



University of Northern Iowa

Market Research Findings
December 2008

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Noel-Levitz®

About 6 months ago, UNI leadership commissioned a study that would examine the institution's marketplace image and its opportunities. We'll be looking at the results of that study today, and I think you will find that while there is no magic bullet for enrollment success there are clear directions for how UNI needs to communicate itself to the student marketplace.

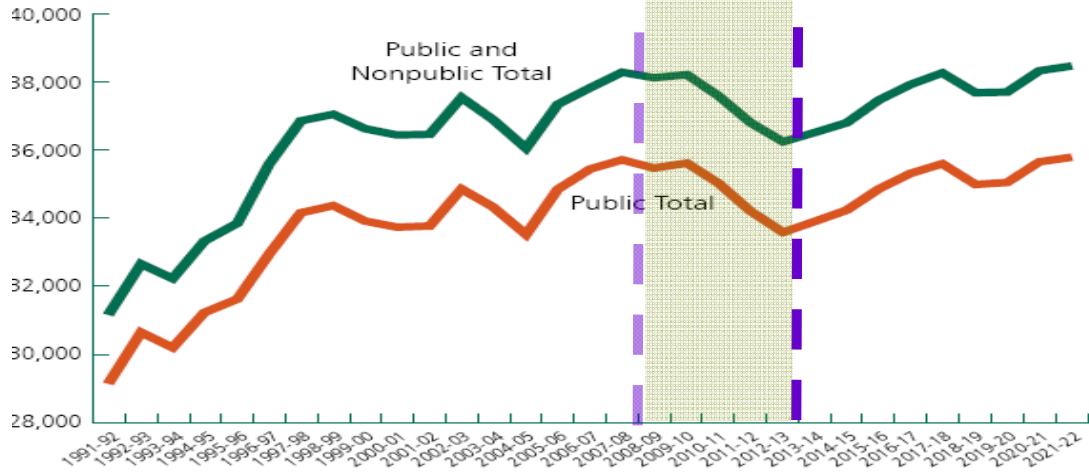
UNI operates in an extremely competitive higher education marketplace



UNI operates in an arena that includes 23 institutions of higher education in Iowa and more than 3,400 throughout the United States. These institutions collectively are spending millions of dollars every year to recruit students through web sites, publications, direct mail, financial aid strategies and many other techniques.

The face of Iowa is changing

**Figure 2. Iowa High School Graduates
1991-92 to 2004-05 (Actual), 2005-06 to 2021-22 (Projected)**



Along with much of the rest of the nation, Iowa is poised to enter a new period, characterized by stagnant growth in the production of high school graduates. After reaching a peak in 2007-08 at 38,291, the state will see a sharp decline in the number of high school graduates each year through 2012-13, assuming a continuation of existing patterns of enrollment, progression, and completion.

Between 2007-08 and 2012-13, the number of high school graduates is forecast to drop by over 2,000 (5.4 percent).

The face of the traditional age student population is changing. First generation and minority students are larger part of the group that is coming up. In 1994-95, White non-Hispanics accounted for 94.8 percent of the graduates from the state's public high schools. A decade later, that proportion had dropped to 91.5 percent. By 2014-15, that decrease will have accelerated and the proportion of White non-Hispanics will have fallen to under 83.4 percent.

The competition factor is intense

10,503 high school seniors / 2007-08*

23 institutions of higher education**

57.8% college continuation rate (6,071)***
(ranks 23rd among states)

28% leave the state to go to college (1,699)****
(ranks 15th among states)

4,372 students ÷ 23 institutions = 190 students per
institution

Sources:

*Western Interstate Commission for Higher Education, 2003

**The Chronicle of Higher Education, 2007

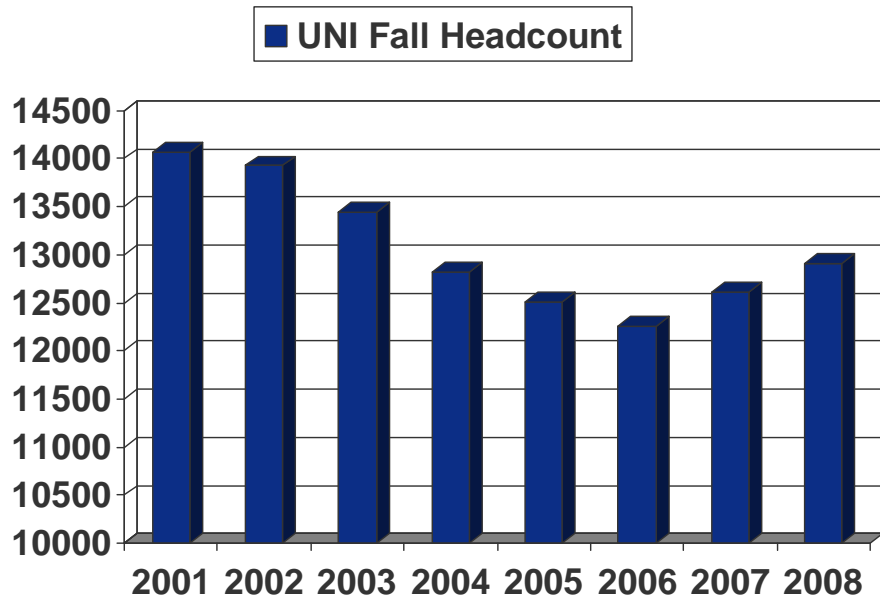
***Postsecondary Education Opportunity, 2007

****Postsecondary Education Opportunity, Interstate Migration Data, 2006

This slide brings home the challenges UNI is facing.

It reminds us that we need to actively recruit students not just wait for them to enroll.

Sustaining enrollment can be a challenge



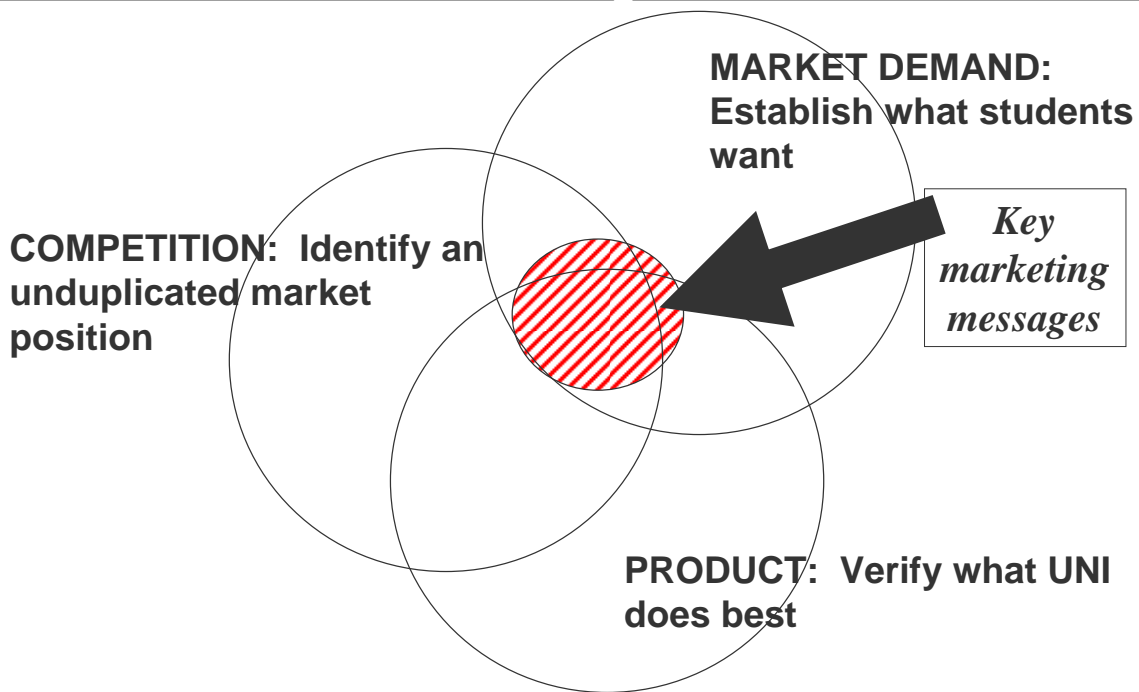
Even with a competent admissions and marketing operation, sustaining enrollment can be a challenge. With the increasing challenge of the growing community college sector and the aggressive marketing of private institutions, what are the keys to enrollment stability and even growth for the university?

