COMMUNITY PERCEPTIONS SURVEY

CONDUCTED FOR SACRAMENTO STATE

PRESENTED BY TIMOTHY McLARNEY, PH.D.

7/21/2014
PURPOSE OF STUDY

- To understand existing and unbiased perceptions of Sacramento State
- Create a baseline for measuring changes in perception over time
- Develop foundation for the “Sacramento State Story”
- Part of first phase of Brand & Identity Enhancement Project
This project is to clarify and strengthen the University’s existing brand, including the unification of written and visual communications.

- April 2014: Conducting research
- Summer/Fall 2014: Clarifying strategy, designing identity, creating touchpoints
- January 2015: Managing assets

Rollout and Training
Brand Tool Kit
- Brand positioning
- Key messages
- Design standards, templates
- Verbal and visual guidelines

Perception Survey
Strategic Plan
METHODOLOGY OF STUDY

- Telephone survey
  - 16 minutes
  - English & Spanish
- Conducted April 2nd to April 11th, 2014
- Random Digit Dial (land & cell) with screeners
- 500 residents 16+ years within counties of Sacramento, Yolo, Placer, El Dorado, Yuba and Sutter
- Overall margin of error of ± 4.38%
UNAIDED RECALL OF UNIVERSITIES IN AREA

Sacramento State/Cal State Sacramento: 64.8%
Davis/University of California Davis: 53.6%
Chico State/Cal State Chico: 9.0%
Not sure / Cannot think of any: 6.4%
University of Phoenix: 3.9%
Sierra College: 2.5%
Cal Poly/Cal State San Luis Obispo: 2.5%
Stanislaus State/Cal State Stanislaus: 2.0%
Merced/University of California Merced: 1.8%
University of Berkeley: 1.6%
Stanford University: 1.5%
William Jessup University: 1.5%
University of Pacific: 1.4%
University of CA San Francisco: 1.3%
American River College: 1.3%
University of CA Los Angeles: 1.0%
Drexel University: 0.8%
Fresno State/Cal State Fresno: 0.3%

% Respondents
UNAIDED AWARENESS OF SAC STATE BY AGE & EDUCATION

% Respondents With Unaided Recall of Sacramento State

<table>
<thead>
<tr>
<th>Age (QD4)</th>
<th>16 to 24</th>
<th>25 to 29</th>
<th>30 to 39</th>
<th>40 to 49</th>
<th>50 to 64</th>
<th>65 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 to 24</td>
<td>55.7</td>
<td>67.9</td>
<td>68.8</td>
<td>61.9</td>
<td>71.9</td>
<td>64.9</td>
</tr>
<tr>
<td>25 to 29</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 to 39</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40 to 49</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50 to 64</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>65 or older</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education Level (QD5)</th>
<th>Less than HS</th>
<th>HS graduate</th>
<th>College (&lt; 4 yr)</th>
<th>College grad (4 yr)</th>
<th>Grad school, degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 to 24</td>
<td>59.1</td>
<td>55.0</td>
<td>68.3</td>
<td>66.4</td>
<td>69.0</td>
</tr>
<tr>
<td>25 to 29</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 to 39</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40 to 49</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50 to 64</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>65 or older</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
UNAIDED AWARENESS OF SAC STATE BY ETHNICITY & COUNTY

<table>
<thead>
<tr>
<th>Ethnicity (QD8)</th>
<th>% Respondents With Unaided Recall of Sacramento State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caucasian</td>
<td>66.8</td>
</tr>
<tr>
<td>Latino</td>
<td>58.7</td>
</tr>
<tr>
<td>African American</td>
<td>69.2</td>
</tr>
<tr>
<td>Asian American</td>
<td>59.3</td>
</tr>
<tr>
<td>Other</td>
<td>67.5</td>
</tr>
<tr>
<td>County of Residence (QSC1)</td>
<td></td>
</tr>
<tr>
<td>Sacramento</td>
<td>71.4</td>
</tr>
<tr>
<td>Yolo</td>
<td>44.6</td>
</tr>
<tr>
<td>Placer</td>
<td>53.6</td>
</tr>
<tr>
<td>El Dorado</td>
<td>73.7</td>
</tr>
<tr>
<td>Sutter &amp; Yuba</td>
<td>46.5</td>
</tr>
</tbody>
</table>
FAMILIARITY WITH UNIVERSITIES

