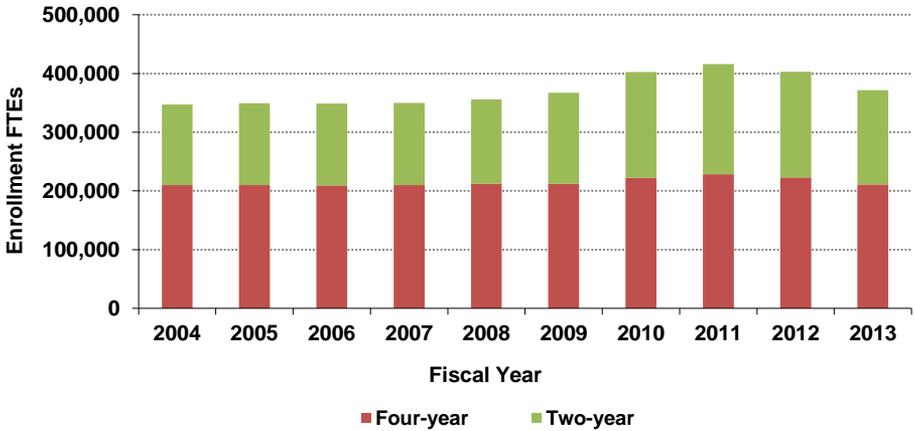


Higher Education Enrollment Decreased Again in FY 2013

Total Subsidy-Eligible FTE Students*

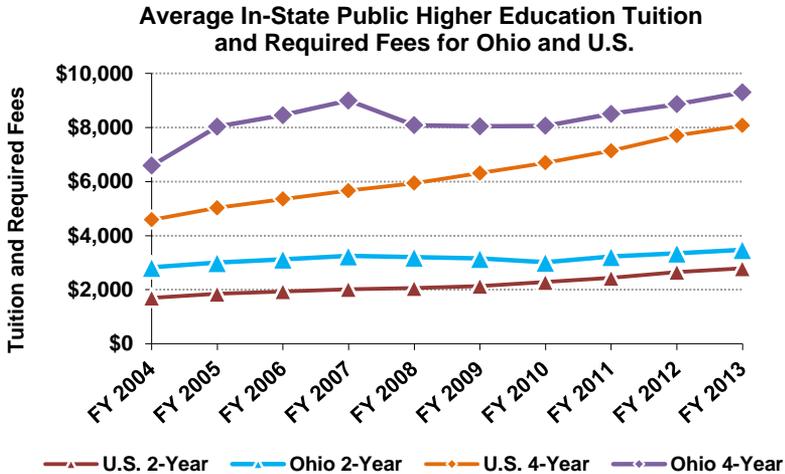


*An FTE (full-time equivalent) student is based on one student taking 15 credit hours per semester or the equivalent. Subsidy-eligible FTEs include all but out-of-state undergraduate students.

Sources: Ohio Board of Regents; State Higher Education Executive Officers (SHEEO)

- In FY 2013, total student enrollment at public colleges and universities decreased by 31,536 FTEs (8.5%) from FY 2012. Enrollment at two-year and four-year campuses decreased by 19,399 FTEs (10.8%) and 12,137 FTEs (5.4%), respectively, in that year. These decreases follow a decline of 12,935 FTEs (3.1%) in total student enrollment from FY 2011 to FY 2012.
- Over the ten years from FY 2004 to FY 2013, total student enrollment increased by 24,238 FTEs (7.0%). Of this growth, 96.8% occurred at two-year campuses.
- The enrollment decreases in FY 2012 and FY 2013 come after strong enrollment growth between FY 2008 and FY 2011, especially on two-year campuses. Total enrollment increased by 60,385 FTEs (17.0%) during that period, of which 44,405 (73.5%) occurred at two-year campuses.
- The FY 2008 to FY 2011 enrollment growth at two-year campuses may be partly due to the Great Recession. High growth in the two-year sector also occurred in prior periods of economic slowdown.
- According to a measure published by SHEEO, Ohio's five-year enrollment growth from FY 2008 to FY 2013 (6.6%) was the 11th lowest of all the states. Compared to neighboring states, Ohio's enrollment growth was higher than Michigan (4.2%) and Pennsylvania (6.2%), but lower than Indiana (9.8%), Kentucky (9.3%), and West Virginia (6.7%).

