

California Community Colleges

Baseline Brand Awareness

May 2021

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Highlights

Highlights

Brand metrics

- Community colleges have a high unaided awareness among Students (both HS Students and California Community Colleges Students) and Parents. Aided awareness is also higher among these groups.
- Knowledge is highest among California Community Colleges Students and four in 10 are very likely to recommend their community college.
- Consideration is highest among parents and fairly low among High School Students and Prospects.
- Affordability is the main benefit driving consideration. Those not considering a community college feel it is not a good fit for them, are looking for other programs and prefer a four-year degree.
- Both advertising and word-of-mouth have a positive impact on consideration.
- Awareness of various programs is fairly high, with certificate or 2-year program having the highest awareness and knowledge.
- All groups recognize that California community colleges offer quality, breadth and equity.

Highlights

Advertising and Information

- About a third of respondents recall seeing an ad for the California Community Colleges. HS Students have the lowest recall.
- Career education and enrollment are the topics most remembered by those who saw the ads.
- Family and friends are an important source of information about California community colleges for all groups. Students also hear about California community colleges through teachers and counselors. Prospects and Parents also rely on media.
- For all groups the internet is the best way to get information about California community colleges.
- All groups prefer email and websites to receive college information.
- Media consumption differs between the groups with the younger groups using more social media and the older groups using more traditional media.

Recommendations

- Awareness and favorability of California Community Colleges are high.
- This is both a great place to start and also means that moving the needle on these metrics will require extra effort and investment.
- We recommend that you focus on Consideration and Recommendation as the key metrics to improve upon.
- We recommend that you continue to deliver on, and reinforce, specific messages that resonate with your different audiences, such as affordability, diversity, opportunity, career training and transfer to 4-year degree.
- Your target groups have different media consumption behaviors than each other and also than in the past. There is an opportunity to evaluate media delivery to reach your targets where they are. The media consumption of high school students has evolved with new media trends (e.g., TikTok, streaming services).
- Word-of-mouth is important to improve consideration. We recommend campaigns that reinforce word-of-mouth to increase awareness and consideration.

Background

Objectives

- Conduct a brand awareness research study for the California Community Colleges among current and prospective students, as well as influencers.
- Establish a baseline for a new cross-campaign brand and will set up to track future messaging for all programs including financial aid, career education and transfer options.

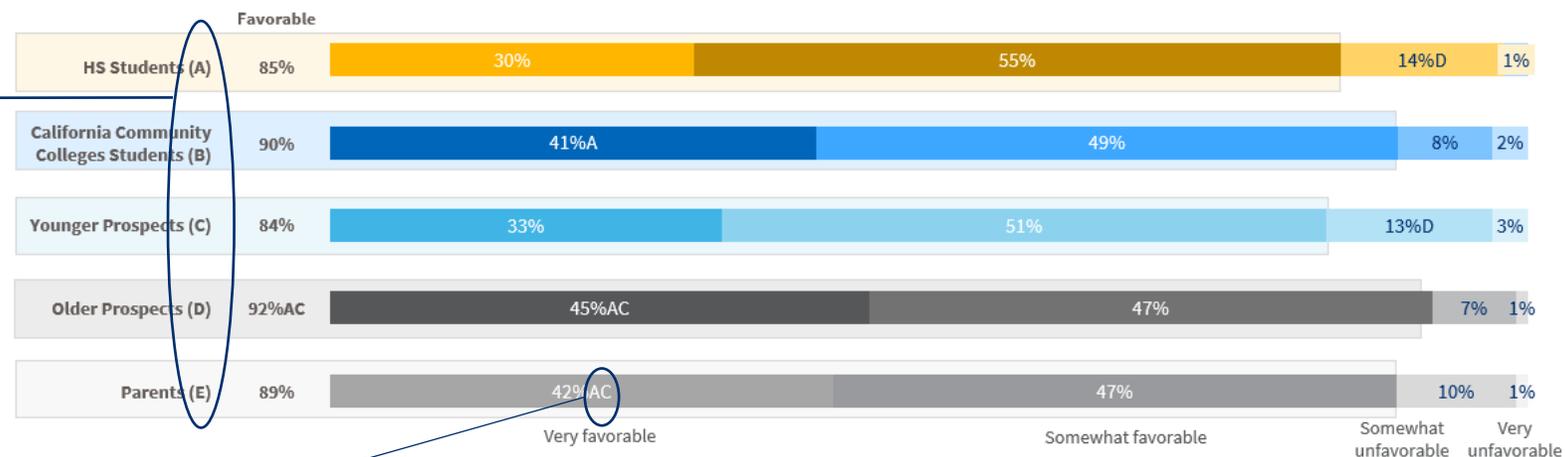
- The demographic profile of the sample is in the appendix.
- Details on quotas are in the appendix.

Methodology

- The study was conducted online between March 3, 2021 and April 6, 2021 and was approximately 10 minutes in length.
- To achieve the target quotas for lower incidence groups, additional phone recruiting was conducted.
- There were 1,000 completed surveys among independent, third-party sample:
 - High school students 200
 - California Community Colleges students 200
 - Younger prospective students 200
 - Older prospective students 200
 - Parents 200
- Quota groups were set for each population, and targeted efforts were made to include a variety of ethnicities (African Americans, Latinx, AAPI and Caucasians/American Indians), genders, and geographies.
- 100 completed online surveys among high school students in the Inland Empire area.

Note on Reading this Report

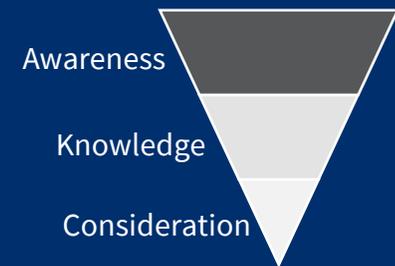
To help compare groups, each group in this report has been assigned a letter from A to E



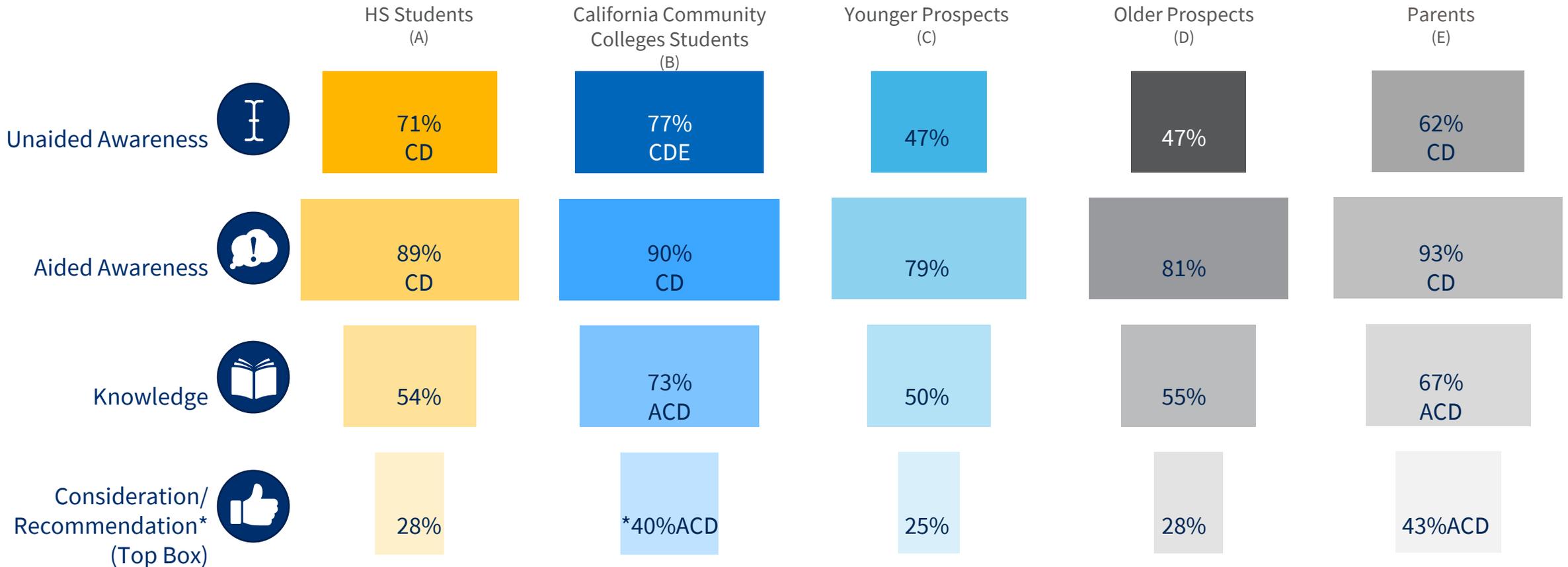
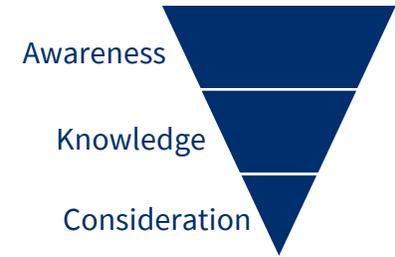
A/B/C/D/E letters indicate a number is statistically significantly higher than other group(s) referenced at 95% confidence

- For Example: 42%AC means that significantly more Parents than both HS Students and Younger Prospects are 'Very Favorable' towards California Community Colleges.

