Instead of 'Disrupting' Concentration Reshaped the Market

## Pandemic Accelerated UG Enrollment Flight to Larger Institutions

Percentage Change in UG Enrollments<sup>1</sup> 2012 to 2020



## Concentrated Growth in Research, Endowment Funds



# \$27.6B

in federal research funding was allocated **to the top 50 institutions in FY2020** (compared to \$18.5B for all other institutions)



# 19%

of institutions hold 83.7% of all endowment assets<sup>1</sup>

1) Of institutions that responded to a national survey.



- 1. You have agency to build marketshare**
- 2. YSU is well-positioned to manage FAFSA changes**
- 3. Most severe pressure is on regional *privates***
- 4. Your academic mix and tuition positioning are favorable**
- 5. Demography improves a bit in 2030**
- 6. College-going rate may have bottomed out**
- 7. A strong staff and enrollment operation**
- 8. Sophisticated marketing to students and parents**



# The Pandemic Ripple Effects

A Long-Term Perspective on Student Success Following the Pandemic  
and What Actions You Can Take Now



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**KEEP HOPING  
FOR A RETURN  
TO THE PAST**

**BUILD A NEW  
EXPERIENCE FOR  
TOMORROW**

# RIPPLE 1

# UNFINISHED K-12 LEARNING

# Unfinished K-12 Learning

Disruptions Could Ripple Through Education for Years, but It's Far Too Early to Know the Extent

**Class of 2023**  
High School Seniors

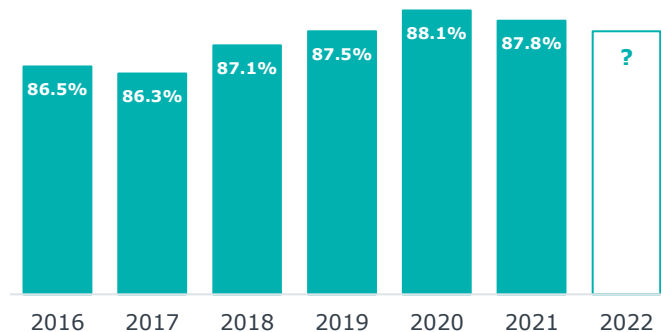
## Critical Milestones



**High School  
Graduation**

## High School Graduation Rate Held Steady... Again

Brookings Institute



## However...

- 1 States reduced requirements
  - Credits
  - Testing
  - Attendance
- 2 Teachers made accommodations
- 3 College-going fell
  - 2YR down **16%**
  - 4YR down **6%**

Source: Brookings Institute, [How Has the Pandemic Affected High School Graduation and College Entry?](#); Curriculum Associates, [The State of Student Learning in 2022](#);

Elaine Allensworth and John Q. Easton, *The on-track indicator as a predictor of high school graduation*, UChicago Consortium on School Research, 2005; Ann E. Casey foundation (2010), *"Early Warning: Why Reading by the End of Third Grade Matters"*; EAB interviews and analysis.

# Unfinished K-12 Learning

Disruptions Could Ripple Through Education for Years, But It's Far Too Early to Know the Extent

**Class of 2023**  
High School Seniors

**Class of 2027**  
Eighth-Graders

## Critical Milestones



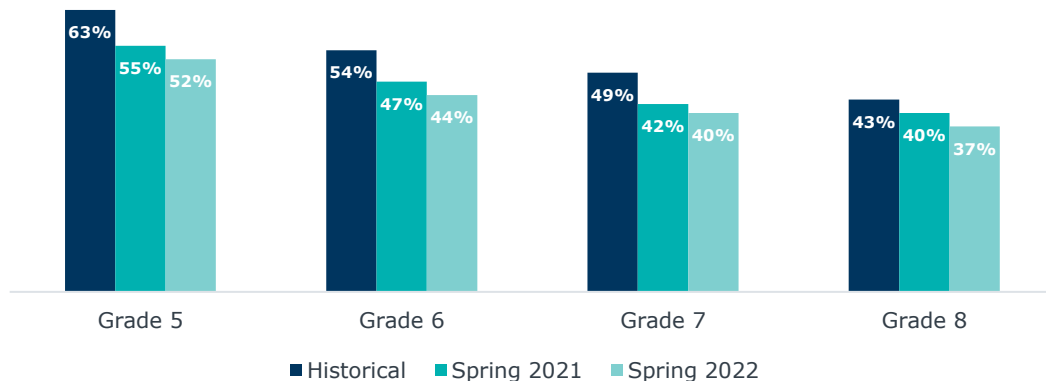
**High School  
Graduation**



**High School  
Algebra**

## Foundational Math Further Declined in 2022

Percentage of Students Achieving Fundamental Math Skills



Source: Brookings Institute, [How Has the Pandemic Affected High School Graduation and College Entry?](#); Curriculum Associates, [The State of Student Learning in 2022](#);