How do we market and recruit UNI in this environment?



So the question we wanted to answer through this research was: how do we market UNI in this new environment. Specifically: What are the marketing messages and brand positioning that are first, true, and second, resonate with prospective students and their parents.

University of Northern Iowa market research goals



As you establish a brand, one of the most important tasks is listening – and that essentially is what market research is. It's listening to the marketplace in order to understand their expectations. Only then can we respond by sharing what UNI is all about.

First, we need to understand what students want from UNI.

Second, we need to understand what UNI does well – what are the special strengths of the institution that align with market expectations.

Finally, we need to understand how your competitors have positioned themselves, so that we do not simply duplicate their messages.

Where these three areas intersect represents opportunity for UNI, and provides the foundation for establishing your best market position.



If you emphasize everything, people will remember nothing.
The greatest challenge of branding is knowing what not to emphasize.

Simplicity and consistency



The keys to effective positioning are simplicity and consistency.

The market research revealed four central findings



The market research revealed four key findings that will lead us to the best marketing messages for UNI.

Finding

1

What the market
wants from a
college education
is . . .



We started our research by looking at the expectations of our target audience. There are dozens of positive things we could say about UNI, but we need to choose those things that matter most to students.

Should UNI be market oriented or mission driven?



Should UNI be market oriented or mission driven? On one hand we don't want to be like the University of Phoenix where quality of education is competing with profits to shareholders - and on the other hand we don't want to go the way of the US automakers because we are operating with blinders on.

I'd like to suggest that it is possible for you to be both. And that the inherent strengths that make UNI special are in fact what students both want and need.

We chose these research populations

- (1) Prospective student inquiries
- (2) Parents of prospective student inquiries
- (3) Community college transfer students
- (4) Non-enrolled admitted students

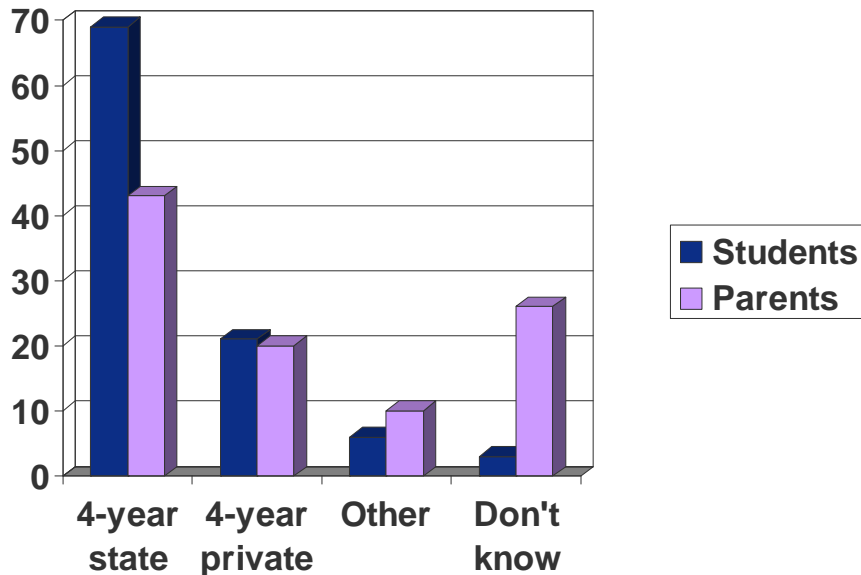


We investigated these four research populations. We completed telephone surveys with 232 college-bound high school students who had inquired to UNI and 233 parents of college-bound high school students from the same population.

We conducted an on-line survey of Iowa community college students and had 145 students respond who are planning to transfer to a four-year institution and contacted 35 non-enrolling admitted students for in-depth interviews.

Students have a strong initial preference for state universities

Which type of school would you prefer . . . ?



To understand the advantage or disadvantage UNI faces simply by virtue of its institutional type, we asked students which type of school they ultimately would prefer to attend. This was in part to understand whether a public institution is viewed as a first choice option or simply second place to one of Iowa's many fine private colleges.

The good news is that the students in your inquiry pool have a strong initial preference for state universities.

Interestingly, however, out of state students were significantly more likely to prefer state universities (81%) than were Iowa students (66%) – suggesting that Iowa privates have made their mark.

The competitive ranking

Which would be your first choice?

	Students	Parents
Iowa State	22%	14%
UNI	14%	15%
U of Iowa	12%	7%



Then we wanted to understand UNI's position versus the other Iowa publics. It was a surprise here to see the dominance of not Iowa but Iowa State among your targeted students. That dominance does not hold with parents, where UNI holds its own.

Parents must be a focus for marketing communications

How involved are you?

