



INSTITUTIONAL PREFERENCE SURVEY

Prepared for State University of New York
College at Old Westbury

March 2022

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INTRODUCTION

INTRODUCTION

OVERVIEW

In this report, Hanover Research presents the results of the Institutional Preference Survey conducted on behalf of the State University of New York College at Old Westbury (SUNY OW).

KEY OBJECTIVES

- Identify factors that contribute to students' enrollment decisions.
- Determine which competitors non-matriculants have ultimately chosen and what guided these enrollment choices.
- Evaluate the impact of COVID-19 on students' higher education plans for the Fall 2021 term.

SURVEY ADMINISTRATION & SURVEY SAMPLE

- The survey was administered online in January and February of 2022 using the Qualtrics online survey platform.
- Respondents were recruited via a contact list provided by SUNY OW.
- The analysis includes 213 responses following data cleaning.
- This report presents results primarily displayed in aggregate, with select findings segmented by matriculant status (i.e., matriculant or non-matriculant) and applicant type (i.e., first-year or transfer). The accompanying data supplement includes additional segmentations by age, Net Promoter Score (NPS), and COVID-19 impact.

RESPONDENT QUALIFICATIONS

- Must have applied to, and been accepted by, SUNY OW for the Spring 2020, Fall 2020, Spring 2021, or Fall 2021 terms.

INTRODUCTION

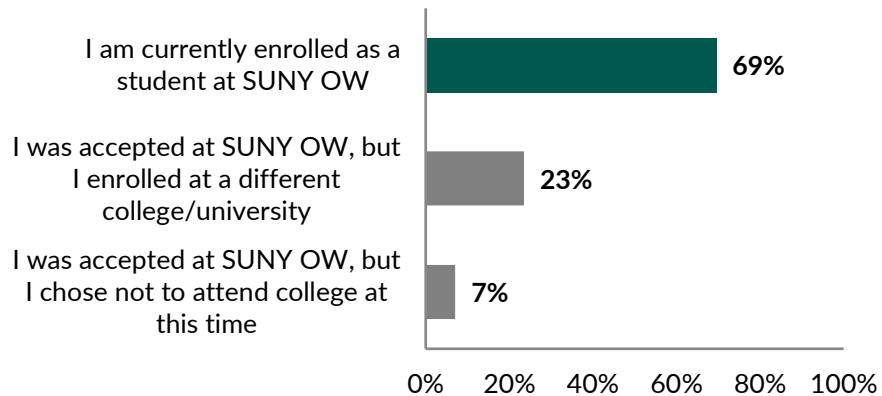
METHODOLOGY

- Sample sizes vary across questions, as some questions only pertain to a subset of respondents.
- When interpreting this report and the data supplement, conclusions drawn from a small sample size ($n < 20$) should be interpreted with caution.
- For full aggregate and segmented results, please consult the accompanying data supplement.
- Statistically significant differences (95% confidence level) between groups are indicated by superscript notation (^{A,B}).
- After data collection, Hanover identified and removed low-quality respondents.
- “Don’t Know” or “Not Applicable” responses, and equivalent, are often excluded from the figures and analysis in order to focus on respondents who did express an opinion.
- Data labels for values less than 5% are removed from some figures to improve legibility.
- Question text and answer options marked with † are truncated for clarity and brevity. For the full text, please consult the data supplement.

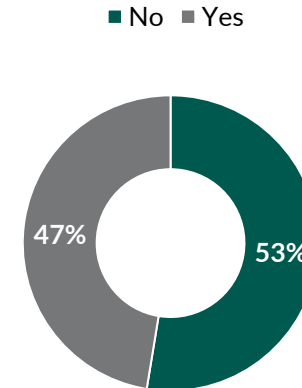
SURVEY SAMPLE

SURVEY SAMPLE

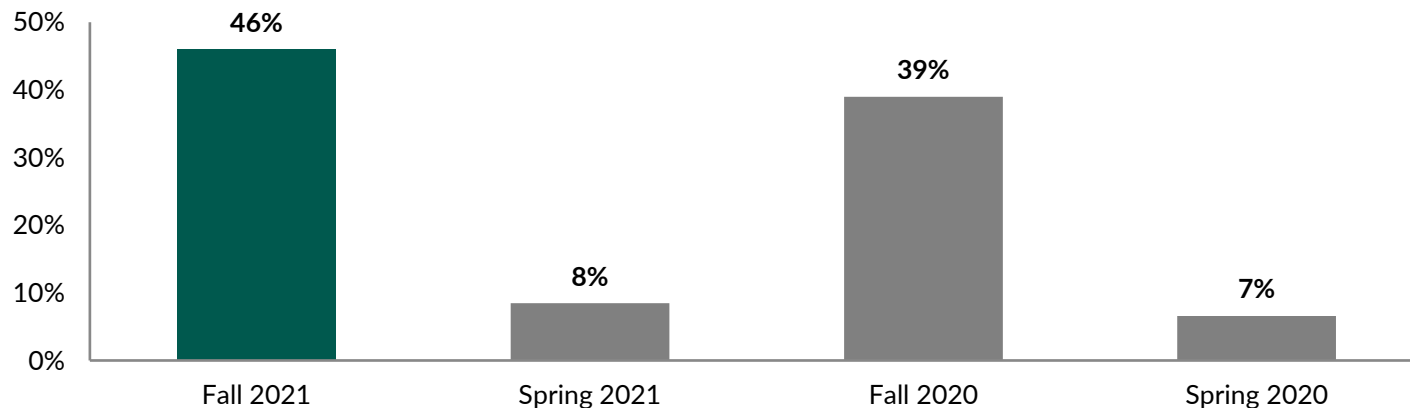
Which of the following best describes your relationship to State University of New York College at Old Westbury (SUNY OW)? (n=213)



Did you apply to SUNY OW as a transfer student from another college or university? (n=213)



For which term did you apply to SUNY OW? (n=213)