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# Unfinished K-12 Learning

Disruptions Could Ripple Through Education for Years, but It's Far Too Early to Know the Extent

**Class of 2023**  
High School Seniors

**Class of 2027**  
Eighth-Graders

**Class of 2032**  
Third-Graders

## Critical Milestones



**High School Graduation**



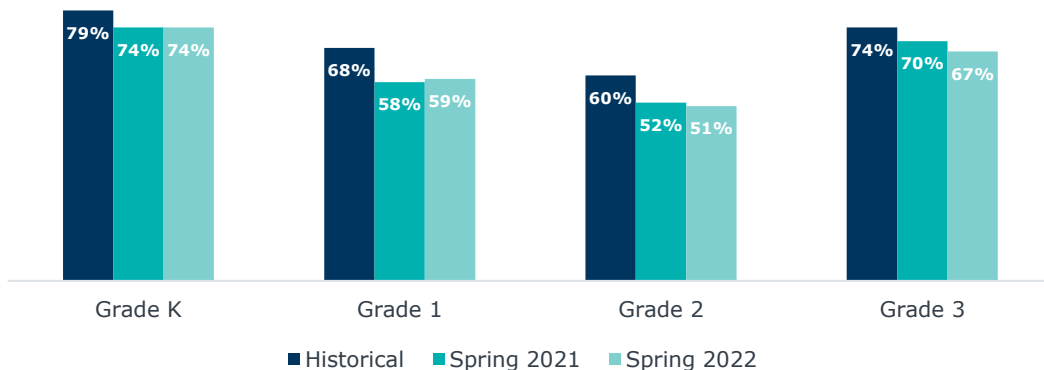
**High School Algebra**



**3<sup>rd</sup> Grade Reading**

## Early Reading Showed No Improvement in 2022

Percentage of Students Achieving Fundamental Reading Skills



Source: Brookings Institute, [How Has the Pandemic Affected High School Graduation and College Entry?](#); Curriculum Associates, [The State of Student Learning in 2022](#);

Elaine Allensworth and John Q. Easton, *The on-track indicator as a predictor of high school graduation*, UChicago Consortium on School Research, 2005; Ann E. Casey foundation (2010), ["Early Warning: Why Reading by the End of Third Grade Matters"](#); EAB interviews and analysis.