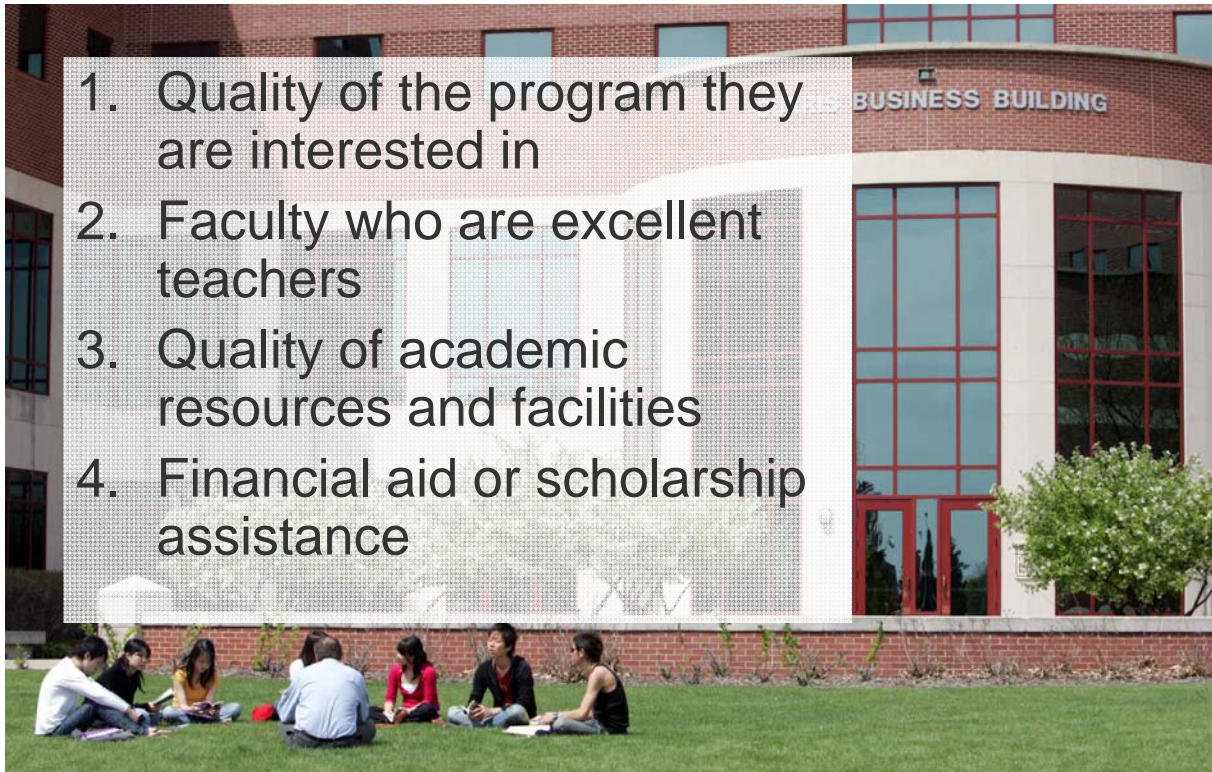
Very	64%
Moderately	35%
Not	2%



Who is influencing students in their college choice process? The number one answer, beyond guidance counselors and teachers, is of course parents. In fact, among your inquiries 98% of parents say they are some what or very involved in their child's college choice.

A little later we'll look a study we did of your top 10 competing institutions. When we inquired to them as prospective students, how many of them do you guess sent any type of marketing information to parents? (Answer: none)

Top choice factors for UNI inquiries



We tested 14 common college choice factors. They included common things such as having small classes, athletic programs, and the institution's overall reputation.

These are the four items that were rated most highly by UNI inquiries.

These items are either "very important" or "important" to about nine out of every ten students, with at least six in ten saying they are "very important."

Because students identified these as their most important college choice considerations, these topics should receive the most "air play" in recruitment materials.

Top choice factors for parents

For parents:

1. Quality of academic major/program
2. Faculty who are excellent teachers



For parents the list was shorter – but two of the same items appeared.

What's *least* important?



Opportunities for
community service

Small classes

Easy to become a campus
leader

Nationally known athletic
programs

These were the least important factors for both students and parents.
Fewer than than 20 percent of students rated these as “very important.”

What is academic quality?

- Students gain exceptional knowledge/skills
- Excellent teachers
- Institution makes continual improvements to the student experience
- Ease of employment for graduates
- Up-to-date resources and facilities
- Specific academic programs have a reputation for excellence

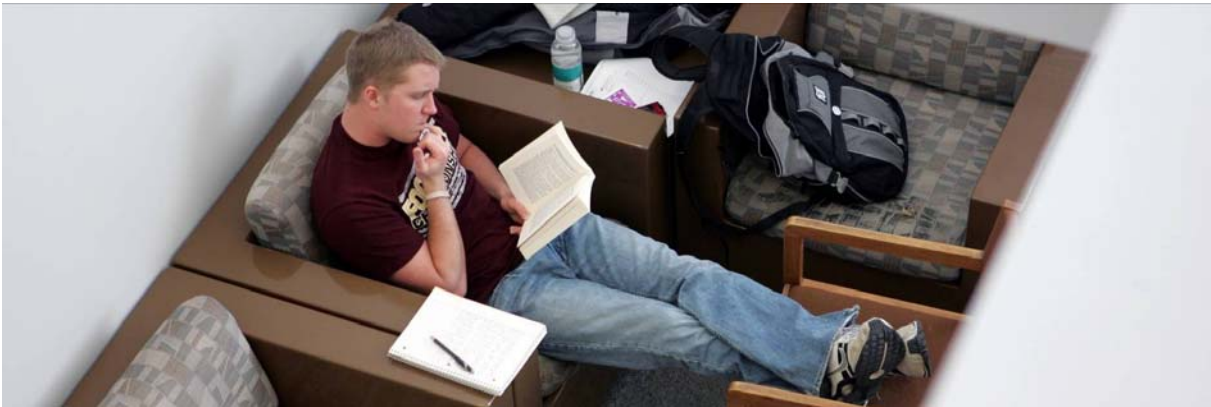
There are many ways to define academic quality – it's a broad term. We asked students and parents to rank 10 components of academic quality. They had a hard time deciding what was most important and in fact, there were six concepts seem to be about equally involved in their definition of "academic quality":

- Exceptional knowledge / skill development;
- Excellent teachers;
- Continuous institutional focus on improvements to the student experience;
- Ease of employment for graduates of the institution;
- Excellent, up-to-date resources and facilities; and
- Specific academic programs have a reputation for excellence.

What is less important?

Faculty are involved in nationally recognized research and scholarship

Faculty have studied at prestigious institutions



These items were ranked at the bottom of the list. They are not unimportant, but in the hierarchy of things they are less important than the others.

Having studied at prestigious institutions was ranked at fitting their definition of academic quality “very well” by just 27% of parents and 44% of students.

Research and scholarship were ranked at 40% by parents and 49% of students.

UNI alumni reinforced this finding. When asked about their personal definition of quality alumni seem to care little for the credentials and research pursuits of their former professors. Of greater value to the alumni who were interviewed were teaching ability, mentoring and proactive networking these teachers offered in support of their students.

The most important considerations for transfer students are:

1. Transferability of credits
2. Financial aid or scholarship assistance
3. Quality of the program they are interested in



In terms of overall college choice factors, transfer students have a different set of values and that does not come as a surprise. However, again we see quality of academic major being a top consideration.

What do students and parents want in educational outcomes?



We know from our experience that while marketing messages need to address the features and benefits of a particular institution, they also need to address educational outcomes or results. This is a central expectation of both students and parents.

Expectations for educational outcomes

1. Get a good job after college - 96%
2. Become well educated in the specific major you will study - 94%
3. Become a mature adult - 90%

*Percent important/very important



We tested 11 educational outcomes – and the top-desired educational outcomes for students are **getting a good job after college and becoming well educated in the major** they will study. When talking about the “bottom line” of an investment a UNI degree, these are the outcomes that should be illustrated through stories and examples.