RECOMMENDATIONS

RECOMMENDATIONS



Optimize financial aid awards and communication to improve yield among non-matriculants. Financial aid is the most influential factor in non-matriculants' decision where to apply. Indeed, non-matriculants are significantly more likely than matriculants to rank financial aid among the top five factors affecting their application decisions. Despite the importance of aid in non-matriculants' decisions, roughly one-third of these respondents are unsure what their annual out-of-pocket cost would have been at SUNY OW. Further, non-matriculants are significantly less likely than matriculants to rate SUNY OW's financial aid packages favorably, and just under half of non-matriculants would have enrolled at SUNY OW if they had received a stronger financial aid offer. These trends suggest that SUNY OW should improve financial aid communications to ensure that students are aware of their expected out-of-pocket cost. Additionally, SUNY OW should conduct further research into its enrollment funnel and sensitivity to financial aid among specific types of applicants (e.g., Financial Aid Optimization Analysis) to better target aid awards and support yield.



Identify academic interests among non-matriculants and the other institutions they consider for such programs to better convey SUNY OW's academic fit. Among both non-matriculants and transfer students, the degree to which an institution is a good fit for what they intend to study is the most cited influencer of their enrollment decisions. Yet, only about half of non-matriculants rate SUNY OW highly in terms of its alignment with their academic interests. When asked where they enrolled, more than two-thirds of non-matriculants indicate that their chosen institution is not among tested competitors. SUNY OW should identify programs of interest among non-matriculants, as well as its direct competitors for these programs, to improve marketing messaging and differentiation among these offerings.

RECOMMENDATIONS



Highlight SUNY OW's affordability, value for the cost, and overall quality in marketing collateral. Cost and affordability are salient considerations among survey participants. Nearly two-thirds of respondents indicate that their enrollment decisions were influenced by their selected institution's affordability. Moreover, more than three-quarters of non-matriculants suggest that SUNY OW's annual tuition price was at least moderately influential in their decision not to enroll. To begin addressing students' financial concerns, SUNY OW should emphasize its overall value for the educational quality it provides. Nearly three-quarters of respondents who identify value for the cost as one of their top considerations in applications decisions rate SUNY OW's value positively. SUNY OW should also continue to highlight its affordability and overall quality.

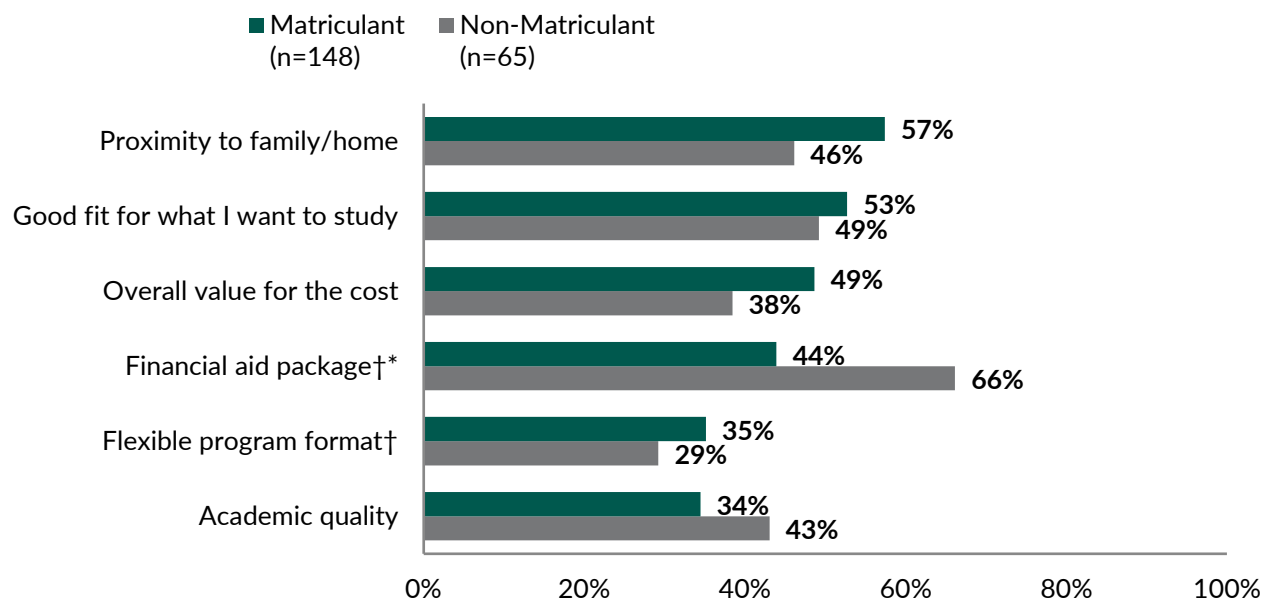
KEY FINDINGS

APPLICATION DECISION FACTORS

When deciding where to apply for their undergraduate degree, SUNY OW matriculants place the greatest importance on proximity to home, while non-matriculants value financial aid packages more highly.

- Matriculants are significantly less likely than non-matriculants to select financial aid as one of the top five factors affecting their decision where to apply (44% and 66%, respectively).
- Instead, matriculants place greater importance on proximity to home (57%), an institution's fit for what they want to study (53%), and the overall value for the cost of the degree (49%).

Which of the following factors were most important to you when deciding where to apply for an undergraduate program? Please select up to five options.



ENROLLMENT DECISION FACTORS

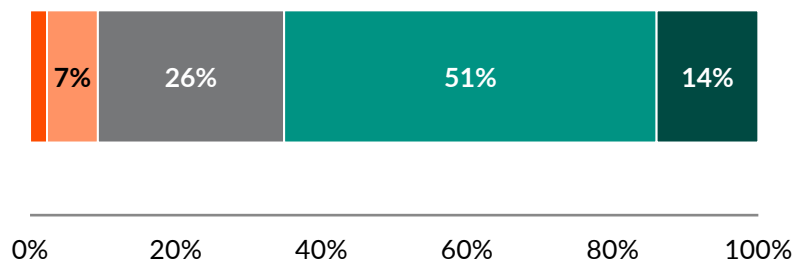
Decisions to enroll at SUNY OW are largely guided by its affordability and its proximity to students' homes and families.