<table>
<thead>
<tr>
<th>University</th>
<th>Very familiar</th>
<th>Somewhat familiar</th>
<th>Slightly familiar</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Davis</td>
<td>47.1</td>
<td>26.0</td>
<td>12.8</td>
</tr>
<tr>
<td>Sacramento State</td>
<td>49.1</td>
<td>25.0</td>
<td>10.3</td>
</tr>
<tr>
<td>Chico State</td>
<td>23.9</td>
<td>30.2</td>
<td>15.7</td>
</tr>
</tbody>
</table>

% Respondents

0 10 20 30 40 50 60 70 80 90 100

% Respondents
QUALITY OF EDUCATION

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Very poor</th>
<th>Not sure</th>
<th>Refused</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Davis</td>
<td>52.8</td>
<td>28.0</td>
<td>21.2</td>
<td>13.9</td>
<td>10.8</td>
<td>21</td>
<td>15.4</td>
</tr>
<tr>
<td>Sacramento State</td>
<td>21.2</td>
<td>48.9</td>
<td>14.6</td>
<td>32.4</td>
<td>15.4</td>
<td>21</td>
<td>15.4</td>
</tr>
<tr>
<td>Chico State</td>
<td>11.2</td>
<td>35.0</td>
<td>14.6</td>
<td>41.1</td>
<td>32.4</td>
<td>15.4</td>
<td>15.4</td>
</tr>
</tbody>
</table>
QUALITY OF EDUCATION AMONG THOSE VERY FAMILIAR

% Respondents Who Are Very Familiar With University and Provided Opinion

- Excellent
- Good
- Fair
- Poor
- Very poor

UC Davis
- 74.6
- 23.8
- 2

Sacramento State
- 32.1
- 57.4
- 8.8
- 1

Chico State
- 29.3
- 50.8
- 14.0
- 6
OPINION OF SACRAMENTO STATE

- Very favorable: 28.8
- Somewhat favorable: 20.1
- Somewhat unfavorable: 2.4
- Very unfavorable: 0.8
- No opinion: 47.8
NEGATIVE DESCRIPTORS

- Not sure / Nothing comes to mind: 60.8%
- Parking issues: 5.3%
- Overcrowded: 5.2%
- Expensive: 5.2%
- General negative comment about curriculum: 5.0%
- Poor quality of education: 4.6%
- Bad location: 3.0%
- Negative comment in general: 2.9%
- Bad school administration: 2.6%
- Poor security, safety: 2.3%
- Commuter school: 2.3%
- Buildings, facilities in need of renovation: 1.7%
- General negative comment about student housing: 1.0%
- Lack of funding: 0.9%
- Not enough teachers: 0.9%
- Traffic congestion: 0.8%
- Need more public transportation: 0.6%
RECOMMEND SACRAMENTO STATE?

- Yes, would recommend Sac State: 77.1%
- Not sure: 7.4%
- Would not recommend Sac State: 15.1%
- Refused: 0.4%
PRIORITIES FOR AREA UNIVERSITIES

1. Provide a challenging, high quality education
2. Teach real-world skills needed to succeed in today’s job market
3. Be a good educational value for the money
4. Provide cutting-edge technology and science research
5. Enroll students who are committed to their education
6. Have faculty that are leaders in their fields
7. Have a beautiful, safe, and inviting campus
8. Be accessible to students who choose to commute to school
9. Provide a high quality college experience to those who live on campus
10. Encourage students and faculty to give back to the community
11. Positively impact local economy and economic health of the region
12. Be a top-tier university in the region
13. Encourage students to be entrepreneurial
14. Offer arts, culture, and activities for the community
15. Provide the public with use of campus facilities and amenities
16. Provide exciting athletics programs