(Items tested:)

1. Get a good job after college
2. Become well educated in the specific major you/they will study
3. Become a mature adult
4. Become a responsible citizen
5. Develop a higher degree of self-confidence
6. Prepare to make a contribution to the world, not just earn a paycheck
7. Become well educated in a variety of subjects
8. Gain an awareness of your/their own personal values
9. Learn to understand and appreciate diverse people and viewpoints
10. Continue on to graduate school after college
11. Become a leader in the community

Parents place roughly equal emphasis on an education that helps their child:

- Become a mature adult;
- Become a responsible citizen;
- Develop a high degree of self-confidence;
- Gain an awareness of their own personal values; and
- Become a leader in the community.



Interestingly, parents are looking at outcomes that are broader and are related to the maturation process of their son or daughter.

What do they
think about
UNI?



So that's what students and parents want from a college. But what do your prospects really think about UNI?

Share of mind

What “slices” of public perception does UNI own?



When we think about branding or public perception, we often frame it in terms of who owns a certain brand characteristic. For example, Toyota may own the dependability category but Lexus owns the style category. In our next section of the survey, we attempted to determine who owns what in the Iowa higher education space.

So we took that same list of college choice characteristics that were ranked in terms of importance and asked students and parents to choose which institution is best known for each characteristic. The institutions from which they chose were:

University of Northern Iowa;

Iowa State University;

University of Iowa;

The private college in Iowa with which they were most familiar; and

The community college in Iowa with which they were most familiar.

Which is best known for . . . ?

	UNI	Iowa St	U Iowa
Quality of program of interest	23%	<u>29%</u>	18%
Professors who are excellent teachers	17%	<u>23%</u>	17%
Quality of academic resources and facilities	14%	<u>33%</u>	19%

Here we see the brand image of UNI and its top PUBLIC competitors. This data shows student perceptions on the top three items of importance.

We can see that Iowa State is a formidable competitor in terms of owning those characteristics that are of greatest importance to students.

Transfer students are highly positive

Which of these institutions is best known for:			
	UNI	Iowa St	U of Iowa
Quality of program you are interested in	61%	14%	11%
Transferability of credits	38%	6%	8%
Professors are excellent teachers	36%	14%	11%
Financial aid/scholarships	28%	6%	8%
Friendly professors who readily meet with individual students	25%	2%	3%
Quality of academic resources and facilities	23%	31%	22%

UNI, however, completely dominates with the transfer student market.

These students are more likely than high school students to have already narrowed their choices down to one or two institutions. High school students were applying to 3 or 4 colleges, transfers to 1 or 2.

UNI v. privates and community colleges

UNI: Financial aid
and scholarships

Private colleges:
Friendly
professors and
small classes

Community colleges:
Cost of attending



When we asked students to compare UNI with private colleges and community colleges, these are the features that were owned by each group – I think these make intuitive sense.

Can you name an academic program or major that UNI offers?

Program	Students	Parents
Education/teaching	21%	34%
Business/Internat'l Business	13%	15%
Accounting	4%	15%
Music	5%	4%
Pre-professional programs	7%	3%
Don't know	26%	22%

One of the tests of knowledge we use with prospective students is their ability to name an academic major that a school offers. While these results are not atypical, we'd like to see greater recognition of some of the other programs available at UNI.

Challenge and opportunity

Parents were much more likely than students *not to know* which Iowa schools were best recognized for specific characteristics.



More than a third of parents often weren't able to choose which college or university was best known for specific characteristics that are important to them when choosing a school.

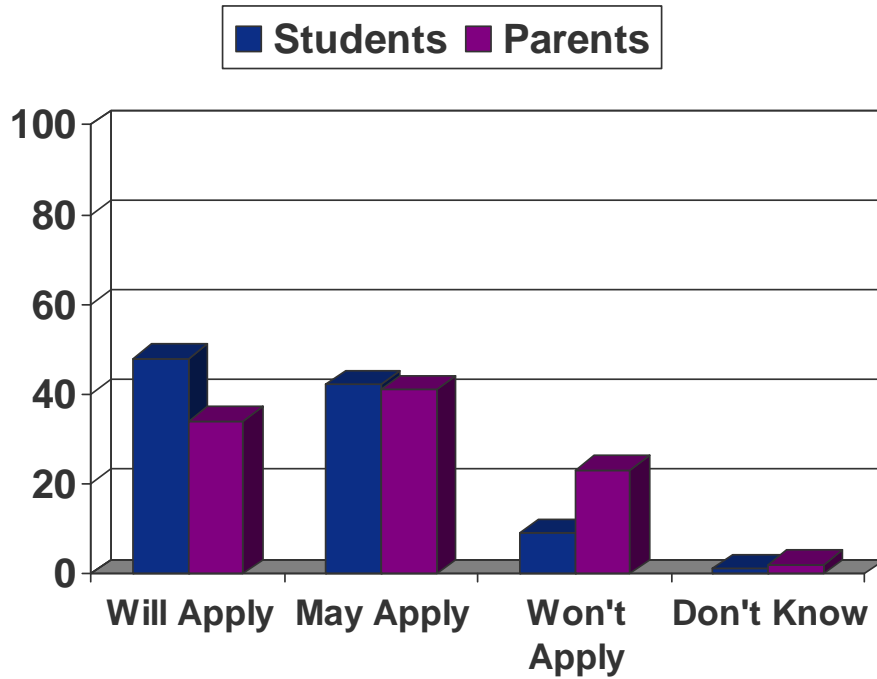
Going forward, managing perceptions of UNI with these parents will be essential to effective recruitment marketing strategies for the university.

- “Students interact with highly qualified professors” was a characteristic of high importance not “owned” by any Iowa institution



Because the student satisfaction inventory and focus groups suggested this as a UNI strength, this message offers an opportunity for UNI to stake out a unique market position.

Will you/your child apply to UNI?



Here's one of those "where the rubber meets the road" questions. Whatever your perceptions of UNI, do you plan to apply?

We all know what a swing vote is in an election. About 40% of the UNI inquiry pool falls into this category.

Finding

2

“Just right” or
strong
academics?
UNI must
promote both



There are some areas of tension that emerge when we talk about marketing UNI and our research examined those as well.

UNI's current market positioning

Just right
University of Northern Iowa
Cedar Falls, Iowa

"UNI is large enough there is
"The campus and surrounding community have a hometown quality; it's so welcoming and friendly." Ashley, Cresco, IA

always something going on,
"I chose UNI, not only for what the college could do for me, but also for the impact UNI will help me make on the college and community." Hannah, Bettendorf, IA