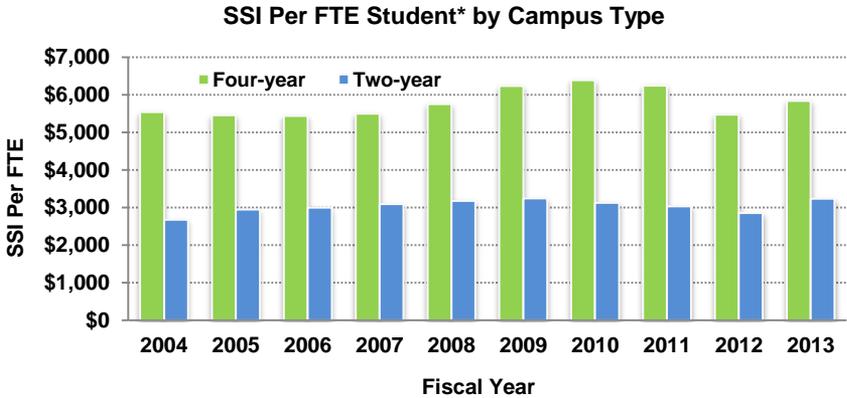
Gap Between Ohio's Average Public Higher Education Tuition and the Nation's Narrows in Recent Years



Source: National Center for Education Statistics

- After increasing from FY 2004 to FY 2007, the gap between Ohio's average public higher education tuition and required fees and the nation's average narrowed from FY 2007 to FY 2013.
- This gap reached a peak in FY 2007 for both 4-year and 2-year institutions. Ohio's averages were \$3,328 (58.7%) and \$1,232 (61.1%) higher than the nation's averages for 4-year and 2-year institutions, respectively, in that year.
- In FY 2013, Ohio's averages remain above the nation's, but by a lower amount. Ohio's averages were \$1,230 (15.2%) and \$688 (24.6%) higher than the nation's averages for 4-year and 2-year institutions, respectively, in FY 2013.
- Compared to other states, Ohio's ranking has dropped from 5th and 7th highest in FY 2007 to 15th and 22nd highest in FY 2013 for 4-year and 2-year institutions, respectively.
- From FY 2004 to FY 2013, average tuition and fees at 4-year institutions in Ohio increased by \$2,712 (41.2%), from \$6,589 to \$9,301. Tuition and fees at Ohio 2-year institutions increased by \$657 (23.3%), from \$2,823 to \$3,480.
- As tuition and fees at 4-year institutions increased faster than at 2-year institutions, the difference between the two types of institutions has increased 54.5% from \$3,766 in FY 2004 to \$5,821 in FY 2013.
- The General Assembly has imposed caps on annual increases in tuition every year since FY 2004. For FY 2012 and FY 2013, the cap on in-state undergraduate tuition increases was 3.5% per year.

State Share of Instruction Per Student Increased in FY 2013



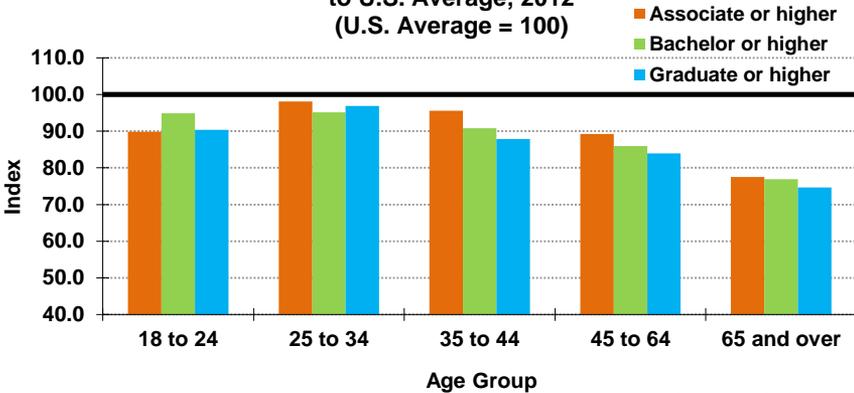
*An FTE (full-time equivalent) student takes the equivalent of 15 credit hours per semester. Out-of-state undergraduate students are not included as they are not eligible for state subsidy.

Source: Ohio Board of Regents

- In FY 2013, the State Share of Instruction (SSI) per FTE student was \$5,842 for four-year campuses, an increase of 6.7% from FY 2012. This was the second largest increase, behind the 8.3% increase in FY 2009, during the ten-year period from FY 2004 to FY 2013. SSI per FTE student for two-year campuses increased by 13.1% to \$3,234 in FY 2013, which was the largest increase during the same ten-year period.
- SSI is the main state subsidy to public colleges and universities to help support the institutions' core academic activities. Total SSI funding increased by 0.9% in FY 2013 to \$1.75 billion. The increases in SSI per student in FY 2013 were mainly due to declining enrollment. Enrollment decreased at both four-year (5.4%) and two-year (10.8%) campuses in FY 2013.
- FY 2012 saw the largest decrease in SSI per student for both four-year (12.4%) and two-year (5.8%) campuses over the past decade, due to the loss of federal stimulus funding through the American Recovery and Reinvestment Act, which provided \$287.8 million for SSI in FY 2011.
- SSI allocations to four-year campuses are higher than those to two-year campuses because four-year campuses offer higher cost baccalaureate, graduate, and professional degree courses.
- Most of the SSI is allocated to campuses through formulas. Prior to FY 2010, SSI was largely based on each campus's enrollment and courses offered. Starting in FY 2010, the formula was changed to include performance incentives for areas such as student course and degree completion.