## RIPPLE 2

# STUDENT MENTAL HEALTH

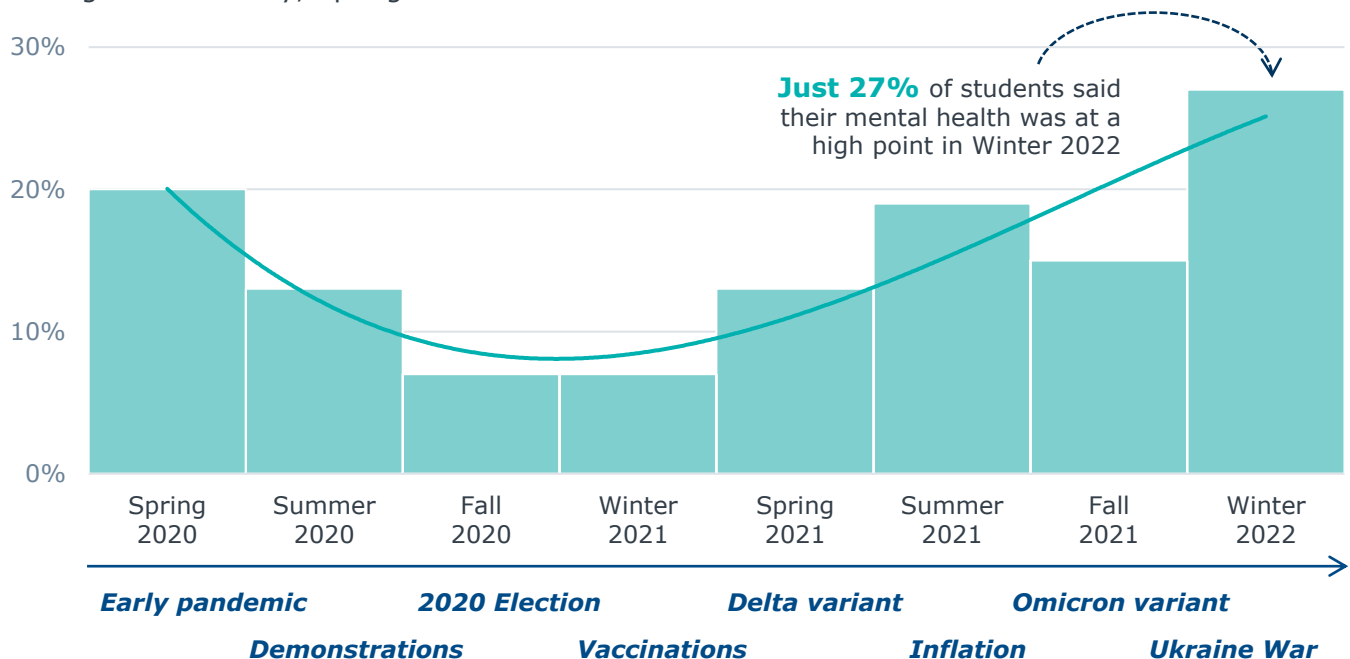


# How Has Student Mental Health Changed?

Trending Upward, but Most Students Still Not Feeling Their Best

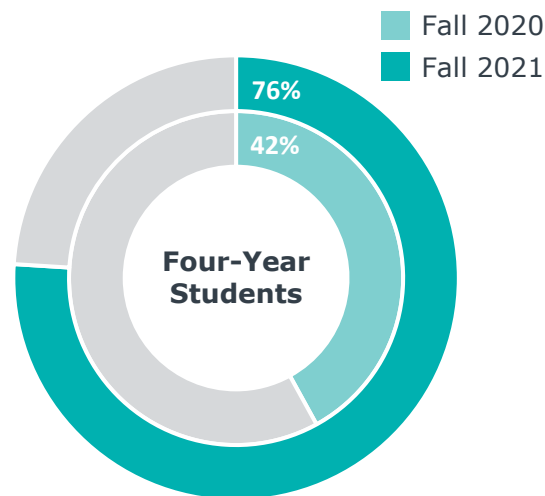
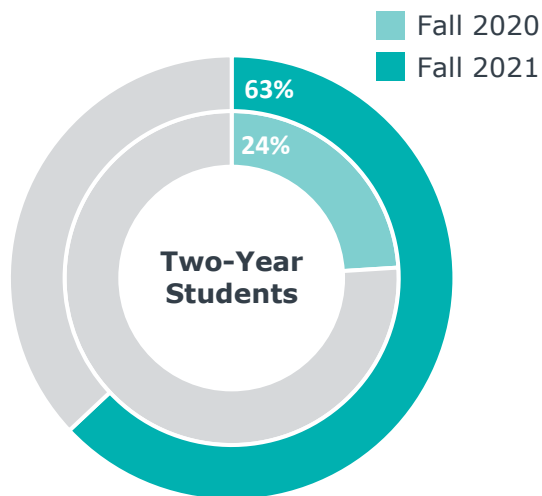
## When was your overall mental health the best?