- Nearly two-thirds of matriculants report that their reasons for enrolling at SUNY OW include its affordability (65%) and closeness to family/home (63%). Most non-matriculants chose their current university because it is a good fit for what they want to study (66%) and is close to their home (56%).
- When comparing groups, a much larger proportion of non-matriculants indicates that the financial aid package they were offered influenced their enrollment decision (54% compared to 34%). Most non-matriculants who received a financial aid offer from SUNY OW were somewhat or completely satisfied with the offer (65%).

How would you rate your level of satisfaction with the financial aid offer you received from SUNY OW?
(n=43)

Non-Matriculants

- Completely dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Completely satisfied



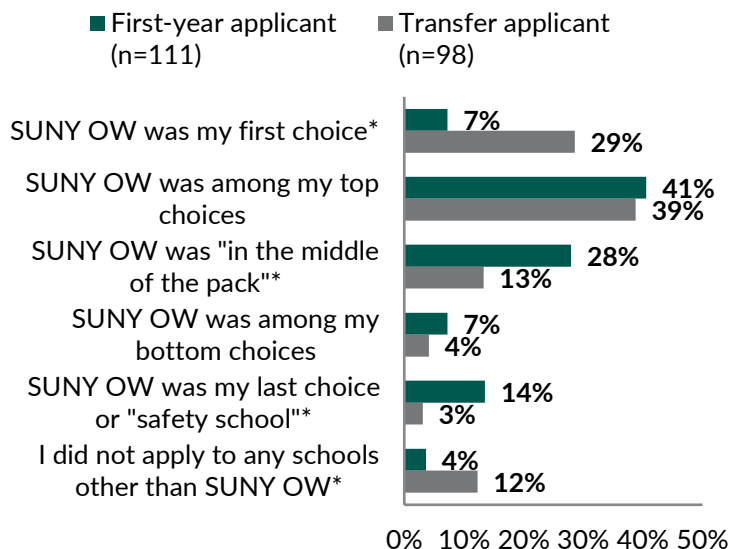
Why did you decide to enroll at [SUNY OW/your current university]? Please select all that apply.	Matriculant (n=144)	Non-Matriculant (n=50)
Affordability	65%	50%
Close to my family/home	63%	56%
Good fit for what I want to study	54%	66%
Provides good value for the money	41%	34%
Flexible transfer credit policies	38%	28%
Offered a good financial aid package†*	34%	54%
Close to where I want to live	30%	30%
Positive experience with the application process	29%	34%
Availability or diversity of extracurricular activities	17%	24%
A friend or relative was attending	17%	22%
Campus social life	9%	18%
Highest-ranked school to which I was accepted*	5%	14%
Offered a spot on an athletics team	2%	2%

TRANSFER STUDENTS' DECISIONS

Transfer students' enrollment decisions are more heavily influenced by an institution's alignment with their academic interests and its transfer credit policies than first-year applicants.

- Transfer applicants who applied to multiple schools are more likely than first-year applicants to rank SUNY OW as their first-choice when applying (29% and 7%, respectively).
- Both groups' decisions to enroll are largely influenced by program affordability (61%) and proximity to home (60%). However, transfer students are significantly more likely than first-year students to be influenced by a institution's fit for what they want to study (67%) and its flexibility of transfer credit policies (56%).
- First-year applicants indicate being more influenced by financial aid packages (48% compared to 30%).

If you applied to somewhere other than SUNY OW, how did SUNY OW rank among all the schools to which you applied?



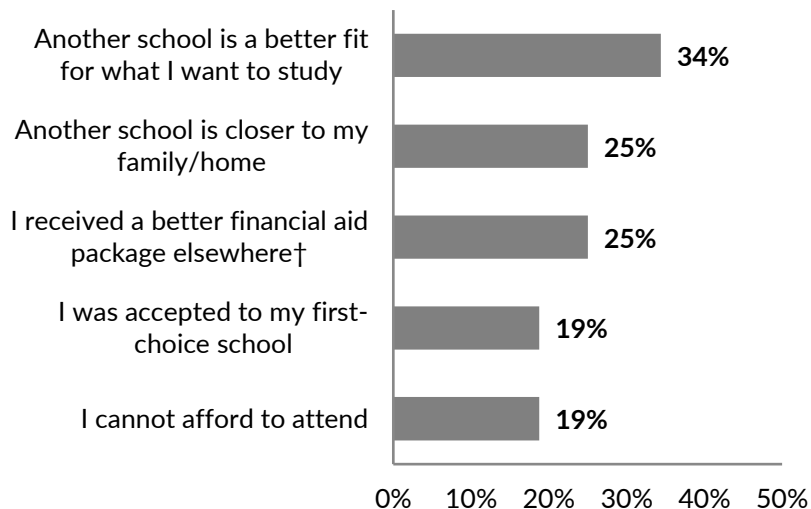
Why did you decide to enroll at [SUNY OW/your current university]? Please select all that apply.	First-year applicant (n=100)	Transfer applicant (n=94)
Close to my family/home	63%	60%
Affordability	61%	61%
Good fit for what I want to study*	48%	67%
Offered a good financial aid package†*	48%	30%
Provides good value for the money	33%	46%
Close to where I want to live	28%	32%
Positive experience with the application process	26%	35%
Availability or diversity of extracurricular activities	23%	15%
A friend or relative was attending	22%	15%
Flexible transfer credit policies*	16%	56%
Campus social life	14%	9%
Highest-ranked school to which I was accepted	8%	6%
Offered a spot on an athletics team	3%	1%