Brand Funnel



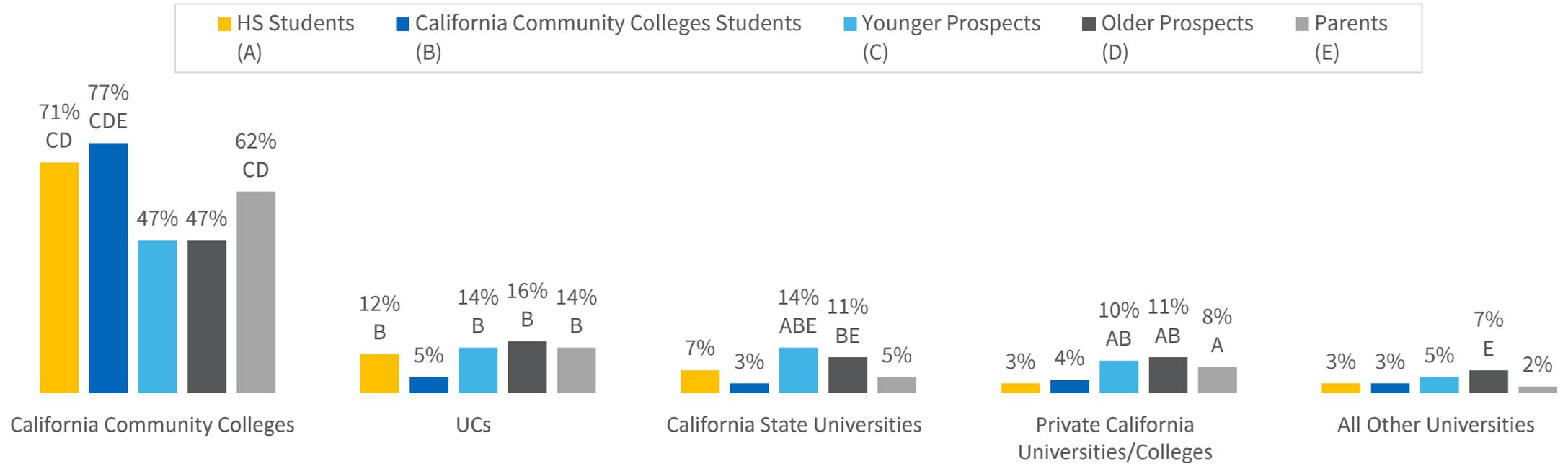
Brand funnel





Students are more aware of local community colleges than Prospects or Parents

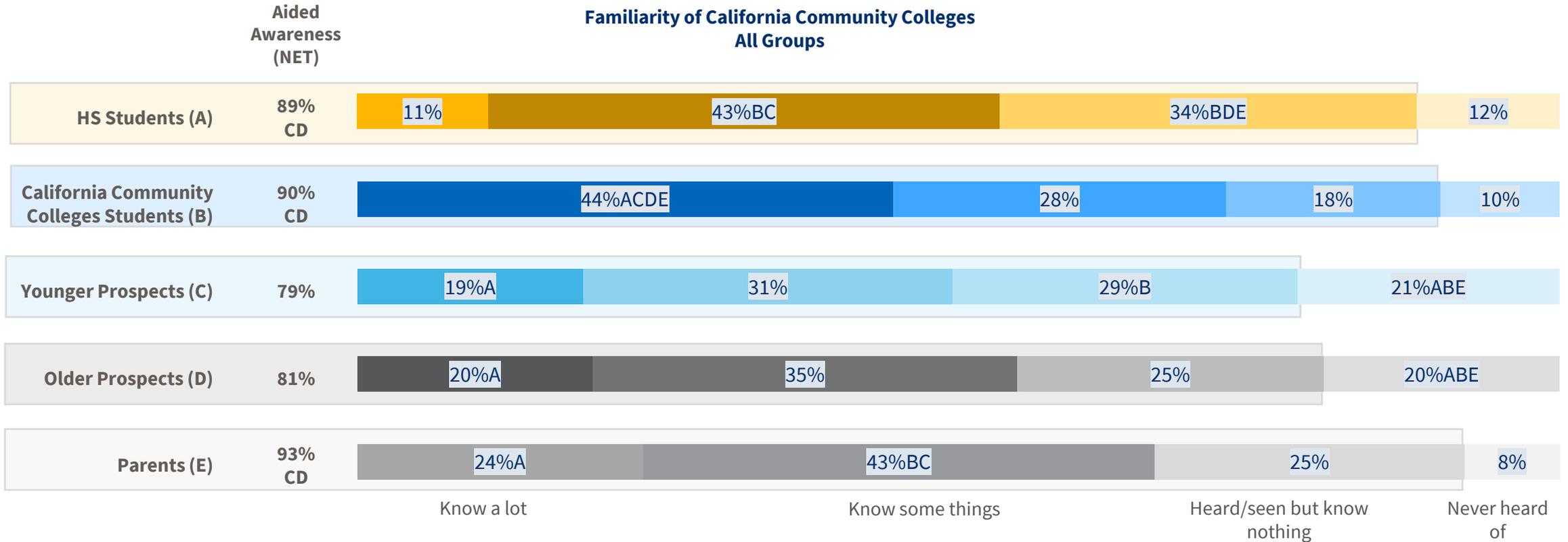
Unaided Awareness: Name of Local College
All Groups



Students are more aware of local community colleges than Prospects or Parents

	HS Students (A)	California Community Colleges Students (B)	Younger Prospects (C)	Older Prospects (D)	Parents (E)
California Community Colleges	71%	77%	47%	47%	62%
UCs	12%	5%	14%	16%	14%
California State Universities	7%	3%	14%	11%	5%
Private California Universities/colleges	3%	4%	10%	11%	8%
All other universities	3%	3%	5%	7%	2%
Other	2%	3%	3%	1%	7%

Awareness of California Community Colleges is very high especially among Students and Parents



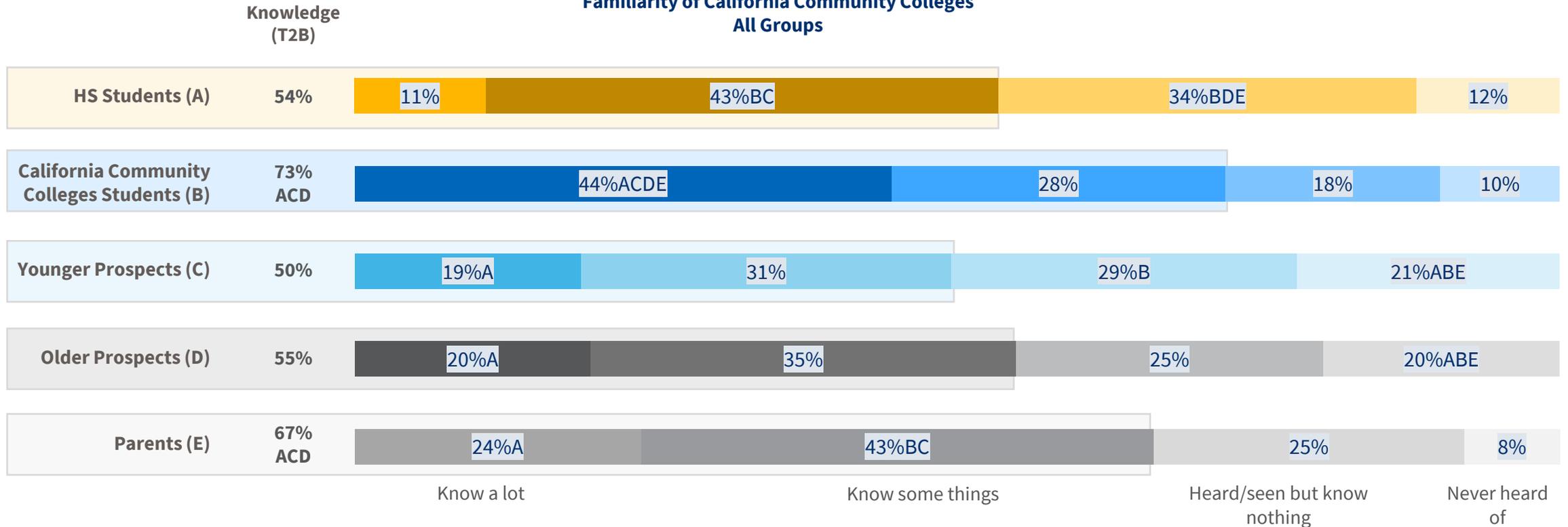
Awareness of California Community Colleges is very high especially among Students and Parents

	I know a lot about the California Community Colleges (4)	I have heard or seen of this name before and know some things about it (3)	I have heard or seen of this name before but don't know anything about it (2)	I have never heard of this name before today (1)
Parents	24%	43%	26%	8%
Older Pros	20%	36%	26%	20%
Younger Pros	19%	31%	29%	22%
Community College	45%	28%	18%	10%
HS students	11%	43%	35%	12%

Knowledge is highest among California Community Colleges Students and Parents

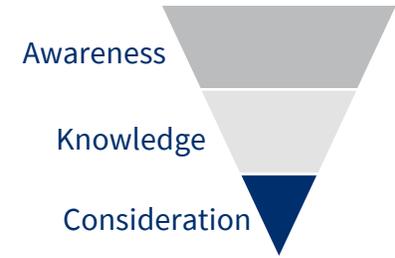


Familiarity of California Community Colleges
All Groups



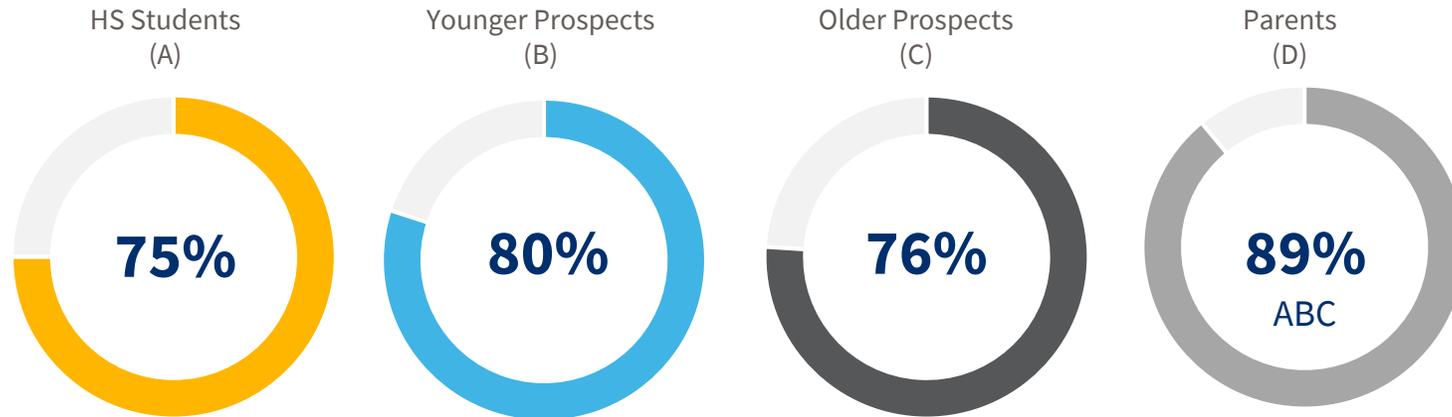
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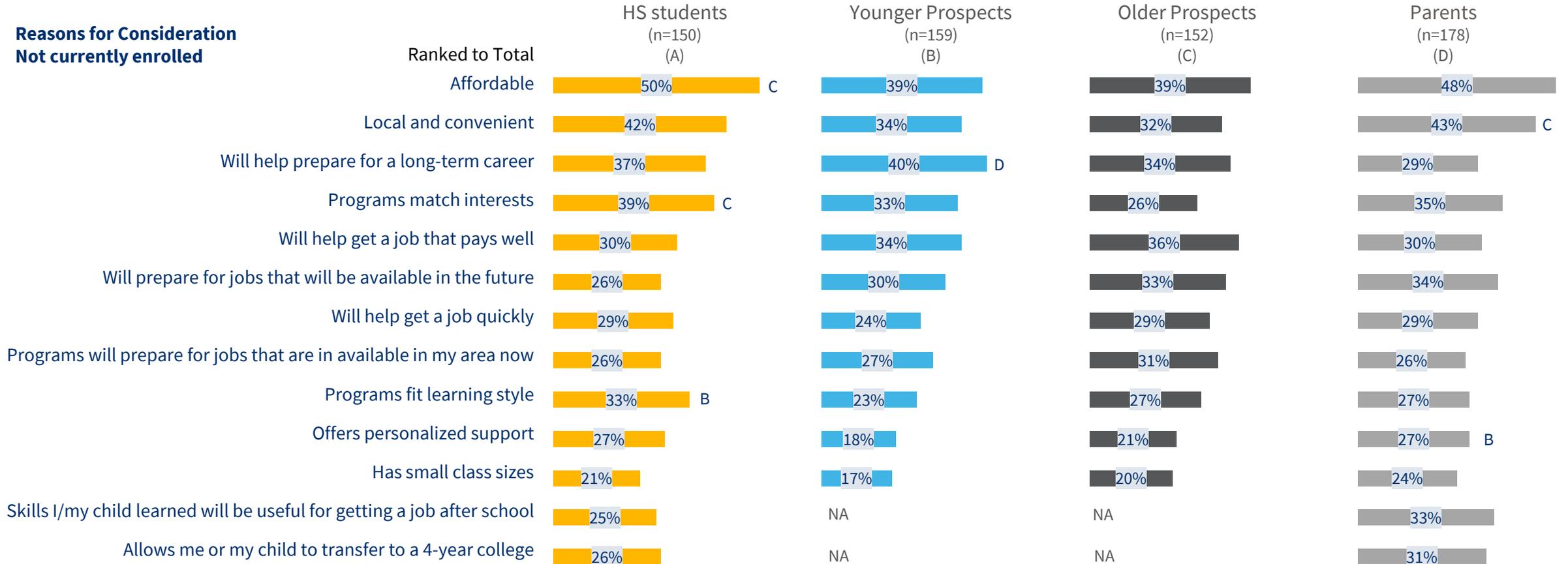
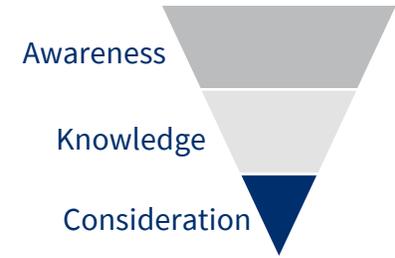
Consideration is highest among Parents