Postsecondary Educational Attainment of Young Ohioans Approaches National Average

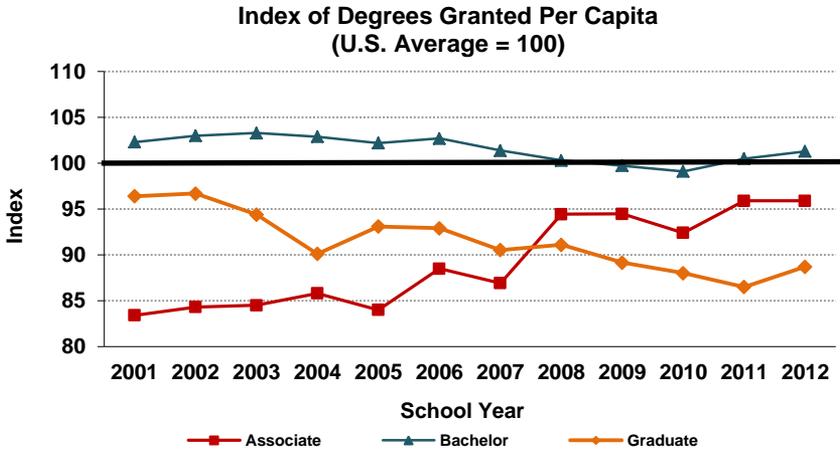
Ohio's Educational Attainment Compared to U.S. Average, 2012
(U.S. Average = 100)



Source: U.S. Census Bureau

- This index compares Ohio's educational attainment to the national average. An index score of 95 indicates that Ohio is 5% below the national average.
- Although the percentage of Ohioans with postsecondary degrees is below the national average for all age groups, the percentages for younger Ohioans are closer to the national average than those for older Ohioans.
- For each age group shown in the chart above (beginning with 18 to 24 year olds), the index for Ohioans with at least a bachelor's degree is 94.9, 95.2, 90.8, 85.9, and 76.9, respectively.
- The percentage of Ohioans within each age group who hold at least a bachelor's degree is 9.0%, 30.7%, 29.6%, 24.8%, and 17.9%, respectively, compared to the national average of 9.4%, 32.2%, 32.6%, 28.9%, and 23.2%.
- Compared to all states plus Washington D.C. and Puerto Rico, Ohio ranks 21st for the percentage of people aged 18 to 24 with at least a bachelor's degree. Ohio ranks 26th for ages 25 to 34, 35th for ages 35 to 44, 41st for ages 45 to 64, and 45th for ages 65 and over.
- Ohio's relatively low educational attainment for older age groups may reflect the state's strong industrial and agricultural economic history. These industries often did not require a college education for many types of jobs.
- Aggregating over all age groups, 23.2% of Ohioans had at least a bachelor's degree in 2012. Ohio ranks 38th in this percentage; the national average is 26.5%. Compared with contiguous states, Ohio's percentage is higher than Indiana (21.4%), Kentucky (19.9%), and West Virginia (17.4%), but lower than Pennsylvania (25.8%) and Michigan (23.7%).

Ohio's Colleges and Universities Rise Above National Average in the Granting of Bachelor's Degrees



Sources: NCES; U.S. Census Bureau

- This index compares degrees granted by Ohio's colleges and universities to the national average on a per capita basis. An index score of 105 indicates that Ohio is 5% above the national average; an index score of 95 indicates that Ohio is 5% below the national average.
- In 2012, the number of bachelor's degrees granted per capita in Ohio was about 1.3% above the national average. Except for 2009 and 2010, Ohio has been above the national average on this indicator in every year since 2001.
- In 2012, the number of associate degrees granted per capita in Ohio was 4.1% below the national average. Ohio has gotten closer to the national average on this indicator over the last decade. In 2001, Ohio's associate degrees per capita were 16.6% below the national average.
- In 2012, the number of graduate degrees granted per capita in Ohio was 11.3% below the national average. Although Ohio experienced an increase in this indicator from 2011 to 2012, the state has generally moved away from the national average over the last decade. Ohio's graduate degrees per capita were 3.6% below the national average in 2001.
- On a per capita basis, in 2012 Ohio ranked 22nd highest among the states for associate degrees granted and 26th for both bachelor's and graduate degrees. Aggregating all postsecondary degrees granted, Ohio ranked 25th in the nation.
- In 2012, Ohio granted 35,871 associate degrees, 66,736 bachelor's degrees, and 30,140 graduate degrees. Public institutions accounted for 66.6%, 66.9%, and 65.4%, respectively, of the various degrees granted in the state.