DECISIONS NOT TO ENROLL AT SUNY OW

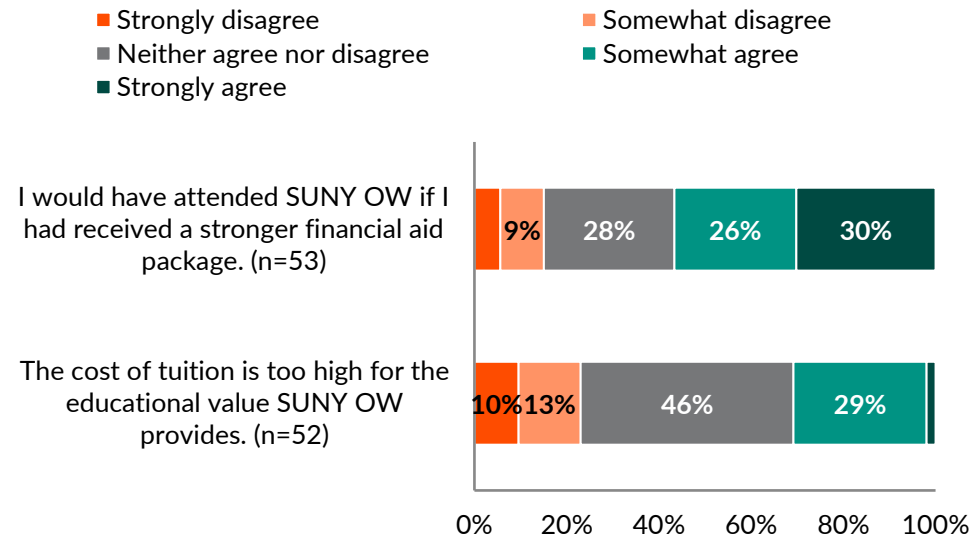
Decisions not to enroll at SUNY OW are motivated largely by program fit and available financial aid.

- Non-matriculants' decisions to enroll elsewhere were most influenced by the school's fit for what they want to study (34%), its proximity to family/home (25%), and the financial aid package it offered (25%).
- Though most non-matriculants who received financial aid offers were satisfied with the offer, more than half indicate that they would have enrolled with SUNY OW if they had received a stronger financial aid package (56%).
- Despite this emphasis on financial aid, less than one-third of non-matriculants feel that the cost of tuition at SUNY OW is too high for the educational value it provides (31%).

Why did you decide to not enroll at SUNY OW?
Please select all that apply. (n=64)



Please rate your level of agreement with the following statements.

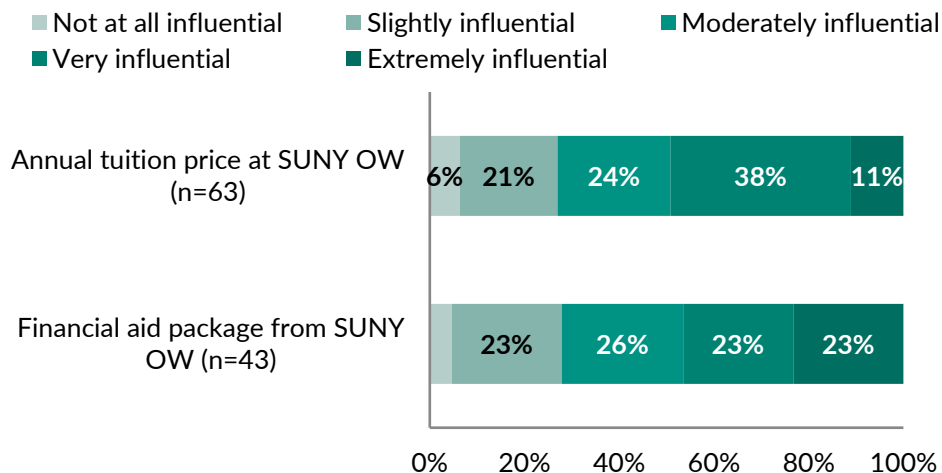


FINANCIAL CONSIDERATIONS

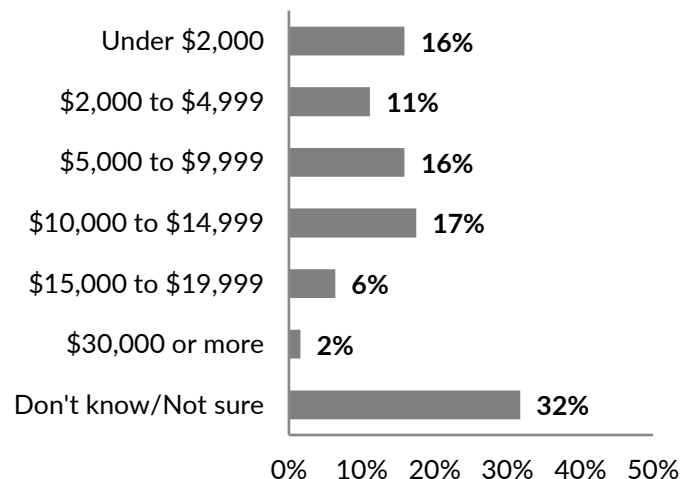
Most non-matriculants' enrollment decisions were influenced by financial considerations, though roughly one-third of respondents in this group reported not knowing their expected out-of-pocket cost to attend SUNY OW.

- SUNY OW's annual tuition price and financial aid award were at least moderately influential in roughly three-quarters of non-matriculants' decision not to enroll (76% and 72%, respectively).
- Despite the role of financial considerations in these decisions, almost one-third (32%) of non-matriculants are unsure what their annual out-of-pocket cost would have been had they enrolled at SUNY OW.
- Among non-matriculants that did report their expected out-of-pocket cost to attend SUNY OW, the most common estimate was \$10,000 to \$14,999 (17%), followed by \$5,000 to \$9,999 and under \$2,000 (16% each).