College Pulse Survey, Spring 2022

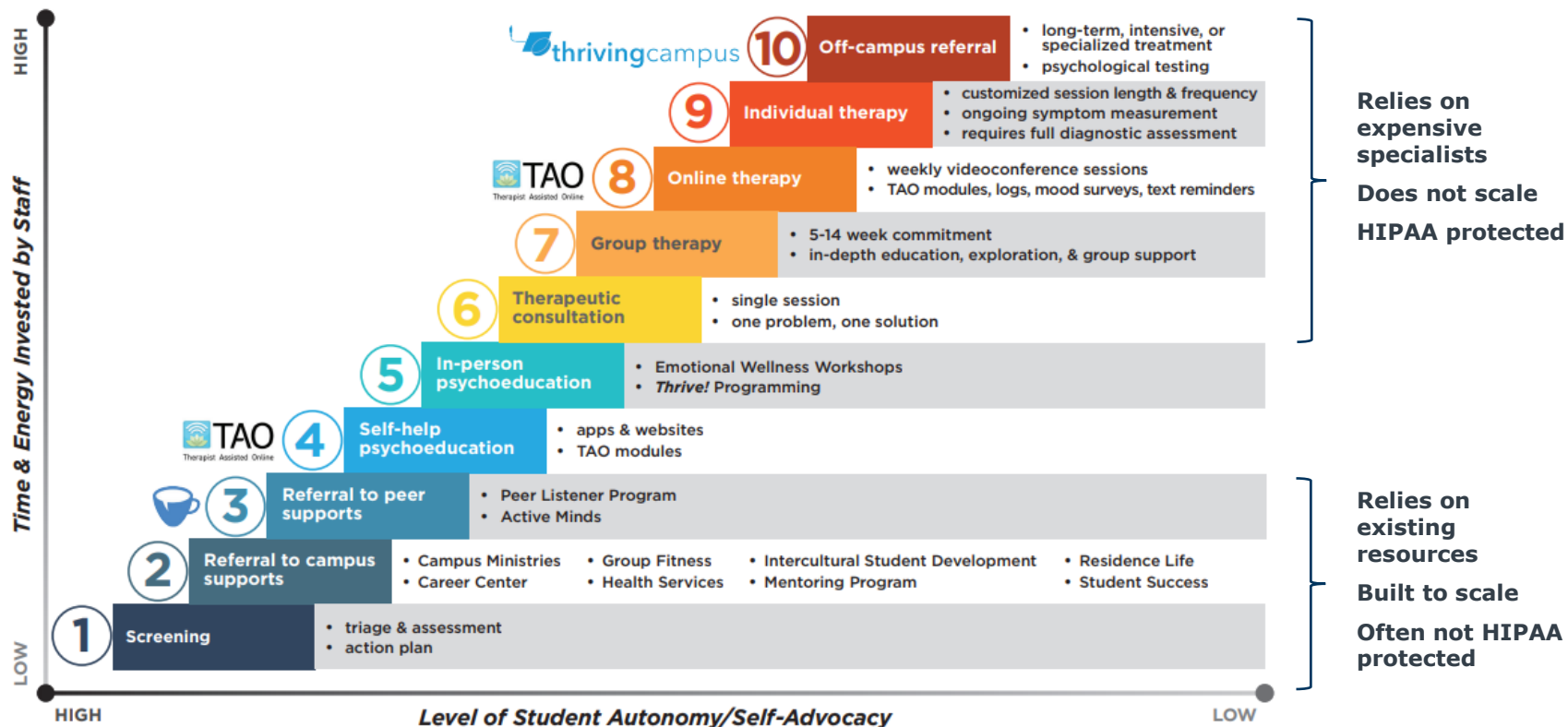


## In the Past 6 Months, Have You Considered Stopping-Out Due to Emotional Stress?

*Gallup/Lumina Survey*



# Stepped Care Model



## RIPPLE 3

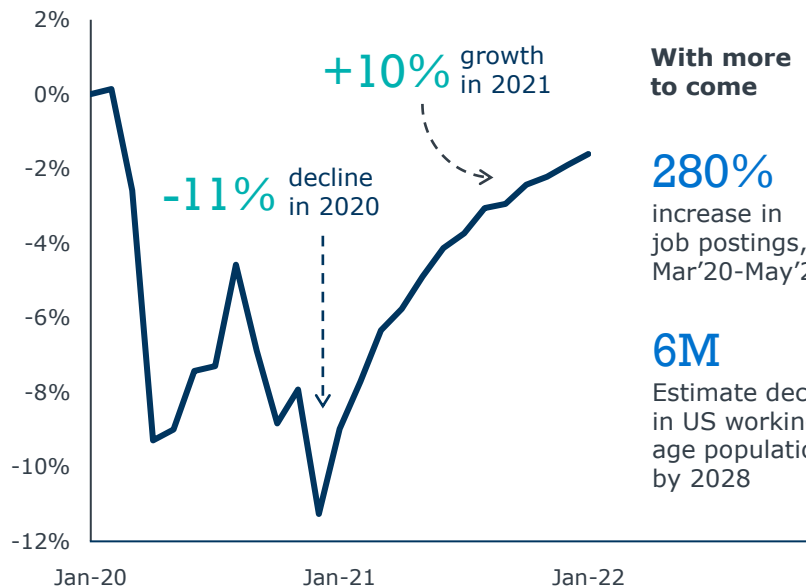
# STAFFING TURNOVER

# The Great Resignation

## Extreme Levels of Employee Turnover Leaving Student Success Managers Struggling to Keep Up

### Employee Turnover in Higher Education

Percentage change in total employees, seasonally adjusted



### Staff Exploring Out-of-Sector Options

|                               |     |
|-------------------------------|-----|
| Another Higher Ed Institution | 68% |
| Private For-Profit Company    | 64% |
| Non-Profit Outside Higher Ed  | 51% |