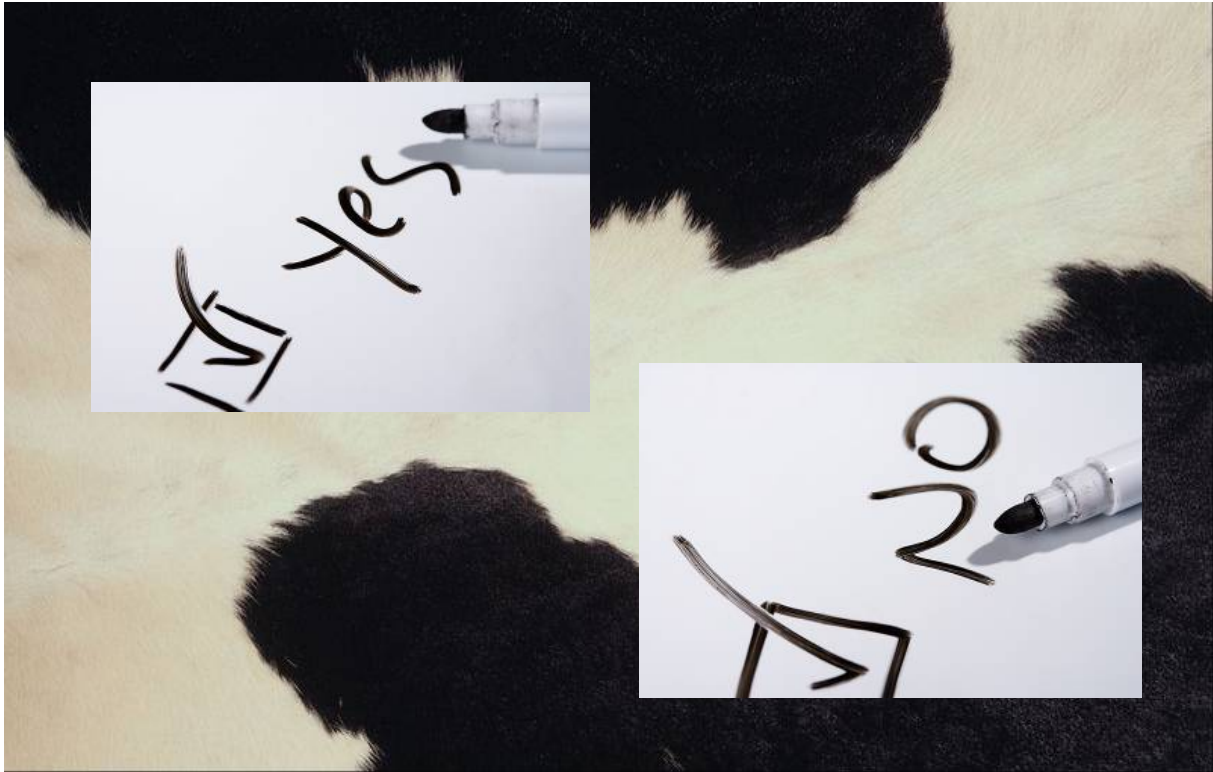
yet small enough that you can get
"The best thing about attending UNI is its size. UNI is large enough to get a feel for a university setting, but small enough to get very involved on campus and feel comfortable interacting with faculty." Jenna, Winthrop, IA

to know your professors."
Christofer, DeForest, WI

See what we mean by
Students First

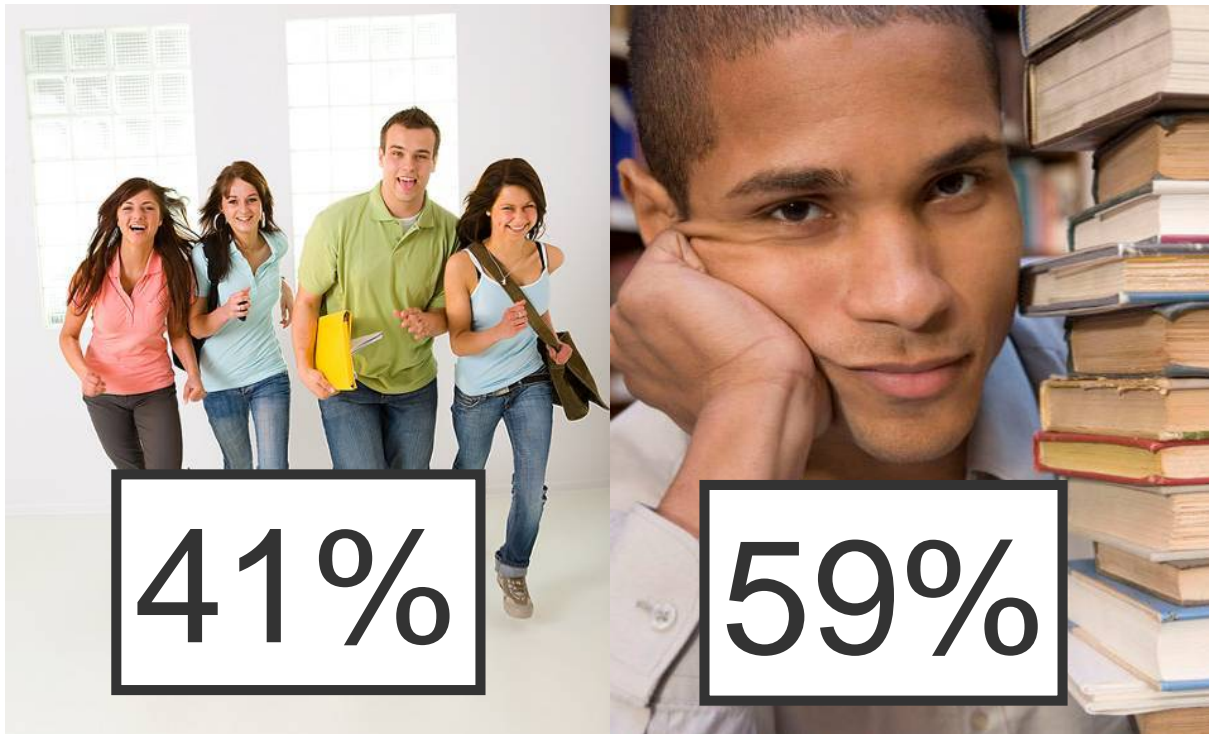
How does this positioning compare with what we just learned is important to students? (Lacking strong academic message)

Either/or



We asked a series of either/or questions – we call them forced choice – because they make student and parents' preferences stand out clearly – not shades of gray.

“Belonging” or academics?



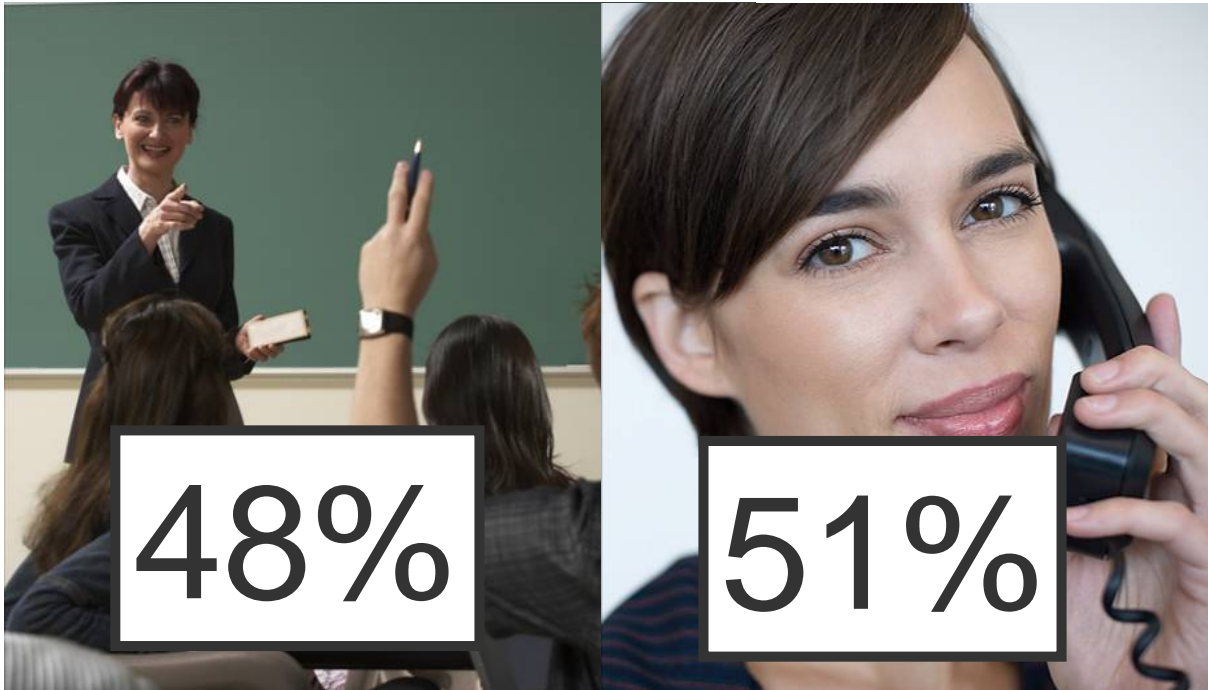
Belonging vs. academics:

Is primarily known as a place where students feel they belong and are highly valued; OR

Is primarily known as a school with strong academics

We saw similar responses from prospective transfer students (46/54)

Excellent teaching or caring faculty and staff?

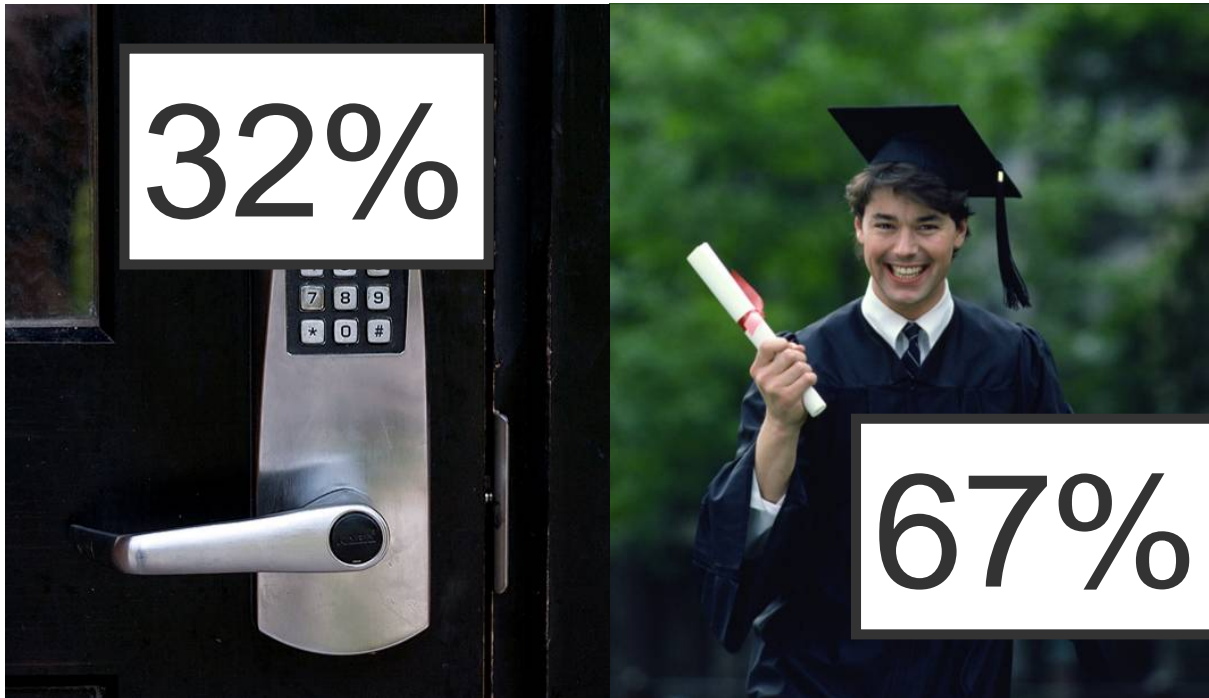


This pair of statements was phrased as follows:

Is a place where professors provide excellent classroom instruction; OR
Is a place where professors and staff genuinely care about students

These results suggest that UNI's inquiry pool has significant numbers on both sides of the belong/caring versus academics/teaching choice alternatives, and UNI can not afford to promote one message to the exclusion of the other.

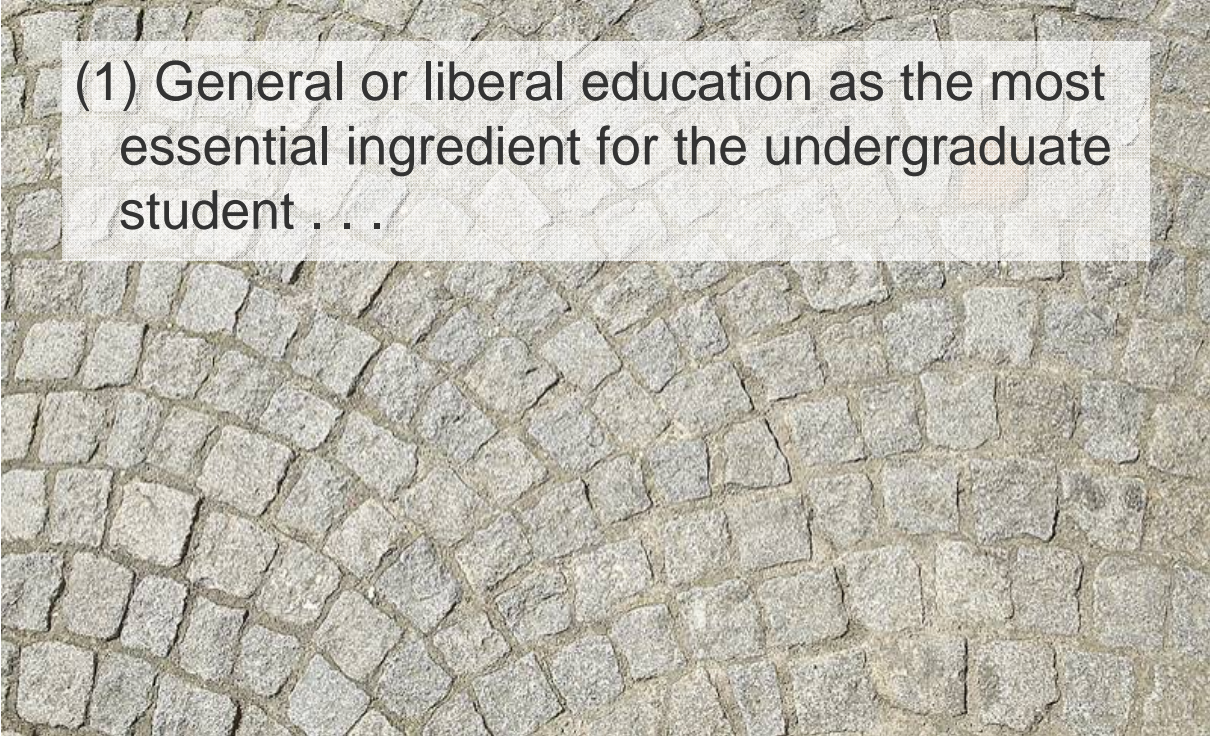
Safe environment or successful graduates?