How influential [was/were] the following
in your enrollment decision?
Non-Matriculants



What was your expected annual "out-of-pocket"
cost to attend SUNY OW if you had chosen to enroll
there? (n=63)
Non-Matriculants

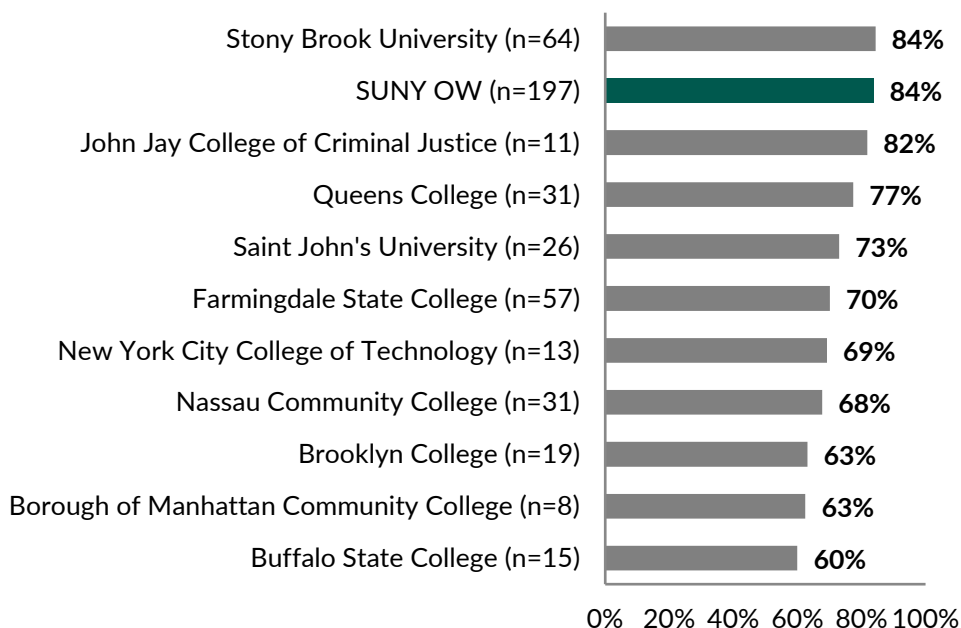


OVERALL PERCEPTIONS OF SUNY OW

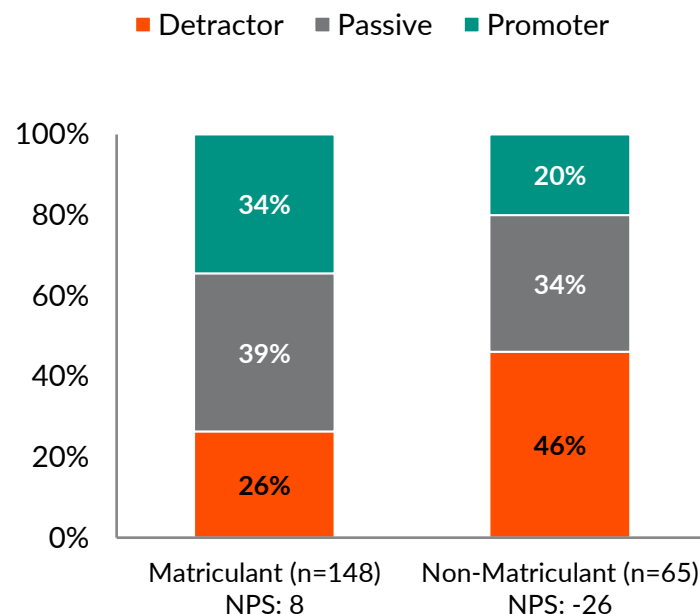
SUNY OW compares favorably to selected peers and competitors with respect to perceptions of overall quality.

- A sizable majority of participants rate the overall quality of SUNY OW as either “good” or “excellent” (84%), which is on par with ratings of the institution’s most highly-rated competitor, Stony Brook University (84%).
- Matriculants are more likely than non-matriculants to recommend SUNY OW to others; just over one-third rate their likelihood of recommending SUNY OW as a 9 or 10 (34%) compared to one-fifth of non-matriculants (20%).

How would you rate the overall quality of the following universities?
% Good or Excellent



On a scale from 0-10, how likely are you to recommend SUNY OW to a friend, family member, or colleague?

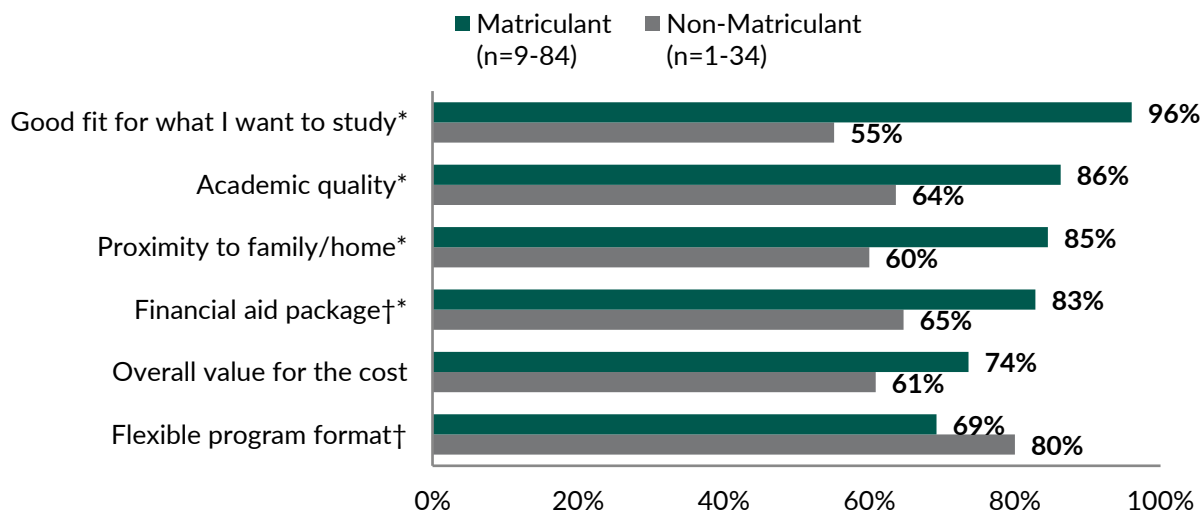


PERCEPTIONS OF SUNY OW ON KEY FACTORS

Matriculants rate SUNY OW favorably on the most common top-five factors guiding application decisions.