**Consideration: Enrollment
Not currently enrolled**

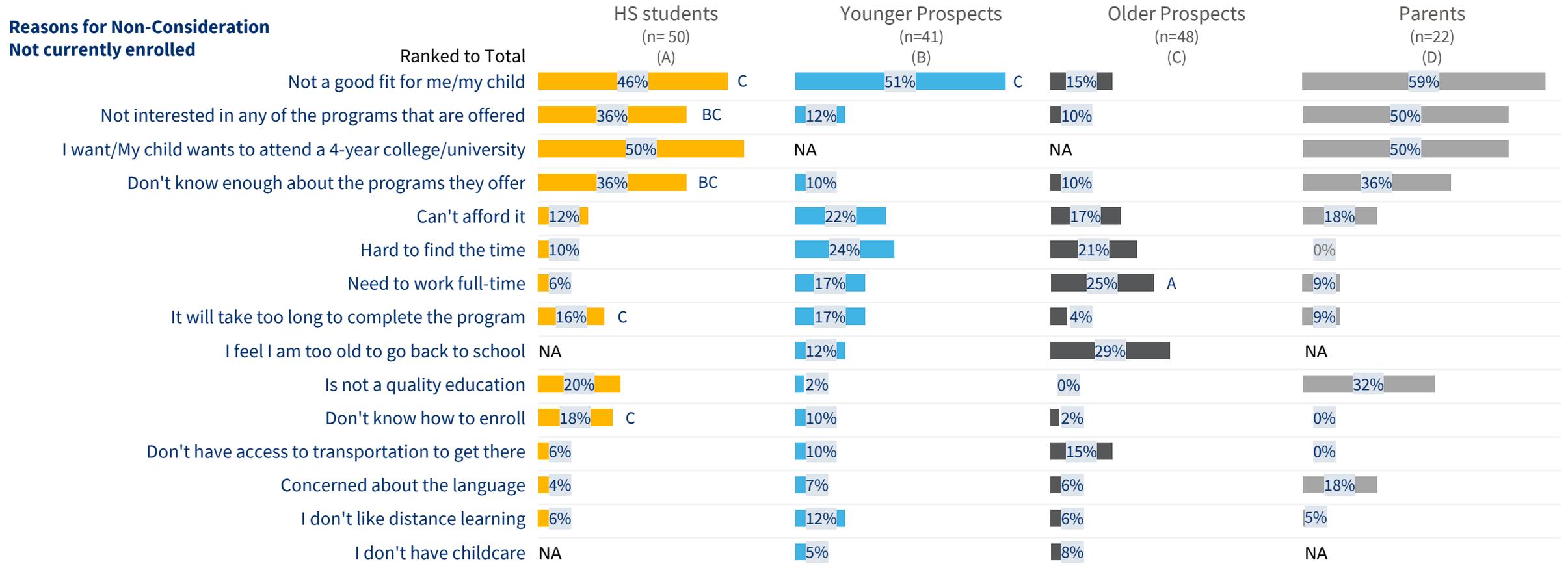
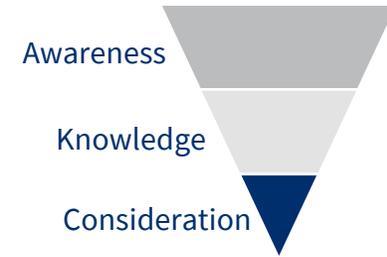


	HS Students (A)	Younger Prospects (B)	Older Prospects (C)	Parents (D)
Not Currently Enrolled	75%	80%	76%	89%
Very Likely	28%	25%	28%	43%ABC
Somewhat Likely	47%	55%	48%	46%

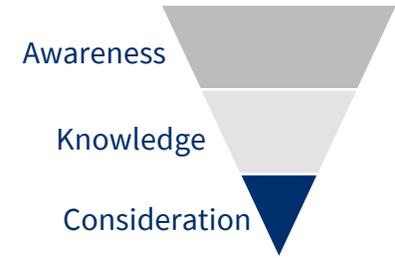
Affordability is driving consideration to enroll



Those who do not consider enrolling feel it is not a good fit; they want programs not offered or a 4-year college

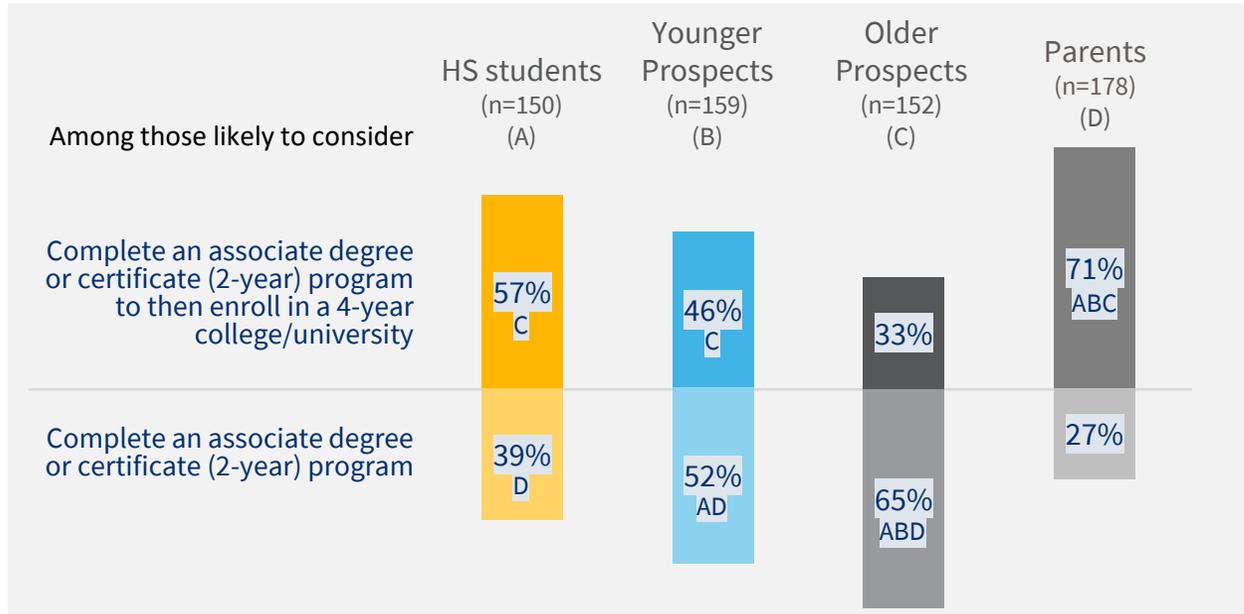


Students and Parents see enrolling in a community college as a springboard for transferring to a 4-year college, while Prospects are looking for a 2-year degree



Intent on Transferring All Groups

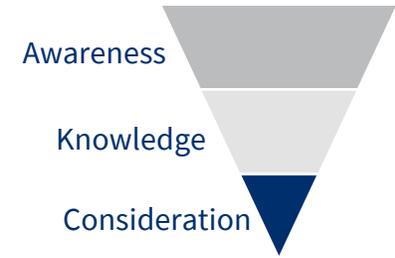
Primary Goal



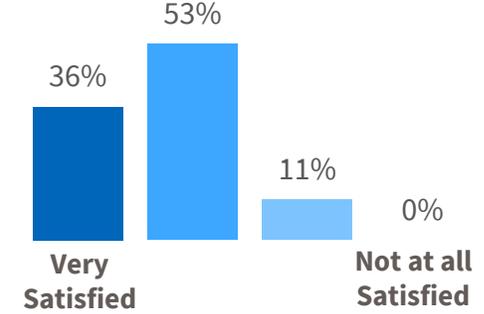
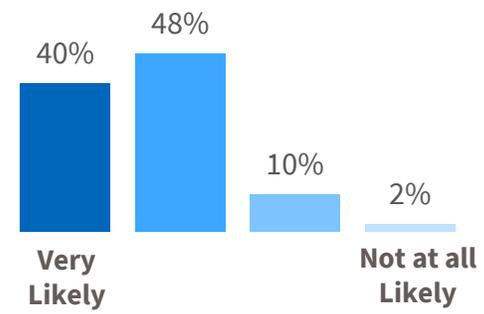
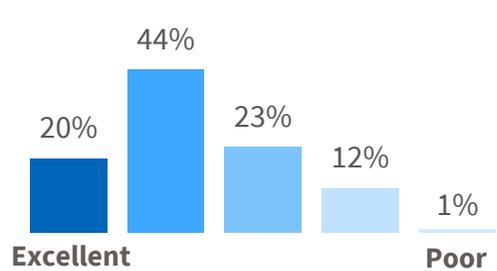
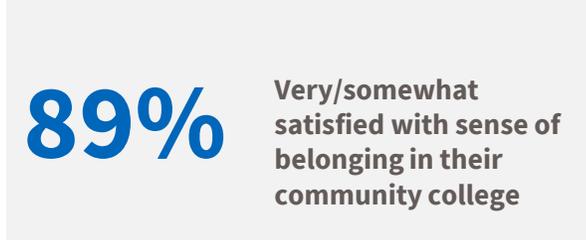
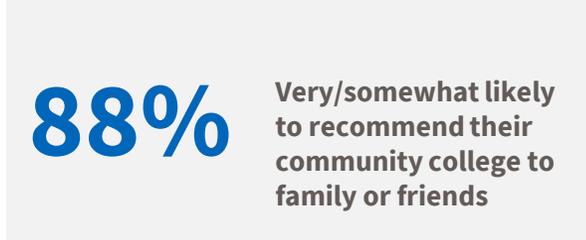
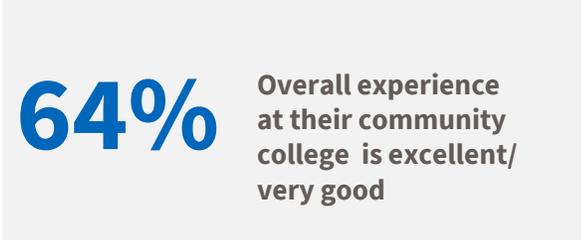
Transfer Intent



California Community Colleges Students are satisfied with their experience and likely to recommend attending a community college



Evaluation of California Community Colleges California Community Colleges Students



	Excellent	Very Good	Good	Fair	Poor
CCC Students	20%	44%	23%	12%	1%

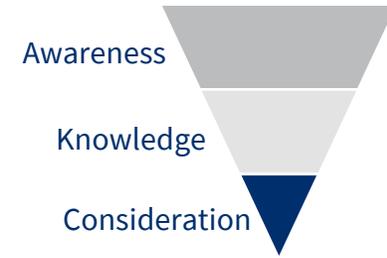
	Very Likely	Somewhat Likely	Neutral	Somewhat Unlikely	Not at all Likely
CCC Students	40%	48%	10%	2%	1%

	Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Unsatisfied	Not at all Satisfied
CCC Students	36%	53%	11%	0%	1%

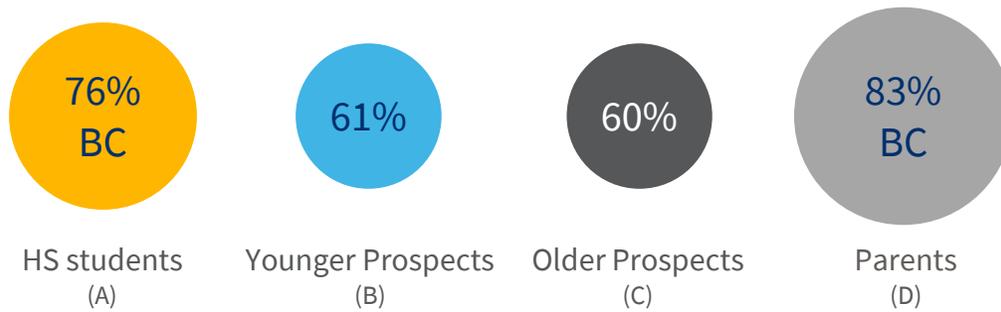


Q.25: How is your overall experience at your California community college?
 Q.26: How likely are you to recommend your California community college to family or friends?
 Q.24: What is your level of satisfaction with your sense of belonging in your California community college