Is located in a safe community and environment; OR
Has graduates that are highly successful in their chosen fields

Even parents who typically are fanatical about campus safety were evenly split -
48% to 45% between these two options.

Mission versus marketplace

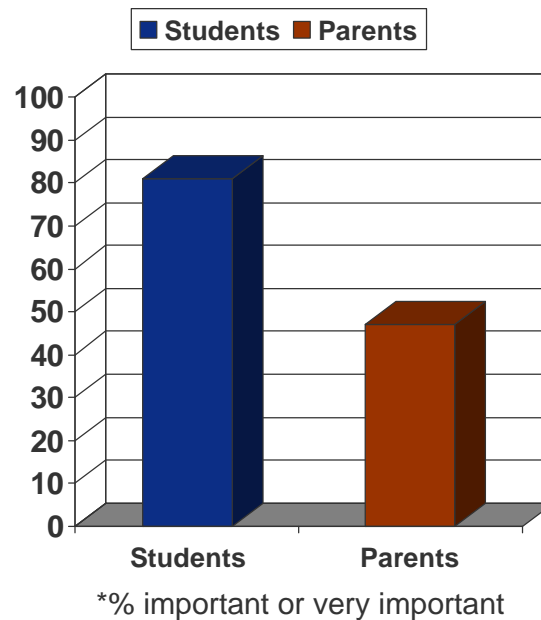


(1) General or liberal education as the most essential ingredient for the undergraduate student . . .

Your institutional mission has as its first main focus the liberal arts - and it raises the question of how mission and marketplace intersect.

What about the liberal arts?

“Become well educated in a variety of subjects” gets significantly different ratings from students and parents – but was ranked by both in the bottom half of desired educational outcomes

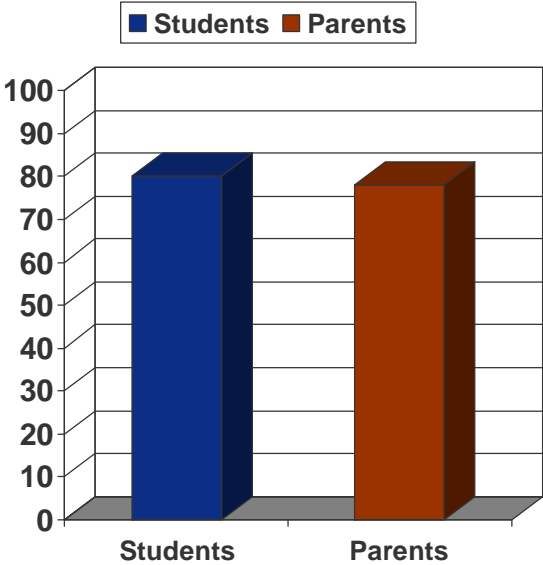


“Become well educated in a variety of subjects” gets an 81% rating from students but just 47% from parents. And was ranked in the bottom half of 11 possible educational outcomes.

One factor at play here is the rising cost of tuition at colleges nationwide. Expectations for practical results are outweighing what is viewed as softer less measurable outcomes.

Learn to understand and appreciate diverse people and viewpoints

But when framed from a practical viewpoint, they agree . . .



But if we frame the liberal arts in terms of their practical application rather than their aesthetics, we see a different reaction – parents give a 78% important/very important rating.

Still for both groups the concept of liberal education is still less important than getting a good job after college. So we need to clearly make the link for them between being liberally educated and being employable.

Emotional components to choosing a college

Component	Students	Parents
I feel confident that I/my child will be successful academically at the institution	84%	85%
I feel secure that there will be a good return on the financial investment in my/my child's education	79%	70%
I feel comfortable that I/my child will find friends and enjoy the college experience	76%	71%
I feel a sense of pride that I/my child attend(s) that institution	52%	40%

It's tough for students to recognize and acknowledge the intuitive or emotional aspects of college choice, but we all know they are part of the equation.

(not at all, somewhat, very important)

First-generation college students make up nearly 25% of the UNI inquiry pool



This is a pretty typical percentage these days, and they represent a significant enrollment opportunity.

On the whole, first generation students were more likely to respond “I don’t know” when asked about the image and perceptions of Iowa colleges and universities. Yet they have the same high level of parent involvement in college choice.

Finding

3

UNI's strengths align with market demand



We've looked at the disposition of the marketplace in terms of colleges in general and UNI specifically.

Now we need to ask the question – how does UNI measure up?

What are own institutional strengths and weaknesses?

The research populations



We had four research activities that took a more interior view of UNI.

Student satisfaction surveying is an important component of marketing UNI

- Campus strengths that we can promote
- Institutional weaknesses we must assess



Current students completed the Noel-Levitz Student Satisfaction Inventory™ (SSI), which is a nationally normed instrument whose purpose is to measure student satisfaction on a range of college experiences.

Student satisfaction research validates what UNI has to offer.

It shows:

- Campus strengths that we can promote
- Institutional weaknesses we must address to meet prevent student attrition

The Student Satisfaction Inventory

613 students

Freshman	21%
Sophomore	16%
Junior	23%
Senior	26%
Other	15%
In-state	91%
Out-of-state	7%

Sample Four-Year SSI			Four-Year
Import	Satis	Gap	Import
6.12	5.21	0.91	6.1
5.79	4.80	0.99	5.6
6.25	5.29	0.96	6.3
6.09	4.90	1.19	6.1
5.90	5.15	0.75	5.9
6.28	5.45	0.83	6.2
6.08	4.92	1.16	6.1
6.19	4.50	1.69	6.1

A sample of 613 student completed the online survey representing a good mix of class levels and majors.

Students identified UNI's top strengths

ITEM
1. The overall quality of my academic major at UNI is excellent.
2. I am confident that UNI will prepare me for my chosen career path
3. I feel confident that I will be successful academically at UNI
4. Nearly all of the faculty are knowledgeable in their field.
5. UNI faculty are highly qualified in the fields they teach.
6. The campus is safe and secure for all students.
7. I can meet one-on-one with a faculty member when I need to.
8. The overall quality of UNI's academic resources and facilities is excellent.

There are 83 items on the student satisfaction survey covering all aspects of the college experience from student life and student services to the classroom experience, academic advising and intramural sports. These are the 8 that rose to the top in terms of student satisfaction.

It is very positive to see this level of endorsement for the academic experience at UNI. If a campus has a problem with say parking or cafeteria food, we think either this is not critical or this can be fixed. But a problem with the academic product is dangerous. Continuing to strive for excellence in this arena is the best thing UNI can do to ensure its future.

Strengths: Focus groups

“There are small classes taught by professors. They want me to succeed.”

“We have a lot of undergraduate students doing academic research.”

“I’m not a number. I’m a somebody.”