- More than two-thirds of matriculants rate SUNY OW as either “good” or “excellent” on the factors that influence application choices the most (69-96%). Among the top factors, program flexibility was rated least positively by matriculants (69%) but most positively by non-matriculants (80%).
- Both student groups indicate that the degree to which an institution is a good fit for what they want to study is the second-most important factor when applying. However, non-matriculants are significantly less likely to rate SUNY OW as “good” or “excellent” in this regard (55% and 96%, respectively).
- Despite selecting financial aid as the most important factor, just under two-thirds of non-matriculants rate SUNY OW’s financial aid package as “good” or “excellent” (65%).

How would you rate SUNY OW in the following areas?
% Good or Excellent

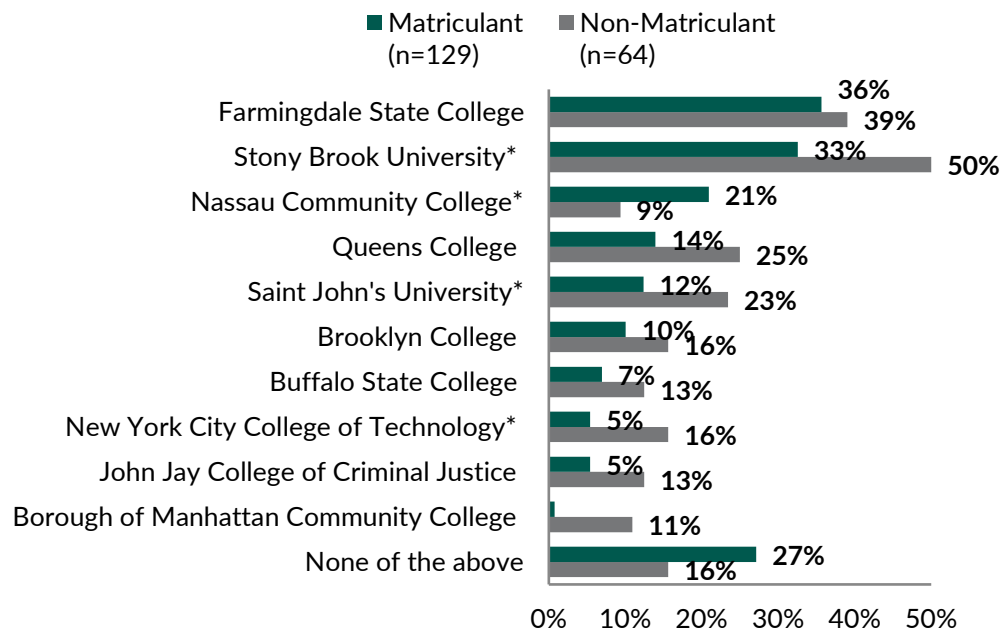


ENROLLMENT AMONG COMPETITORS

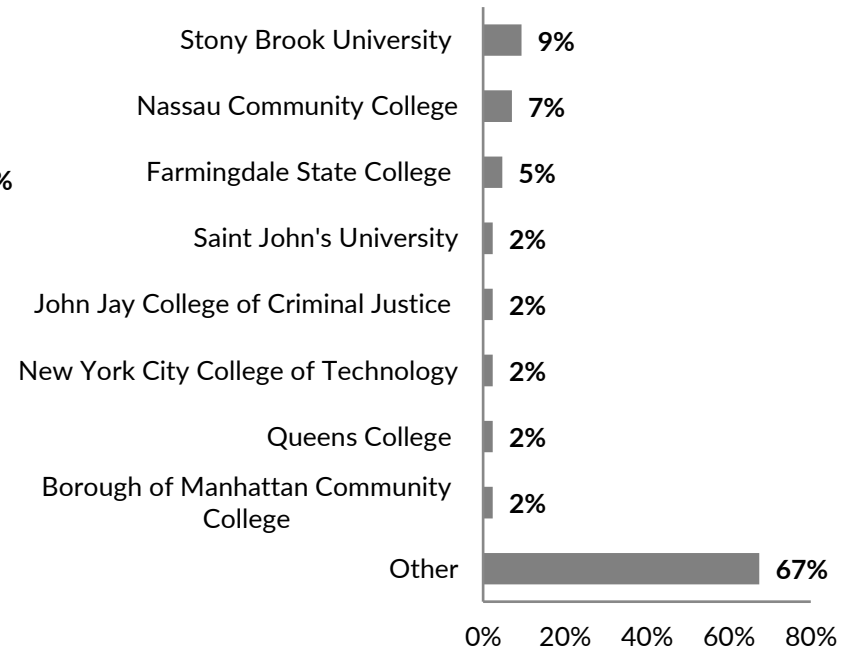
Stony Brook University was widely considered among non-matriculants, but most chose to enroll outside of SUNY OW's selected competitor group.

- More non-matriculants applied to Stony Brook University (50%) than to any other listed institution, but less than one-tenth chose to enroll at that university (9%).
- No more than 7% of surveyed non-matriculants who are currently enrolled elsewhere chose any other listed institution. The majority of non-matriculants who enrolled elsewhere chose institutions outside of SUNY OW's selected competitor group (Other, 67%).