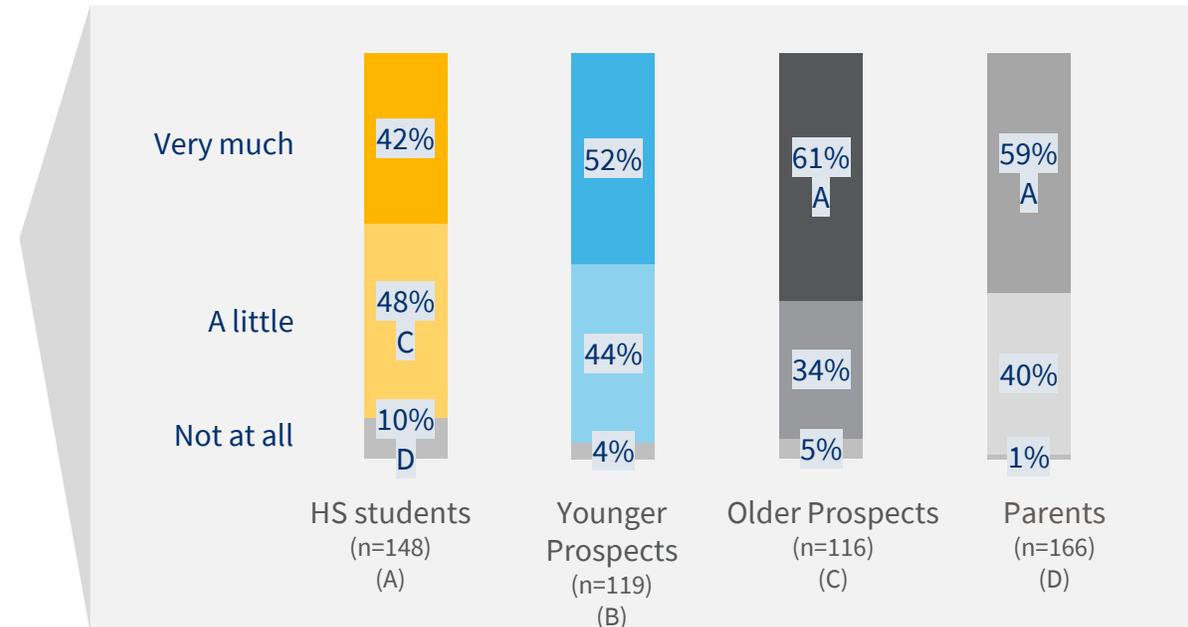
The majority of respondents know someone who has attended a community college; knowing someone has the most influence on Older Prospects and Parents



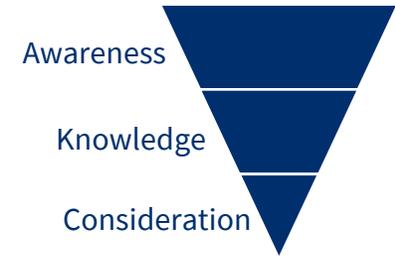
Know Someone who Attended a community college



Influence on Decision to Attend

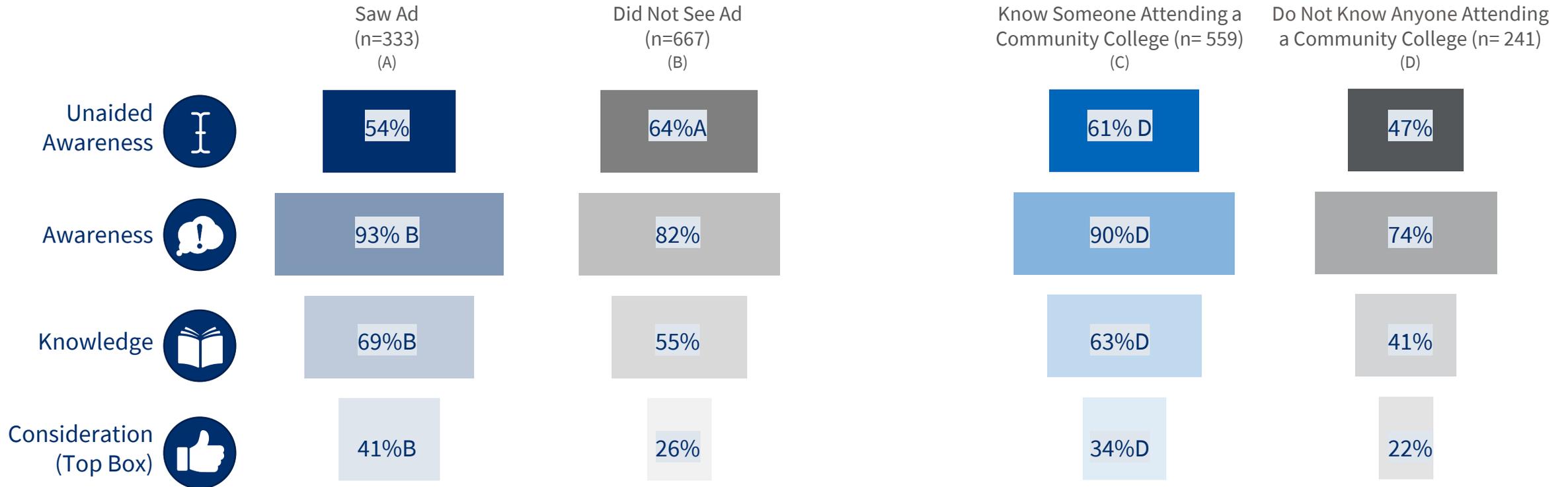


Both advertising and word-of-mouth have an impact on consideration



Impact of Advertising

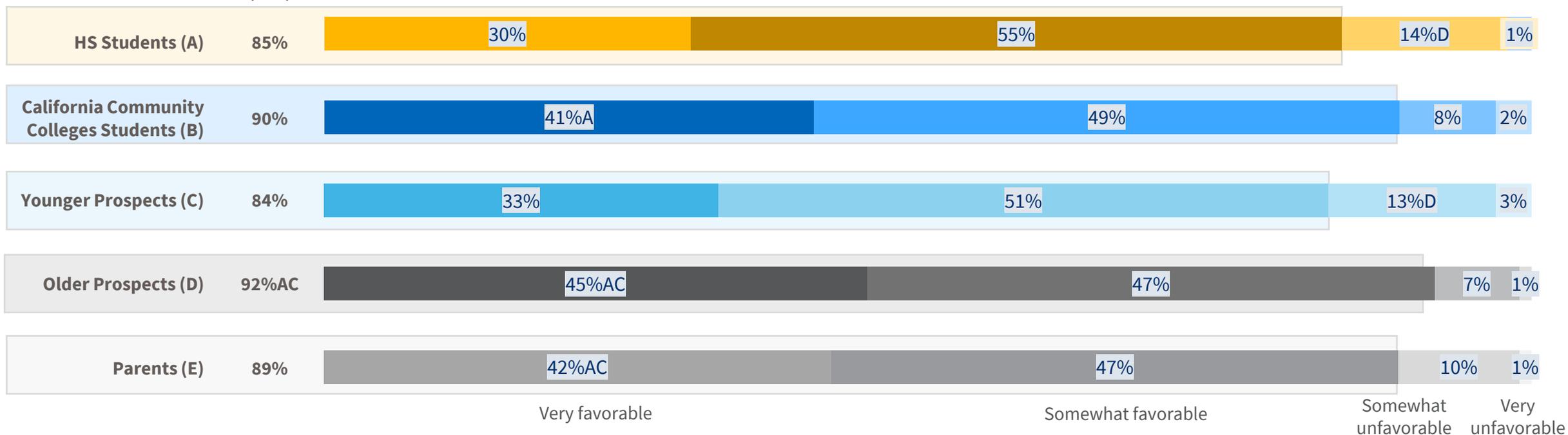
Impact of Word-of-Mouth



California Community Colleges' favorability is high across the board

Quality of Education at California Community Colleges
All Groups

Favorable
(T2B)



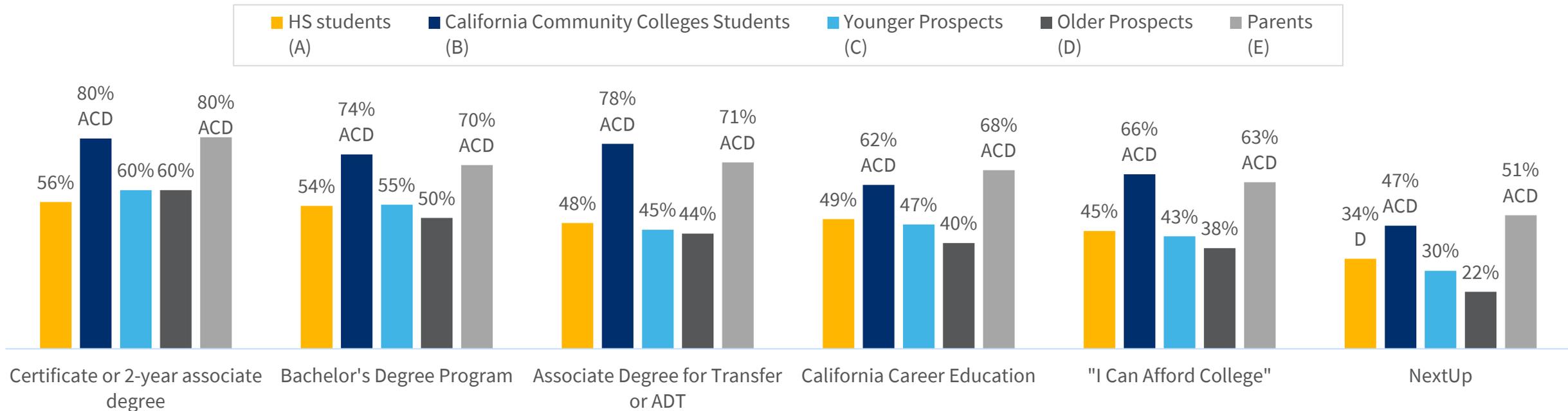
Quality of Education at California Community Colleges All Groups

	Very favorable	Somewhat favorable	Somewhat unfavorable	Very unfavorable
HS students (A)	31%	55%	14%	2%
CCC Students (B)	41%	49%	8%	3%
Younger Prospects (C)	33%	51%	14%	3%
Older Prospects (D)	45%	47%	7%	1%
Parents (E)	42%	47%	10%	1%

Brand Deep Dive

Awareness of specific programs is highest among California Community Colleges Students and Parents

Familiarity with Programs
All Groups

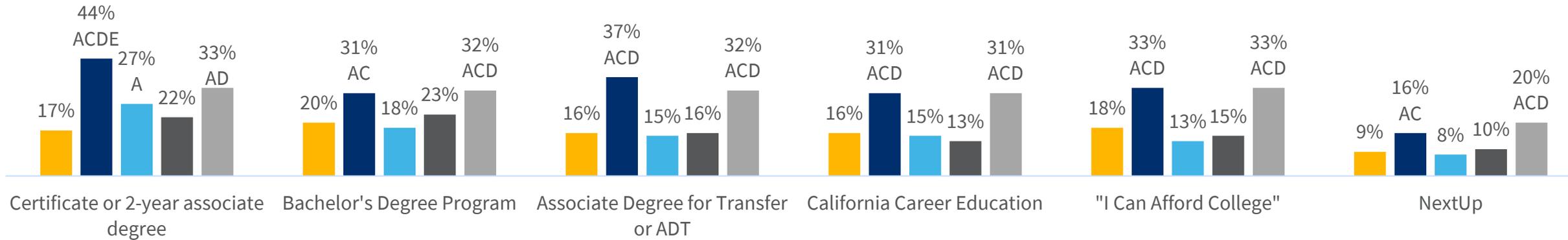
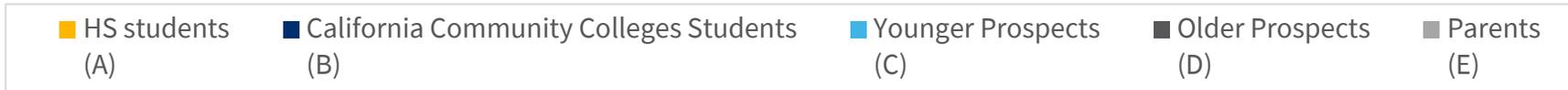