### Student-Facing Staff Suddenly Very Mobile

- ▶ Staff have transferable skills in high demand
- ▶ Competency-based hiring reduces barrier to entry
- ▶ Industry offered better salary and flexibility

# Speculating About the Future

## When Will We Feel the Ripples?



Demographic cliff intensifies

Enrollment and Equity

Virtual High School

Transfer Enrollment

Student Mental Health

Impact of Unfinished Math

Impact of Unfinished Reading

# Preparing for the Ripples

Extend Impact of Limited Staff Capacity with a Technology-Enabled Coordinated Care Network

## Post-Pandemic Students



Students



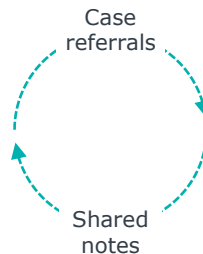
## Advising, Faculty, and Outreach Teams



Frontline Support



Self-Serve Technology



## Support Offices and Essential Services



Academic Support



Financial Aid



Career Center



Residence Life



Athletics



Other Services



Data on student needs, barriers, attitudes, and performance



Data on appointments, communications, and other interactions



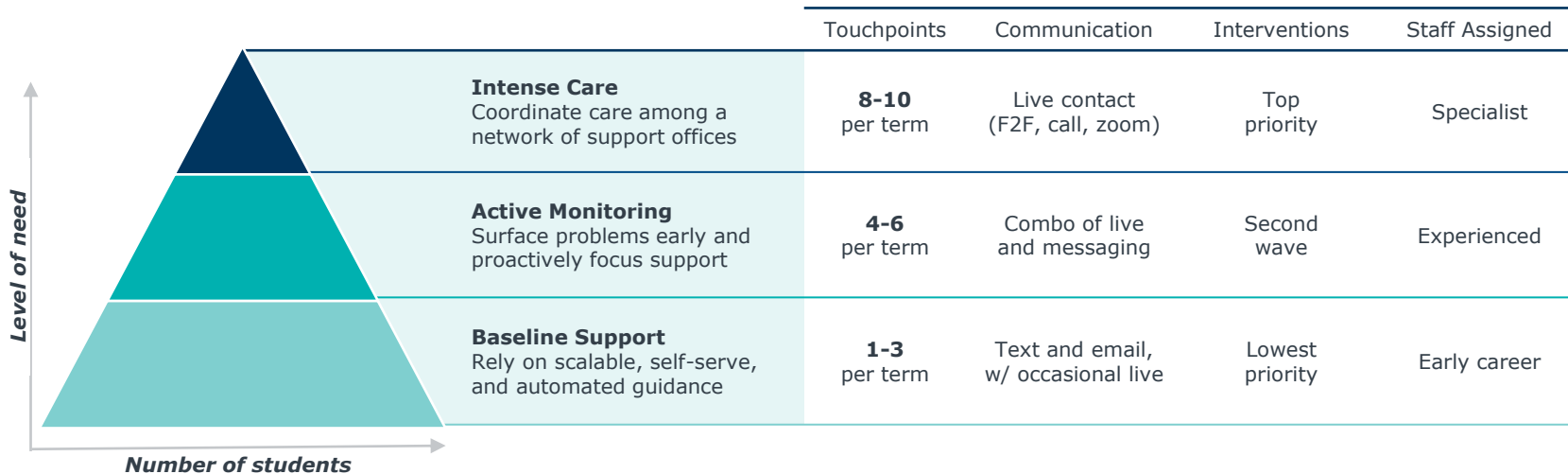
Data on the accessibility, scope, and impact of support services

# Rebalance Support with Differentiated Care



A More Efficient Way to Organize Staff and Provide Better Support

## A Few Different Ways You Can Rebalance Efforts



**More Equitable Support**  
Student needs are met with customized support rather than a "one size fits all" approach



**Staff Time Savings**  
Time is allocated based on the degree of student need rather than standard expectations



**Cost Savings**  
Scalable support is focused on the entire population, while expert and in-depth care only on those in need



# Strengthening Your Early Warning System

Essential Investments to Prepare for Supporting Elevated Academic Needs in the 2020s





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