**Did you apply to any of the following universities?
Please select all that apply.**



Where did you end up enrolling? ± (n=43)



COVID-19 IMPACT

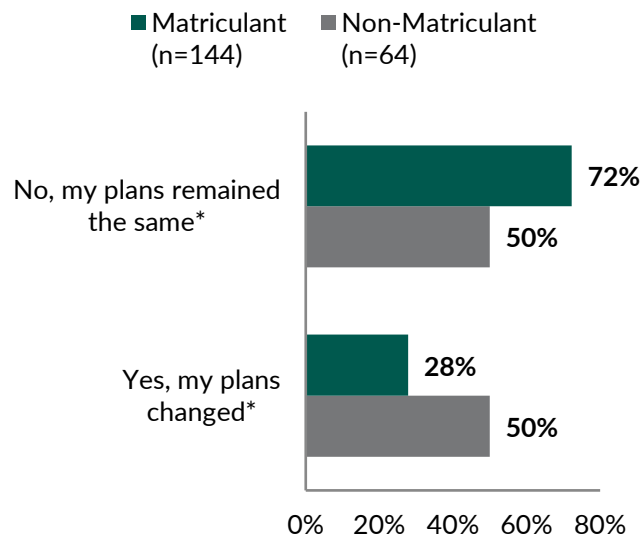
Non-matriculants are significantly more likely to report COVID-related impacts to their college plans.

- Half of surveyed non-matriculants indicate that COVID-19 impacted their higher education plans for the Fall 2021 term, compared to roughly one-fourth of matriculants (28%).

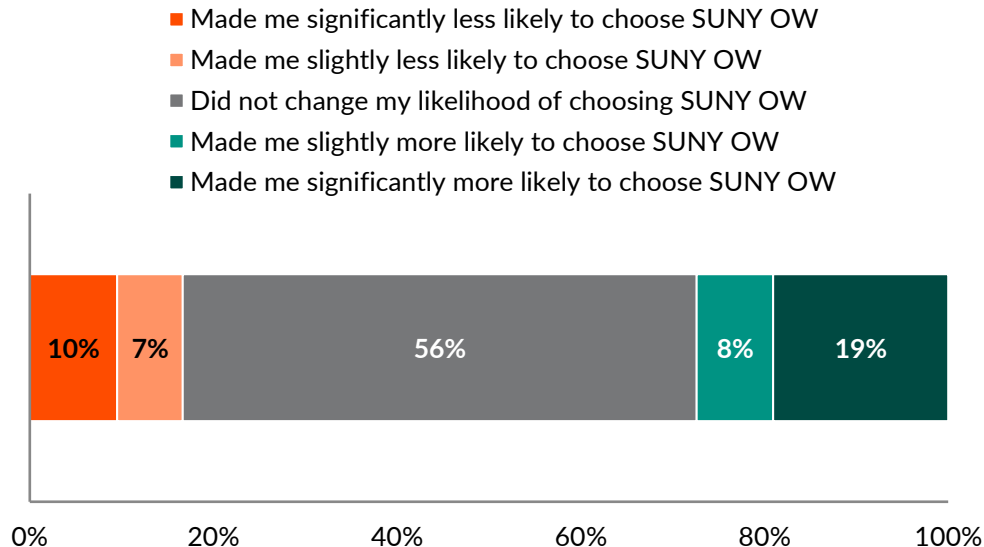
SUNY OW's vaccine requirement had little impact on students' enrollment decisions.

- For most applicants, SUNY OW's vaccine requirement had no impact on the likelihood of enrollment (56%), and it increased the likelihood of enrollment for just over one-quarter of participants (27%).

Did the current state of the COVID-19 pandemic impact your higher education plans for Fall 2021?



To what extent did SUNY OW's vaccine requirement for on-campus affect your decision on where to enroll? When making my decision where to attend, SUNY OW's vaccine requirement... (n=84)

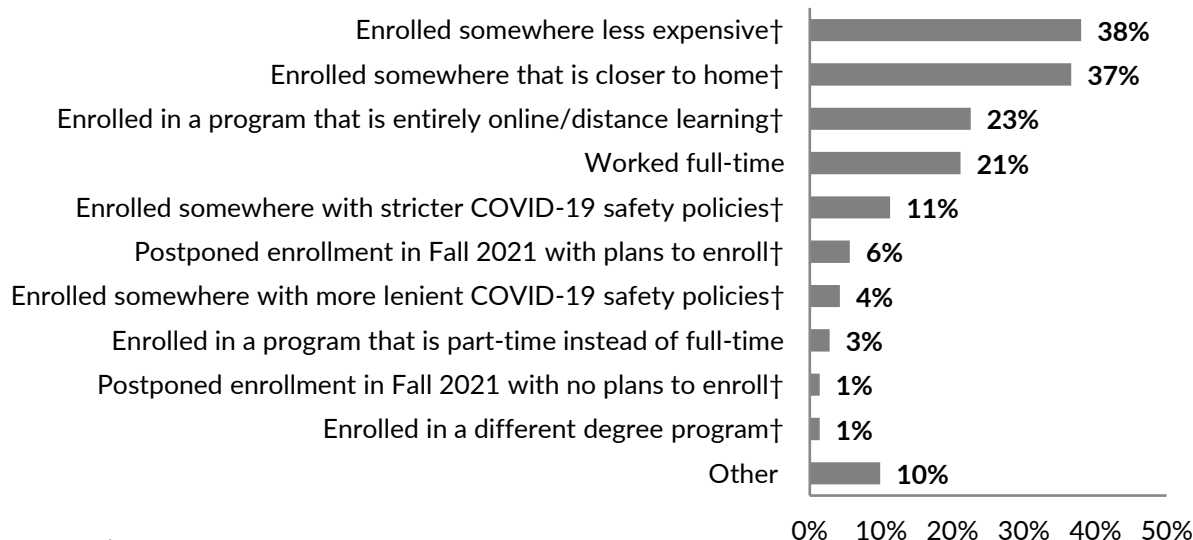


CHANGES AS A RESULT OF COVID-19

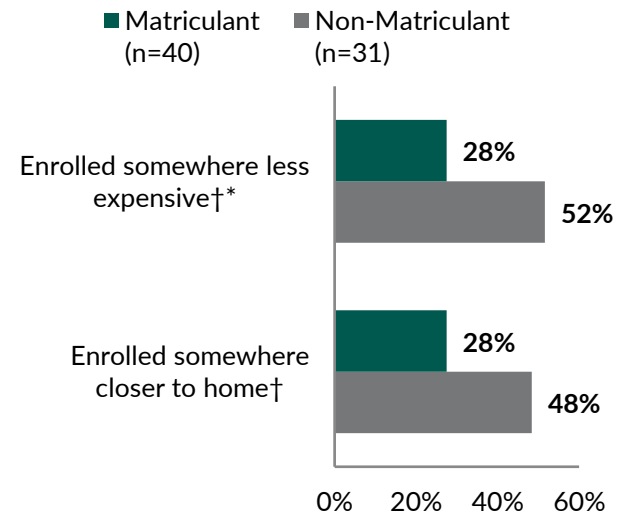
Participants whose plans were affected by COVID-19 were most likely to enroll in programs that are less expensive and/or closer to home than they had initially planned.