Familiarity with Programs All Groups

	HS students (A)	California Community Colleges Students (B)	Younger Prospects (C)	Older Prospects (D)	Parents (E)
Certificate or 2-year associate degree	56%	80%	60%	60%	80%
Bachelor's Degree Program	54%	74%	55%	50%	70%
Associate Degree for Transfer or ADT	48%	78%	45%	44%	71%
California Career Education	49%	62%	47%	40%	68%
"I Can Afford College"	45%	66%	43%	38%	63%
NextUp	34%	47%	30%	22%	51%

Knowledge about the programs is highest among California Community Colleges Students and Parents; the 2-year degree has the highest knowledge

“Know A Lot” About Programs
All Groups

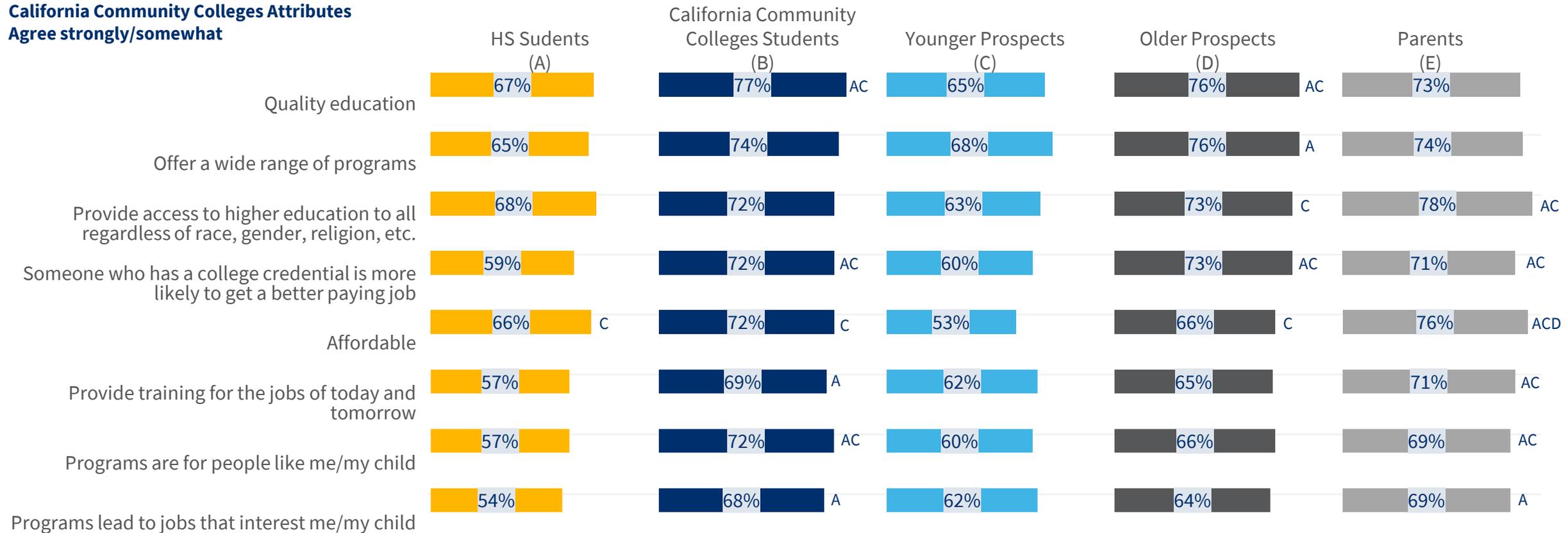


**“Know A Lot” About Programs
All Groups**

	HS students (A)	California Community Colleges Students (B)	Younger Prospects (C)	Older Prospects (D)	Parents (E)
Certificate or 2-year associate degree	17%	44%	27%	22%	33%
Bachelor's Degree Program	20%	31%	18%	23%	32%
Associate Degree for Transfer or ADT	16%	37%	15%	16%	32%
California Career Education	16%	31%	15%	13%	31%
"I Can Afford College"	18%	33%	13%	15%	33%
NextUp	9%	16%	8%	10%	20%

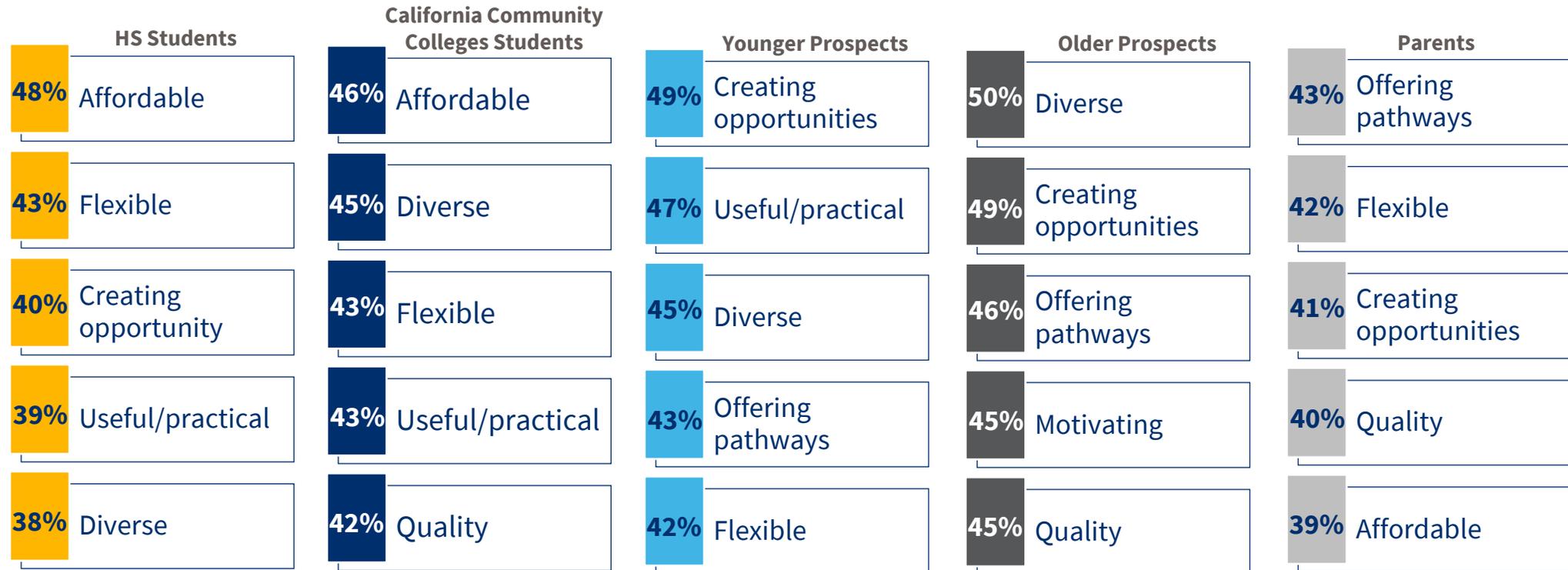
Quality, breadth and equity are the top three attributes but there are differences by groups

California Community Colleges Attributes Agree strongly/somewhat



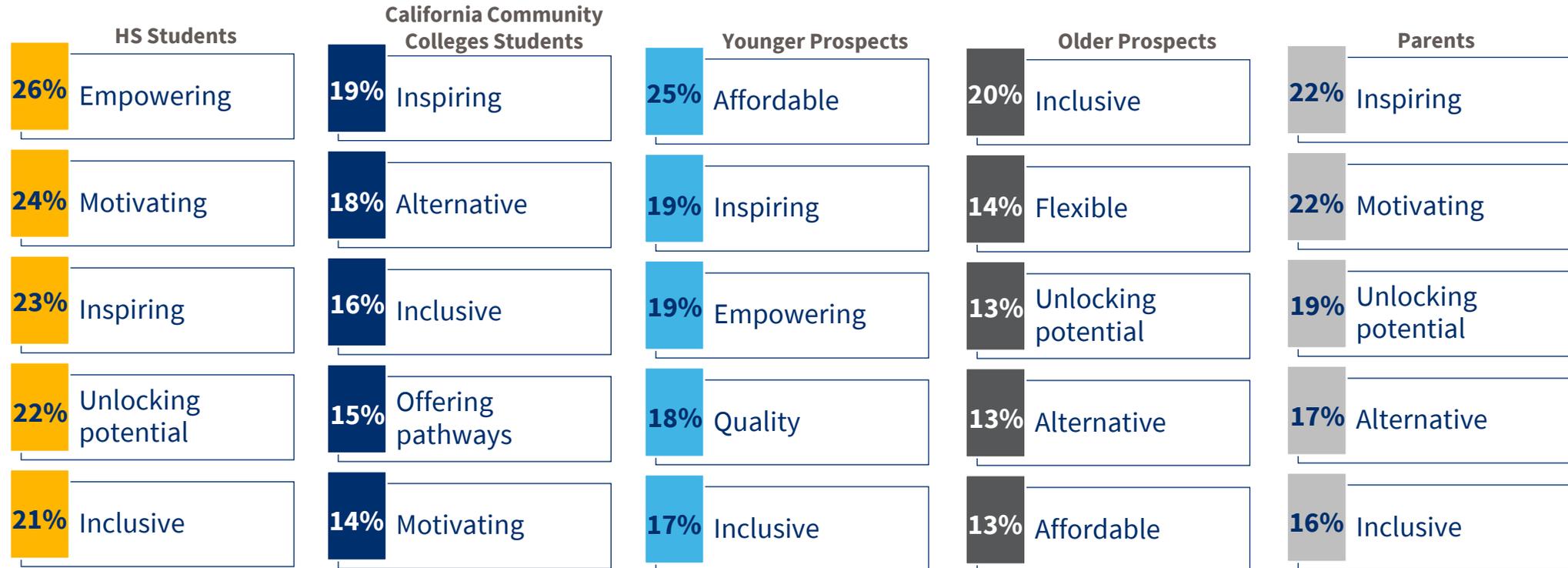
Top 5 words that describe California Community Colleges “Very Well” are different for each group

Describe California Community Colleges: Very Well
All Groups

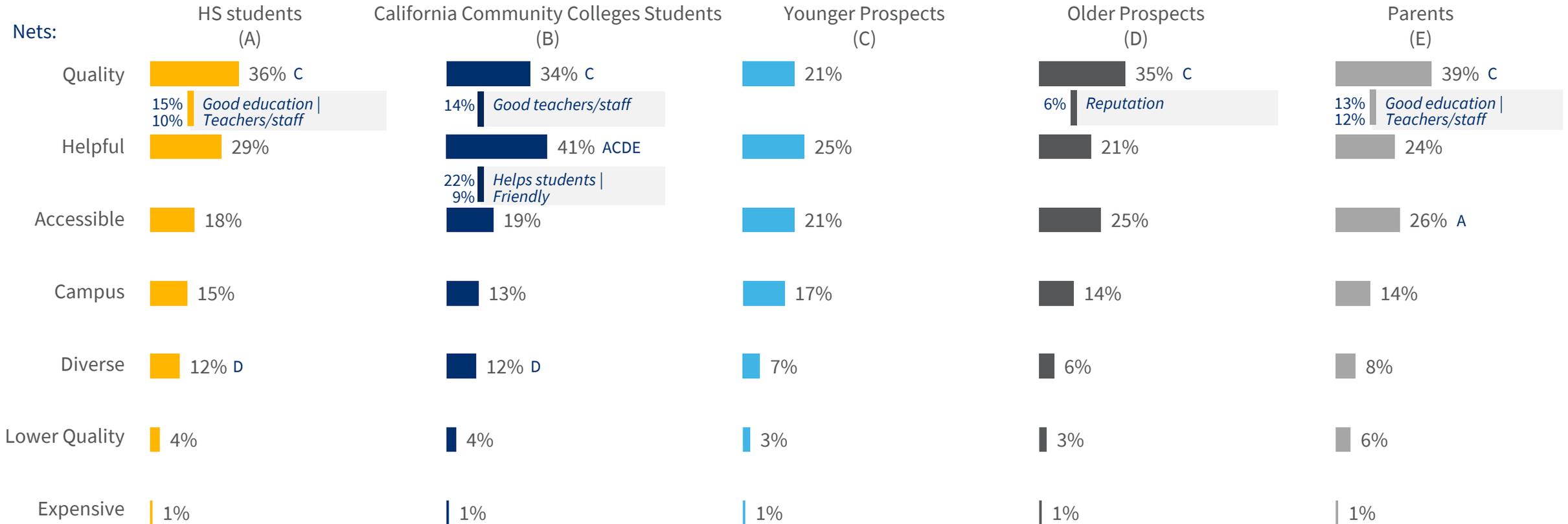


Top 5 words that least describe California Community Colleges “Well” are different for each group but also overlap with the top 5