Here are several quotes from focus groups we conducted with students that elaborate on their perspective on UNI's faculty and academics.

The parent perspective on UNI

1. The campus is safe and secure.
2. I feel confident my child will be successful academically at UNI.
3. I am confident UNI will prepare my child for her/his chosen career path.
4. The content of the courses in your child's major is valuable.
5. The overall quality of my child's academic major at UNI is excellent.



We used the identical questions in our survey of parents – framed from the parent perspective.

These were the highest items of satisfaction for parents. Again, once we get past the physical safety issue – which is almost always number one for parents – we see satisfaction with academics taking the lead.

Enrollment decision factors for UNI students

Student Responses	UNI Mean	National Mean
Academic reputation	6.1	5.9
Cost	6.1	6.2
Financial aid	5.9	5.9
Size of institution	5.8	5.3
Geographic setting	5.5	5.5
Campus appearance	5.5	5.3
Personal attention prior to enrollment	5.5	5.2
Recommendations from family/friends	5.2	4.8

We asked students to rate 9 items in terms of the importance in the decision to enroll at UNI on a scale of 1 – 7, with 7 being the highest rating.

UNI has a great “first choice” ranking

UNI was my . . .

1st choice	80%
2nd choice	17%
3rd choice or lower	3%

The “1st choice” national norm for four-year publics is 63%.

This a very positive finding for UNI.

The ultimate question

	UNI Student	National norm (student)	UNI Parent
Overall satisfaction?	5.8	5.2	6.1
Would you do it again?	6.0	5.3	6.5

Here's the ultimate question – would you enroll at UNI if you had to do it all over again. Again, these findings are a strong endorsement of the UNI experience.

Finding

4

UNI can establish
a strong
competitive
position



We inquired to 10 competing institutions to assess their marketing materials and messages.

What is our context?

This study recorded how 10 UNI competitors responded to self-initiated inquiries over a period of approximately 12 weeks.

We inquired both by telephone and online.

1. Central College
2. Des Moines Area Community College
3. Drake University
4. Hawkeye Community College
5. Iowa State University
6. Kirkwood Community College
7. Luther College
8. Simpson College
9. University of Iowa
10. Wartburg College

Observations

All schools responded within two weeks of the initial phone inquiry.

Only 2 schools asked the phone inquirer for her email address.

Six schools sent “viewbooks.”

No competitors sent information directly aimed at parents.

For younger prospective students, parents should be considered co-purchasers in that they have great influence as to which schools their children will seriously consider. UNI should be sending personalized letters to parents regarding key marketing messages.

In our competition study, no school sent a letter authored by a faculty member

Only two schools sent major information to the phone inquirer and four sent major information to the e-mail inquirer.

No school included any personalized information regarding the major department of interest.



The Web inquirer was a male high school senior interested in business and who also requested information on scholarships. The phone inquirer was a female high school senior who was interested in teacher education and requested information about financial aid.

Given the findings of UNI's market research with inquiries and their parents regarding the importance of faculty, this represents a significant competitive opportunity for UNI.

Competitor positioning emphasizes generic educational features

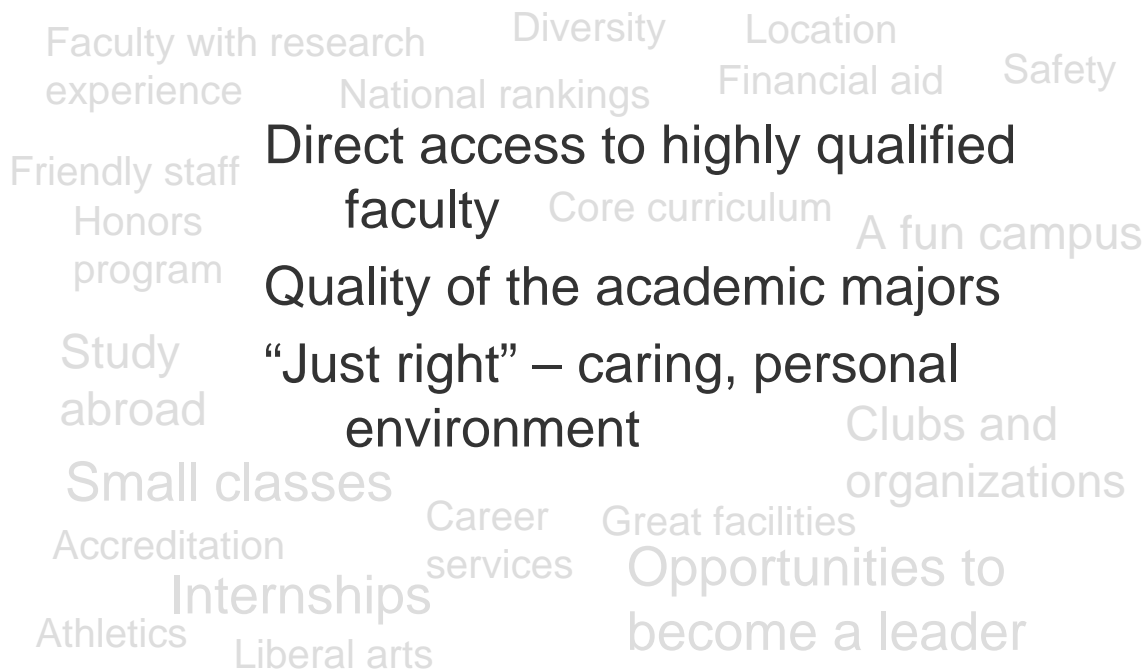
Central College	Go farther
Drake University	Think Blue
Hawkeye Comm College	More than you can imagine...
Kirkwood Comm College	Start Here. Go Anywhere!
Luther College	The Luther I know...
University of Iowa	Be remarkable
Iowa State	Enjoy the Adventure
Simpson College	What college should be
Wartburg College	Be Orange

Sometimes colleges make the mistake of assuming that because a competitor is doing it, we should be too. Looking at competitor positioning is not about copying what they are doing – it's just the opposite. It means saying something they aren't already saying – or saying it in a unique and better way.

Competitor positioning emphasizes generic educational features

Des Moines Area Comm College	6 reasons why DMACC is right for you
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UNI marketing messages



Remember our initial discussion about keeping marketing messages simple? Of all the things we could say about UNI that are true – what is most important? Based on the research we’d like you to consider these three emphases in how you market and recruit.

Every major has a story



One of the top challenges for you will likely be marketing the individual majors, It takes time and energy to do it well.

Can you answer these questions for every UNI major?

What makes the program's curriculum strong or unique? How do you develop students' skills and knowledge?

What kind of faculty do students have access to?

What opportunities are available for research, field work, independent study, travel or other experiences outside the classroom?

Are there special facilities or resources available to students? Campus clubs or organizations associated with the study area?

What employment or graduate/professional school opportunities are available for graduates?
What are recent graduates doing?

Three Conclusions



1. UNI has clear strengths that are closely aligned with the market's needs
2. UNI's top marketing messages must emphasize faculty and quality of academic majors in a caring environment
3. There are significant opportunities for surpassing competitors in marketing communications

Discussion and Next steps