- Because of COVID-19, more than one-third of participants opted to enroll in a less expensive college or university (38%) or one that is closer to home (37%).
- Very few participants reported enrolling in a college or university with stricter (11%) or more lenient (4%) COVID-19 safety policies.
- Non-matriculants are nearly twice as likely as matriculants to have enrolled at a less expensive college or university in response to the pandemic (52% compared to 28%).

In what ways did the COVID-19 pandemic affect your decision-making?
Please select all that apply. (n=71)



In what ways did the COVID-19 pandemic affect your decision-making?
Please select all that apply.

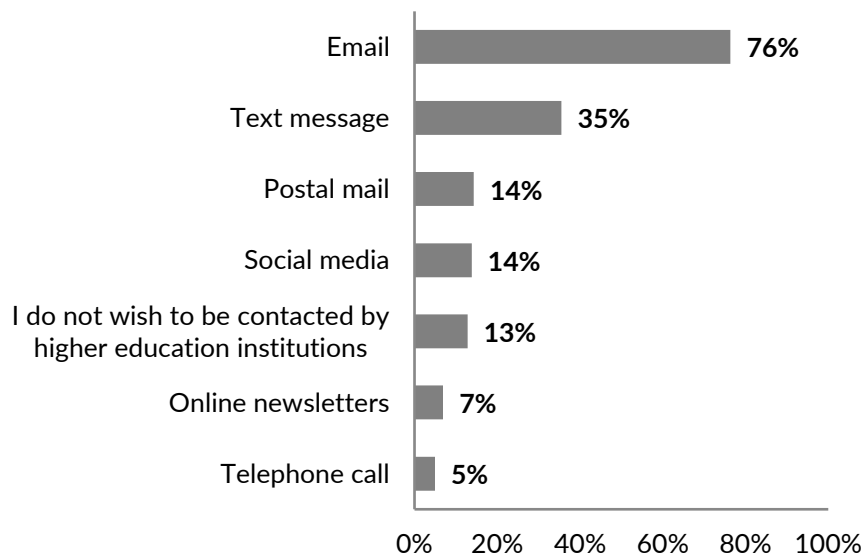


COMMUNICATION PREFERENCES

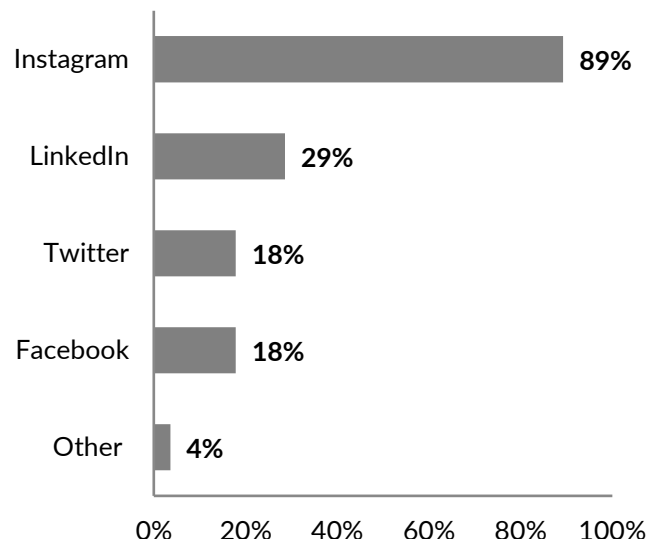
Participants generally prefer digital modes of communication when receiving information from colleges and universities.

- Most participants report email as their preferred way to receive communication from higher education institutions (76%), followed by text message (35%).
- Among participants who prefer social media as a means of receiving communication, the vast majority indicate that Instagram is their preferred platform (89%).

In which of the following ways would you prefer to receive communication from higher education institutions? Please select all that apply. (n=203)



Please select the social media platforms through which you prefer to receive communication from higher education institutions. Please select all that apply. (n=28)



RESPONDENT CHARACTERISTICS

Gender (n=203)

Female	80%
Male	18%
Non-binary/Gender non-conforming	1%
Not listed/Prefer to self-describe	0%
Prefer not to respond	0%

Race/Ethnicity (n=203)

American Indian or Alaska Native	1%
Asian	18%
Black or African American	23%
Hispanic/Latino	33%
Middle Eastern or North African	1%
Native Hawaiian or Other Pacific Islander	0%
White	29%
Not listed/Prefer to self-describe	2%
Prefer not to respond	3%

Household Income (n=203)

Under \$25,000	17%
\$25,000 to \$49,999	26%
\$50,000 to \$74,999	12%
\$75,000 to \$99,999	5%
\$100,000 to \$149,999	9%
\$150,000 to \$199,999	2%
\$200,000 or more	1%
Prefer not to respond	26%

Employment (n=203)

Employed part-time while attending school	47%
Not employed	34%
Employed full-time	14%
Prefer not to respond	2%
Employed part-time and not attending school	<1%
Other	2%

Did your parent(s) graduate from college? (n=203)

No	48%
Yes, one parent	25%
Yes, both	20%
Prefer not to respond	4%
Don't know	3%



Thank you.

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