Describe California Community Colleges: Not Very/Not at All Well
All Groups



Quality and being helpful are most used to describe a local community college



Quality and being helpful are most used to describe a local community college

	HS Students
Quality (NET)	36%
Quality (NET)	
Good Education	15%
Quality (NET)	
Teachers/staff	10%
Helpful (NET)	29%
Accessible	18%
Campus	15%
Diverse	12%
Lower Quality	4%
Expensive	1%

	CCC Students (B)
Quality (NET)	34%
Quality (NET)	
Good teachers/staff	14%
Helpful (NET)	41%
Helpful (NET)	
Helps Students	22%
Helpful (NET)	
Friendly	9%
Accessible	19%
Campus	13%
Diverse	12%
Lower Quality	4%
Expensive	1%

	Younger Prospects (C)
Quality (NET)	21%
Helpful (NET)	25%
Accessible	21%
Campus	17%
Diverse	7%
Lower Quality	3%
Expensive	1%

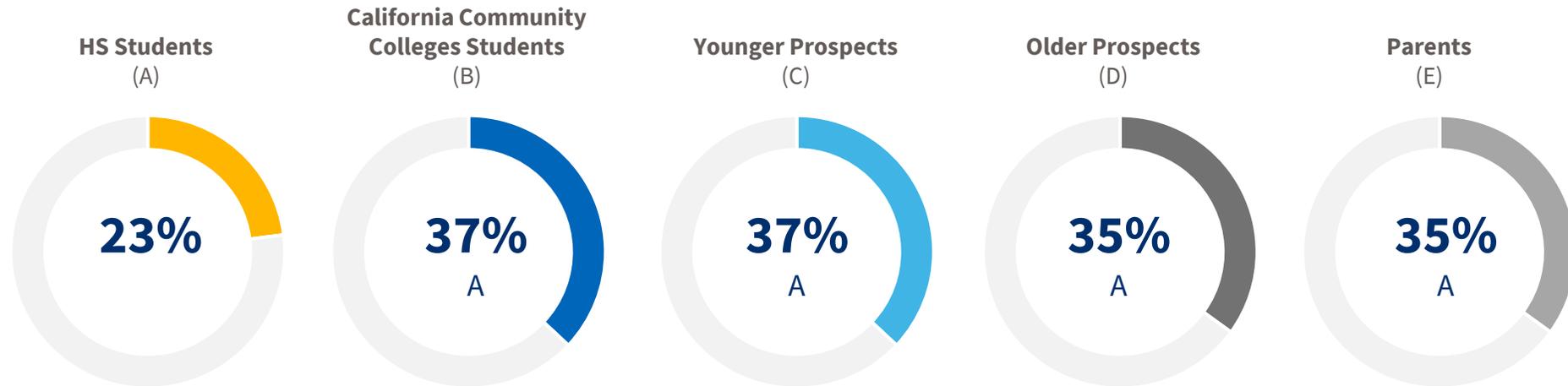
	Older Prospects (D)
Quality (NET)	35%
Quality (NET)	
Reputation	6%
Helpful (NET)	21%
Accessible	25%
Campus	14%
Diverse	6%
Lower Quality	3%
Expensive	1%

	Parents
Quality (NET)	39%
Quality (NET)	
Good Education	13%
Quality (NET)	
Teachers/staff	12%
Helpful (NET)	24%
Accessible	26%
Campus	14%
Diverse	8%
Lower Quality	6%
Expensive	1%

Advertising and Information

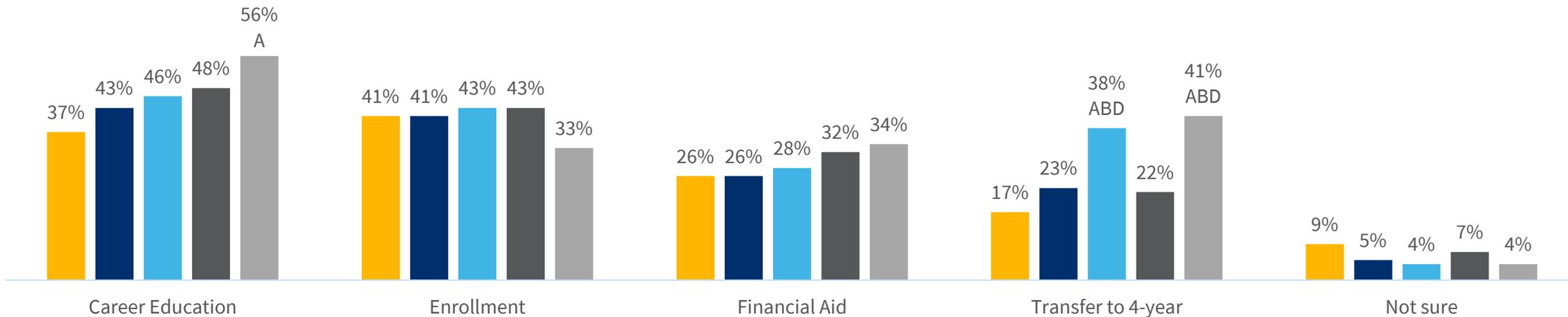
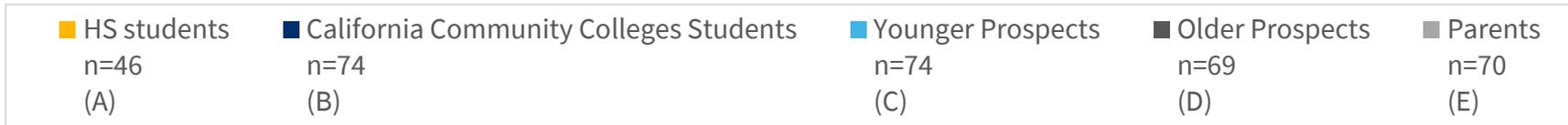
HS Students have the lowest advertising recall

Recall of Advertising All Groups



More Parents and Prospects 18-29 recall an ad about Career Education on an aided basis

Recall Ad Topic
All Groups



**Recall Ad Topic
All Groups**

	HS students n=46 (A)	California Community Colleges Students n=74 (B)	Younger Prospects n=74 (C)	Older Prospects n=69 (D)	Parents n=70 (E)
Career Education	37%	43%	46%	48%	56%
Enrollment	41%	41%	43%	43%	33%
Financial Aid	26%	26%	28%	32%	34%
Transfer to 4-year	17%	23%	38%	22%	41%
Not sure	9%	5%	4%	7%	4%

Unaided memory of ad

“

A detailed introduction to the course and a description of enrollment.”

“

It was describing that you could go to a college near your home.”

“

I keep seeing ads on buses for community colleges. Basically saying enroll!!!.”

“

I remember an ad about getting help with money to go to a community college.”

- CALIFORNIA COMMUNITY COLLEGES STUDENT

“

Different races with happy faces graduating and getting a nice career.”

- PROSPECT 30-54

“

I remember it showing the many opportunities that may come when attending this college.”

- CALIFORNIA COMMUNITY COLLEGES STUDENT

“

A college advertising an affordable education degree and a good experience.”

- PROSPECT 18-29

“

Information about enrollment.”

- PROSPECT 30-54

“

Something about community college being an affordable option for those who might not otherwise go to college.”

- PARENT

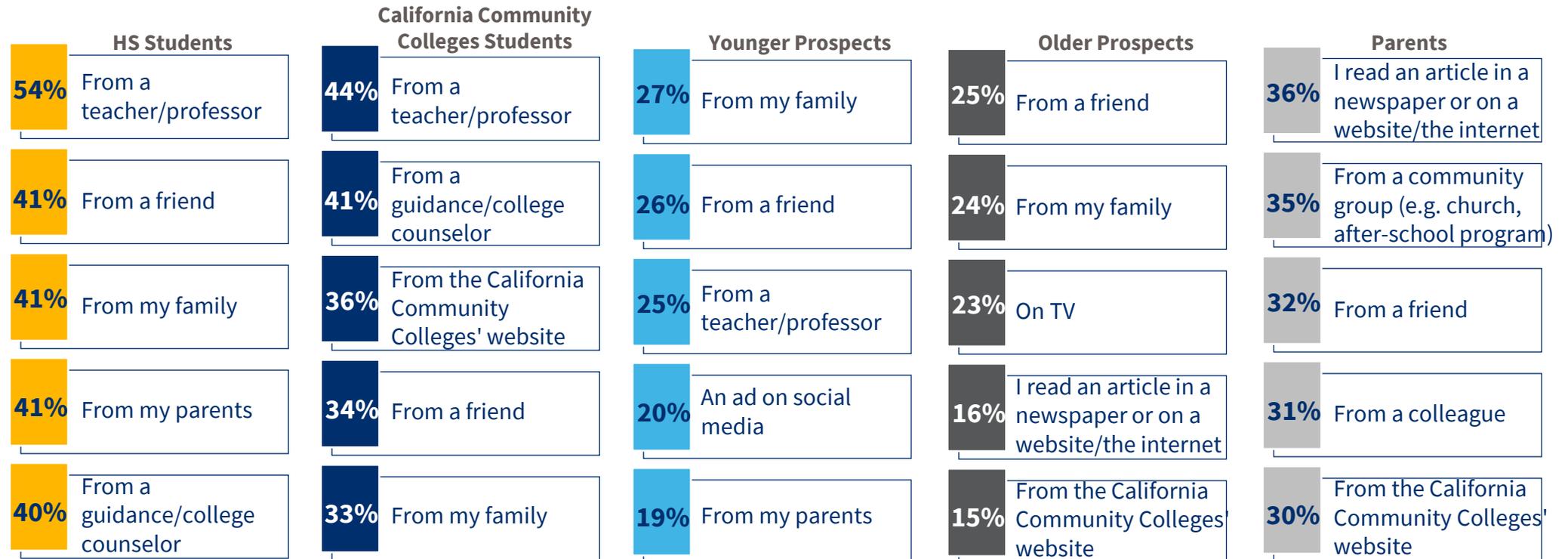
“

The ad I saw was mentioning the steps for enrolment at California community college.”