% Respondents
High priority | Medium priority

- Provide a challenging, high quality education: 86.7 | 9.4
- Teach real-world skills needed to succeed in today’s job market: 81.8 | 13.8
- Be a good educational value for the money: 81.1 | 13.3
- Provide cutting-edge technology and science research: 69.7 | 23.7
- Enroll students who are committed to their education: 77.4 | 15.6
- Have faculty that are leaders in their fields: 68.6 | 22.8
- Have a beautiful, safe, and inviting campus: 59.5 | 31.8
- Be accessible to students who choose to commute to school: 62.1 | 29.1
- Provide a high quality college experience to those who live on campus: 61.5 | 25.7
- Encourage students and faculty to give back to the community: 50.2 | 36.9
- Positively impact local economy and economic health of the region: 51.5 | 34.7
- Be a top-tier university in the region: 52.5 | 33.4
- Encourage students to be entrepreneurial: 46.3 | 38.8
- Offer arts, culture, and activities for the community: 41.4 | 41.8
- Provide the public with use of campus facilities and amenities: 36.9 | 39.6
- Provide exciting athletics programs: 31.3 | 44.1
**SACRAMENTO STATE PERFORMANCE**

<table>
<thead>
<tr>
<th>Service Provided</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Very poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Being accessible to students who choose to commute to school</td>
<td>31.8</td>
<td>48.5</td>
<td>16.8</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Providing a challenging, high quality education</td>
<td>23.9</td>
<td>54.4</td>
<td>19.0</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Enrolling students who are committed to their education</td>
<td>22.6</td>
<td>52.3</td>
<td>21.7</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Providing high quality college experience to those living on campus</td>
<td>21.6</td>
<td>52.8</td>
<td>22.0</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Having a beautiful, safe, and inviting campus</td>
<td>26.4</td>
<td>47.7</td>
<td>21.3</td>
<td>3.8</td>
<td></td>
</tr>
<tr>
<td>Being a good educational value for the money</td>
<td>23.0</td>
<td>48.5</td>
<td>21.2</td>
<td>5.9</td>
<td></td>
</tr>
<tr>
<td>Having faculty that are leaders in their fields</td>
<td>18.1</td>
<td>53.2</td>
<td>23.4</td>
<td>4.9</td>
<td></td>
</tr>
<tr>
<td>Teaching real-world skills needed to succeed in today's job market</td>
<td>22.2</td>
<td>49.0</td>
<td>23.5</td>
<td>4.9</td>
<td></td>
</tr>
<tr>
<td>Being a top-tier university in the region</td>
<td>17.4</td>
<td>50.3</td>
<td>26.1</td>
<td>4.8</td>
<td></td>
</tr>
<tr>
<td>Encouraging students and faculty to give back to the community</td>
<td>17.1</td>
<td>50.5</td>
<td>27.1</td>
<td>3.9</td>
<td></td>
</tr>
<tr>
<td>Positively impacting local economy, economic health of the region</td>
<td>19.1</td>
<td>48.4</td>
<td>26.7</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>Encouraging students to be entrepreneurial</td>
<td>14.5</td>
<td>51.8</td>
<td>28.3</td>
<td>4.8</td>
<td></td>
</tr>
<tr>
<td>Providing the public with use of campus facilities and amenities</td>
<td>18.4</td>
<td>47.7</td>
<td>27.8</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>Providing exciting athletics programs</td>
<td>18.1</td>
<td>47.4</td>
<td>28.3</td>
<td>5.2</td>
<td></td>
</tr>
<tr>
<td>Providing cutting-edge technology and science research</td>
<td>17.4</td>
<td>47.7</td>
<td>27.2</td>
<td>5.9</td>
<td></td>
</tr>
<tr>
<td>Offering arts, culture, and activities for the community</td>
<td>17.6</td>
<td>47.1</td>
<td>28.8</td>
<td>5.6</td>
<td></td>
</tr>
</tbody>
</table>
# EXPECTATIONS MATRIX