- H S STUDENT

Students have heard about California Community Colleges from a teacher/counselor while Prospects have heard from family/friends

Top 5 Heard about California Community Colleges from...
All Groups



Groups have different go-to's to learn about California Community Colleges, but the internet is the primary source

Top 5 Knowledge Sources...
All Groups



Emails and websites are preferred for receiving college information

		HS Students (A)	California Community Colleges Students (B)	Younger Prospects (C)	Older Prospects (D)	Parents (E)
Emails		65%C	63%	54%	59%	61%
Websites		41%	48%	47%	54%A	55%A
College social media pages		40%D	41%D	34%	26%	40%D
Text messages		39%	34%	33%	30%	38%
Brochures		32%C	36%C	19%	31%C	42%ACD
Newsletters		20%	24%C	16%	22%	41%ABCD

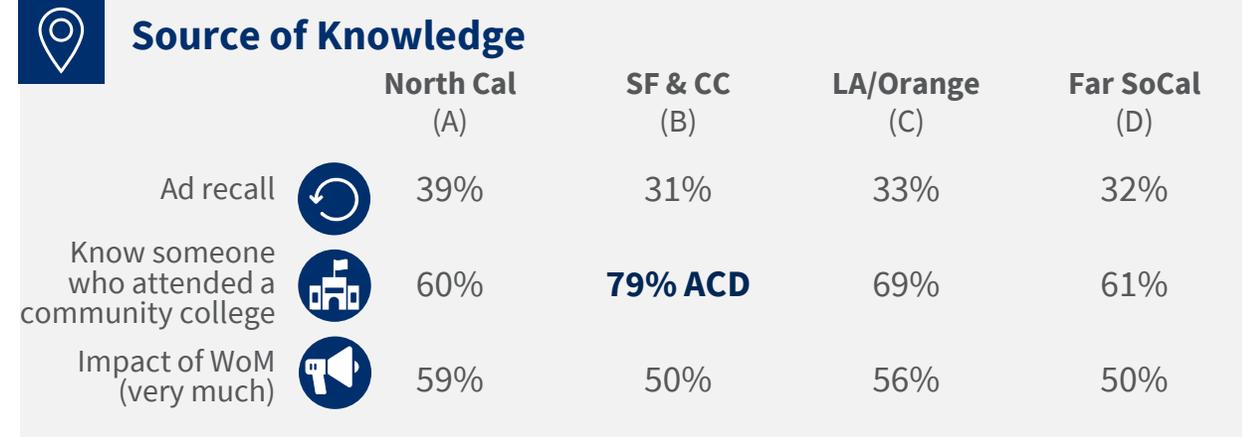
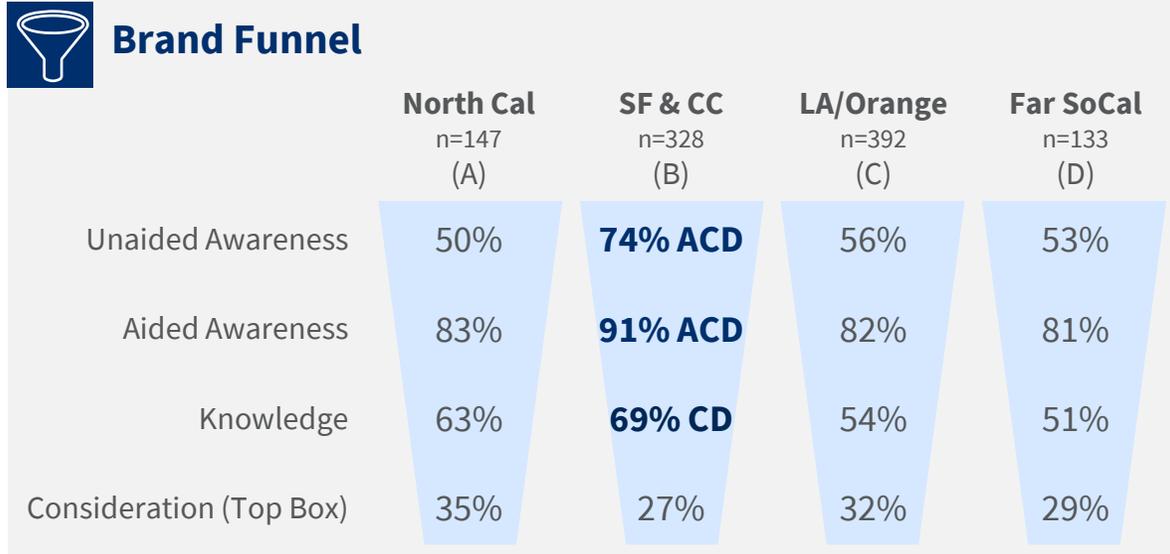
Different groups use different media

	HS Students	California Community Colleges Students	Younger Prospects	Older Prospects	Parents
	(A)	(B)	(C)	(D)	(E)
YouTube	77% E	70% E	75% E	72% E	50%
Instagram	68% CDE	61% DE	58% DE	45% E	28%
Streaming services (Netflix, Hulu, Disney+, etc.)	61% CDE	57% C	44%	50%	47%
Television	34%	39%	42%	53% ABC	64% ABCD
Facebook	34%	36%	44%	58% ABCE	39%
Spotify	48% CDE	55% CDE	34% E	26%	20%
TikTok	49% DE	40% DE	48% DE	20%	20%
Snapchat	56% BCDE	42% DE	43% DE	18%	17%
Twitter	19%	36% AD	33% AD	24%	29% A
Radio	9%	14%	25% AB	40% ABCE	28% AB
Newspapers (online or print)	11%	12%	13%	21% ABC	47% ABCD
Magazines	15%	16%	11%	17%	44% ABCD
Pandora	15%	22%	23% A	21%	18%
Podcasts	19%	22% C	14%	19%	19%
LinkedIn	5%	19% AC	7%	12% A	36% ABCD
Radio apps/Streaming radio	5%	9%	7%	11% A	18% ABCD

Focus On—Look at Sub-Groups

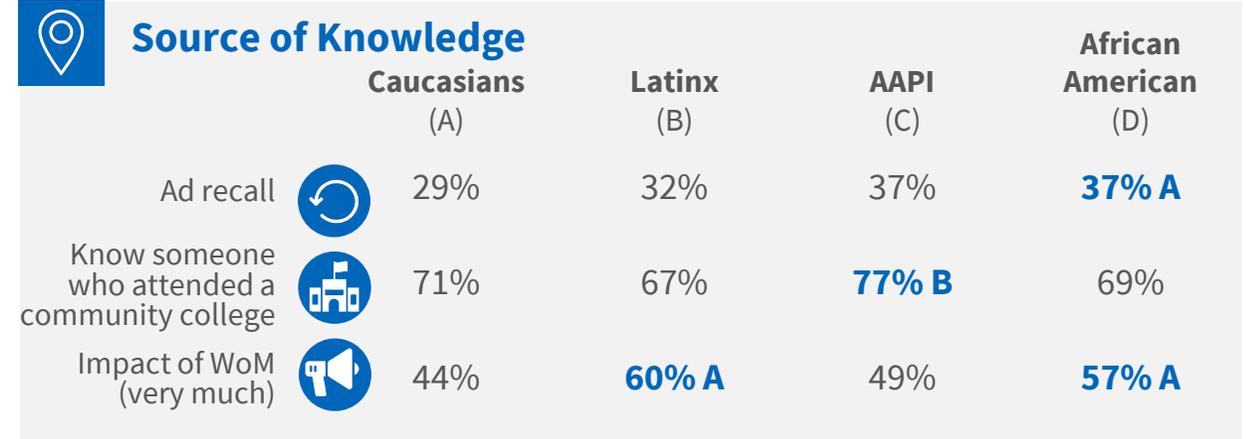
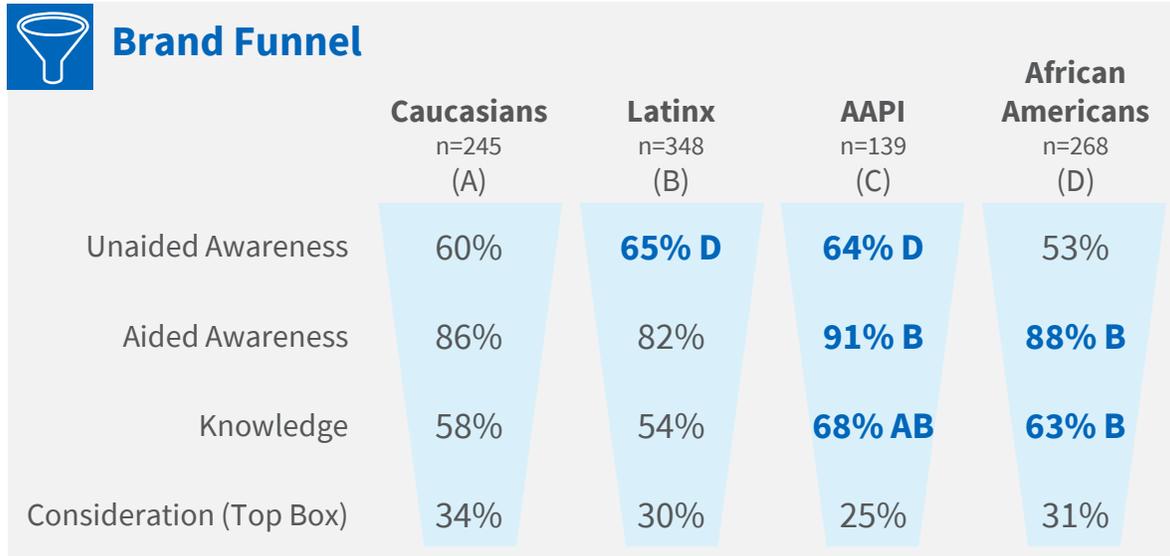


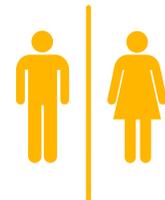
Region scorecard



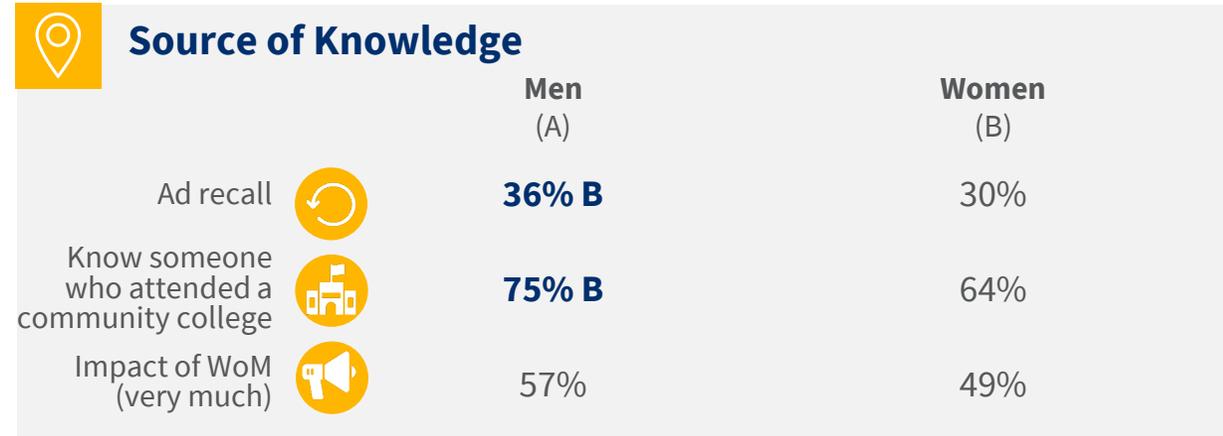
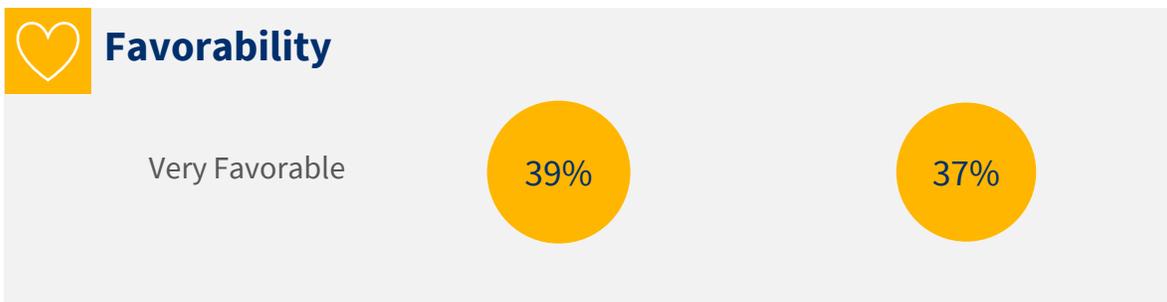
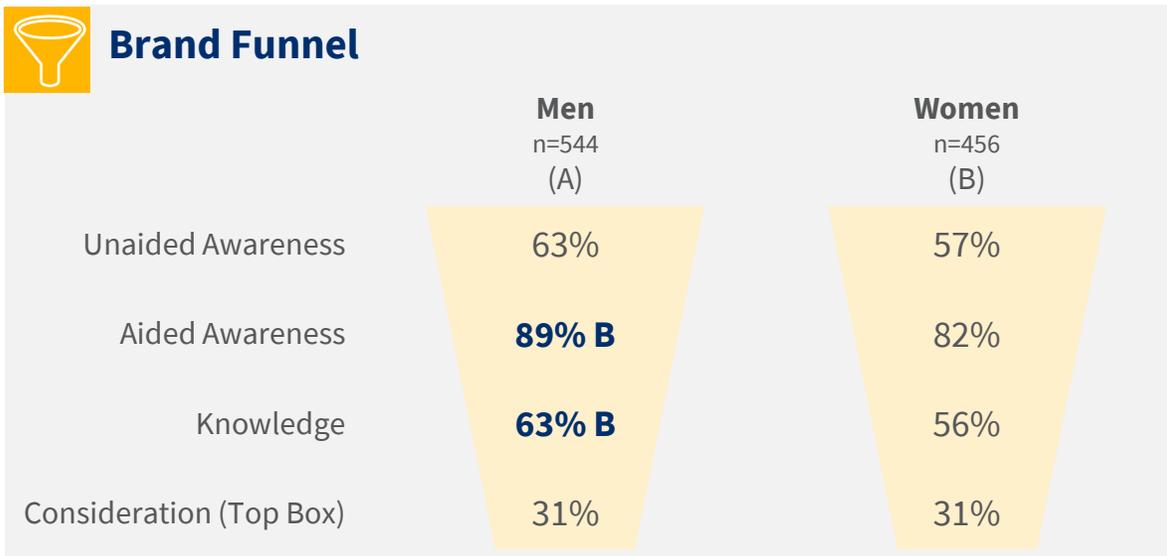


Race/Ethnicity scorecard



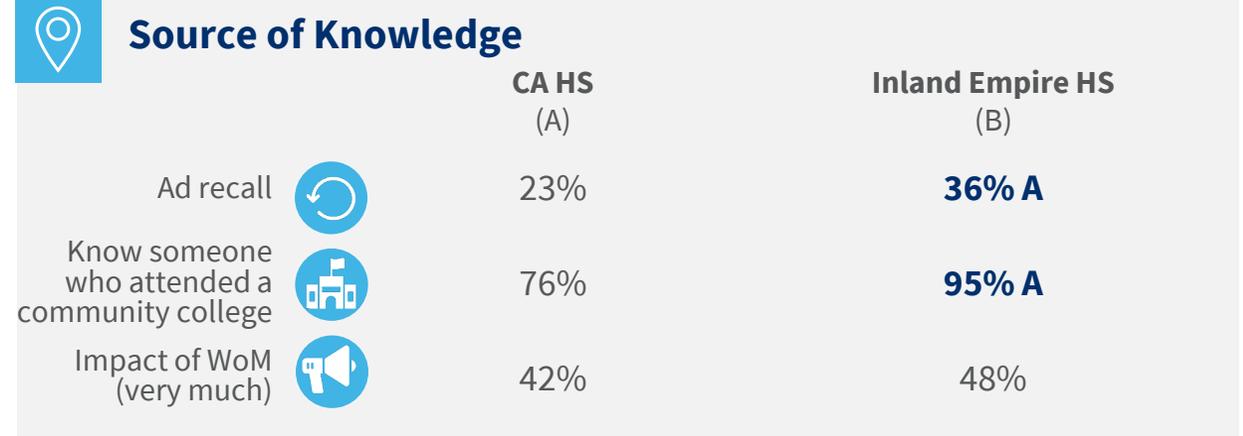
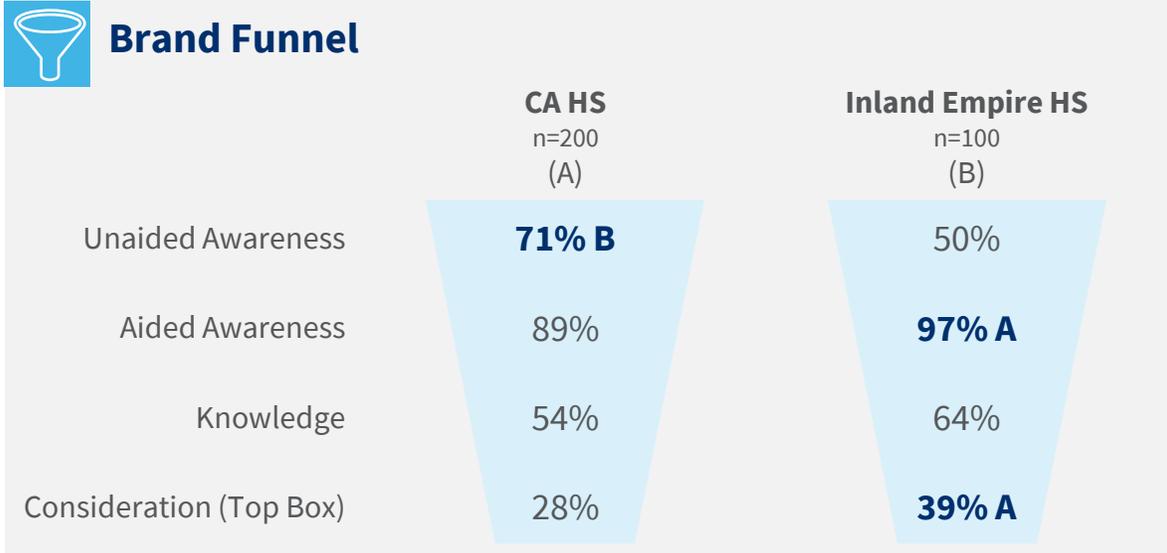


Gender scorecard





CA vs Inland Empire HS scorecard

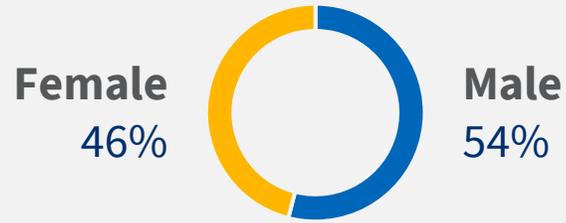


Demographics

Demographics (Main)



Gender



Employment

Employed	37%
Unemployed	12%
Student	41%
Full-time parent	7%



Region



Ethnicity

Hispanic/Latino/Latinx	35%
African-American/Black	27%
Caucasian/White	22%
Asian or Pacific Islander	14%
American Indian or Alaskan Native	3%



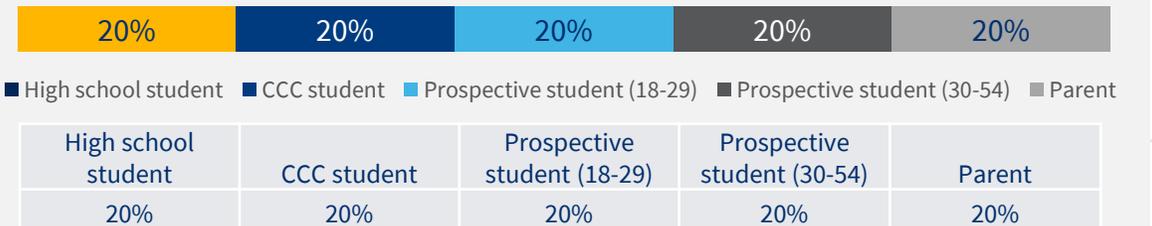
HHI*

Mean
\$38.3K

Median
\$42.5K



Target Groups



*Asked of Prospects and Parents

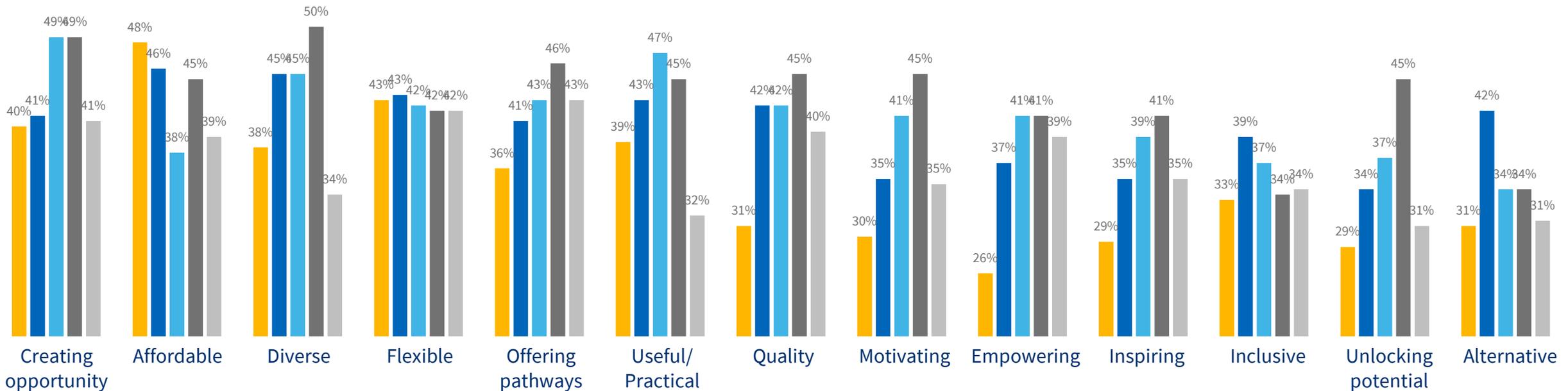
Quota Matrix (Main)

Regions	TOTAL N=1000		Far Northern California and Central Valley (REGIONS 1,2,5) 147		San Francisco Bay Area and Central Coast (REGIONS 3,4,6) 328		Los Angeles and Orange Counties (REGIONS 7,8) 392		Far Southern California (REGIONS 9,10) 133	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
	African Americans	130	138	21	18	47	51	47	51	15
HS students	27	23	5	4	10	9	8	8	4	2
California Community Colleges students	23	30	4	4	9	10	7	11	3	5
Prospects 18-29	25	31	4	3	9	12	9	12	3	4
Prospects 30-54	23	26	3	4	7	10	10	8	3	4
Parents	32	28	5	3	12	10	13	12	2	3
Latinx	183	165	22	23	59	53	79	70	23	19
HS students	36	34	3	4	14	11	14	14	5	5
California Community Colleges students	41	38	6	5	12	12	17	17	6	4
Prospects 18-29	36	34	5	4	10	12	16	14	5	4
Prospects 30-54	35	30	5	5	8	7	17	14	5	4
Parents	35	29	3	5	15	11	15	11	2	2
AAPI	81	58	10	9	31	15	28	26	12	8
HS students	20	12	1	2	8	4	8	5	3	1
California Community Colleges students	17	10	3	1	7	3	4	5	3	1
Prospects 18-29	13	13	2	2	6	3	3	6	2	2
Prospects 30-54	13	11	2	2	3	1	6	6	2	2
Parents	18	12	2	2	7	4	7	4	2	2
Caucasians/ American Indians	150	95	23	21	49	23	57	34	21	17
HS students	32	16	2	3	13	8	11	4	6	1
California Community Colleges students	31	10	6	2	12	5	12	2	1	1
Prospects 18-29	23	25	7	5	5	4	5	10	6	6
Prospects 30-54	36	26	7	6	8	3	14	11	7	6
Parents	28	18	1	5	11	3	15	7	1	3

Appendix

Words that describe California Community Colleges “Very Well”

Describe California Community Colleges: Very Well
All Groups



Describe California Community Colleges: Very Well All Groups

	HS Students	CCC Students	Younger Prospects	Older Prospects	Parents
Creating opportunity	40%	41%	49%	49%	41%
Affordable	48%	46%	38%	45%	39%
Diverse	38%	45%	45%	50%	34%
Flexible	43%	43%	42%	42%	42%
Offering pathways	36%	41%	43%	46%	43%
Useful/Practical	39%	43%	47%	45%	32%
Quality	31%	42%	42%	45%	40%
Motivating	30%	35%	41%	45%	35%
Empowering	26%	37%	41%	41%	39%
Inspiring	29%	35%	39%	41%	35%
Inclusive	33%	39%	37%	34%	34%
Unlocking potential	29%	34%	37%	45%	31%
Alternative	31%	42%	34%	34%	31%