<table>
<thead>
<tr>
<th>Sacramento State Performance</th>
<th>Priority For Universities in Area</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not a Priority</td>
</tr>
<tr>
<td>Excellent</td>
<td>Exceeding expectations</td>
</tr>
<tr>
<td>Good</td>
<td>Exceeding expectations</td>
</tr>
<tr>
<td>Fair</td>
<td>Meeting expectations</td>
</tr>
<tr>
<td>Poor or Very Poor</td>
<td>Meeting expectations</td>
</tr>
<tr>
<td></td>
<td>Meeting expectations</td>
</tr>
<tr>
<td></td>
<td>Meeting expectations</td>
</tr>
<tr>
<td></td>
<td>Not meeting expectations, severely</td>
</tr>
<tr>
<td></td>
<td>Not meeting expectations, severely</td>
</tr>
</tbody>
</table>

**Sacramento State Performance**

- Excellent
- Good
- Fair
- Poor or Very Poor

**Priority For Universities in Area**

- Not a Priority
- Low Priority
- Medium Priority
- High Priority
MEETING EXPECTATIONS

- Providing cutting-edge technology and science research
- Offering arts, culture, and activities for the community
- Being a top-tier university in the region
- Encouraging students to be entrepreneurial
- Teaching real-world skills needed to succeed in today's job market
- **Being a good educational value for the money**
- Encouraging students and faculty to give back to the community
- Positively impacting local economy, economic health of the region
- Providing exciting athletics programs
- Providing the public with use of campus facilities and amenities
- **Having faculty that are leaders in their fields**
- Having a beautiful, safe, and inviting campus
- **Enrolling students who are committed to their education**
- Providing high quality college experience to those living on campus
- **Providing a challenging, high quality education**
- Being accessible to students who choose to commute to school

**Respondents Who Provided Opinion**

- Exceeding expectations
- Meeting expectations
-Marginally meeting expectations
- Not meeting expectations
- Severely not meeting expectations
REMEMBER ABOUT STORY, AD OR PSA

% Respondents Who Encountered Info in Past Year

- Not sure / Cannot recall: 46.7%
- Sports programs: 9.7%
- Safety concerns: 7.3%
- Diversity of programs, events: 6.4%
- Continuing education programs: 4.6%
- MBA program: 4.1%
- Successful alumni: 3.8%
- Recruiting youth, new students: 3.7%
- Theater program: 3.2%
- Tuition, fees: 3.1%
- Multicultural, ethnic diversity: 2.5%
- Music programs, events: 2.4%
- Providing good education: 2.1%
- Enrollment: 2.1%
- School campus: 2.1%
- New facilities: 1.8%
- Inspirational speakers: 1.2%
- Entrepreneurship, business: 1.2%
- Financial service, assistance offers: 1.0%
- Transfer program: 1.0%
KEY FINDINGS

- Public awareness of Sac State is very high
  - But lowest among key markets: 16 to 24 year olds & Households with teenager

- Among those with an opinion of Sac State, favorable opinions outnumber unfavorable 15 to 1
  - Nearly half of residents are not familiar enough with Sac State to form an opinion of the University

- Clear priority of expectations for local university
  - Providing a challenging, high-quality education
  - Teaching real-world skills
  - Being a good educational value for the money
  - Providing cutting-edge technology and science research
NEXT STEPS

- Explore options and build strategies to increase awareness among key markets
  - 16 to 24 year olds, households with teenager
- Seek to form opinions among those with none
  - 22 percent that are “very familiar” with Sacramento State were unable to give descriptor
- Develop messages addressing priority expectations for local universities through *Brand & Identity Enhancement Project*
  - Bridge perception gaps for Sacramento State
COMMUNITY PERCEPTIONS SURVEY

CONDUCTED FOR SACRAMENTO STATE

PRESENTED BY TIMOTHY MCLARNEY, PH.D.

7/21/2014