

California Community Colleges

Enrollment Study

November 2021



Contents

- Background, Objectives, & Methodology
- Highlights & Opportunities
- Brand Awareness and Favorability
- Motivators and Detractors
- In-person vs. Online Classes
- Information Sources
- Focus on Specific Groups
- Demographics

Background, Objectives & Methodology

Background and Objectives

The COVID-19 pandemic has impacted education across the state of California, with most community college classes moving online. During the past 18 months of the pandemic, the California Community Colleges experienced declines in enrollment and retention. These declines particularly impacted Latino and African American men.

With this backdrop of the pandemic, the objectives of this research are to...

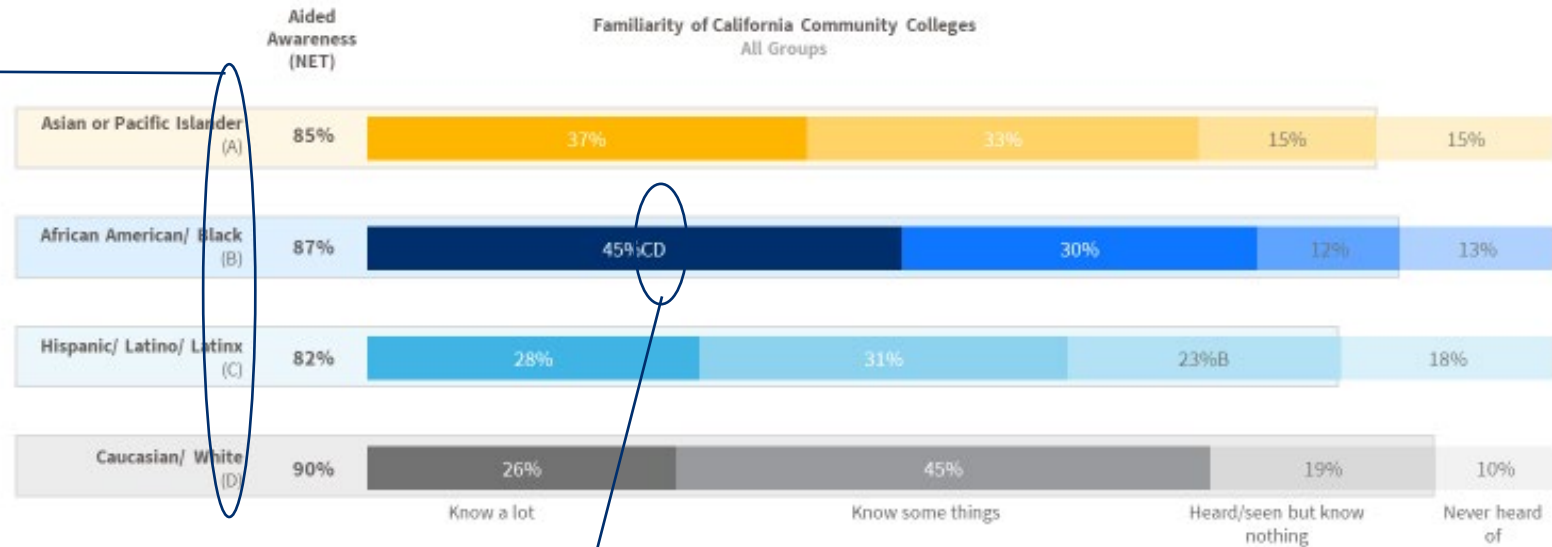
- Uncover the **barriers and motivations** to enroll in a community college for prospective students from diverse, multicultural groups, including motivations for first-time enrollment among high school students.
- Help identify the key **messages** that resonate with these diverse audiences to increase consideration, motivation and enrollment.
- Identify the primary **information and media sources** to reach these diverse audiences.
- Understand if **brand** awareness and favorability are barriers for these students

Methodology

- The study was conducted online.
- There were 400 completed surveys among:
 - AAPI 100
 - African Americans 100
 - Latinx 100
 - White/Caucasians 100
- Quota groups were set for each population, and targeted efforts were made to include a variety of prospects (High School students, Prospects aged 18-24, 25-34 and 35-54), genders, and geographies. Household income for prospects was under \$75,000. See Appendix for detail.
- Among these 400 online surveys, 50 were completed in the San Bernardino/Riverside/Imperial counties.

Note on Reading this Report

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



A/B/C/D/E letters indicate a number is statistically significantly higher than other group(s) referenced at 95% confidence
For example: 45%^{CD} means that significantly more AA than both Latinx and Whites 'Know a lot' about California Community Colleges.

Highlights & Opportunities

Highlights

BRAND



Brand awareness and favorability are very high among all racial/ethnic groups in the study. African Americans have higher knowledge and higher favorability towards the California Community Colleges than both Latinx and Caucasians.

MESSAGES



Messages that address flexibility, financial aid, and training for new skills/career resonate the most.

- “I can create a flexible education plan that works for me and my family.”
- “California community colleges provide a variety of financial aid support to help cover tuition, books, supplies and other education related expenses.”
- “California community colleges provide the opportunity to retrain for a new career or learn new skills so I can advance in my current career.”

MOTIVATORS AND BARRIERS



Affordability, better quality of life and convenience are the top reasons to consider enrolling in a California community college. Many prospects mention needing to work as a top reason for not enrolling, followed by costs and COVID-19. Cost is the top mention on an unaided basis.

INFORMATION AND MEDIA



College websites, web searches and Social Media are the preferred ways for getting college information. The top Social Media platforms to get this information are YouTube, Facebook and Instagram.

Opportunities



Brand Building: California Community Colleges has a high aided awareness and high favorability among your target audience. Continue to build on this strong foundation to attract new students.



Motivations to Attract New Students: In order to increase enrollment, continue to use targeted marketing to emphasize the attributes your brand stands for: equity, breadth, flexibility and quality. Cost is also a very important barrier for many and financial aid should be mentioned.



Messages: The pandemic has had a negative financial impact on many Californians and cost is top of mind among your prospects. Messaging around financial aid, about the flexibility that California Community Colleges offers will resonate with all racial/ethnic groups. Some specific racial/ethnic group communications can also help in addition to the broader overall enrollment campaign.

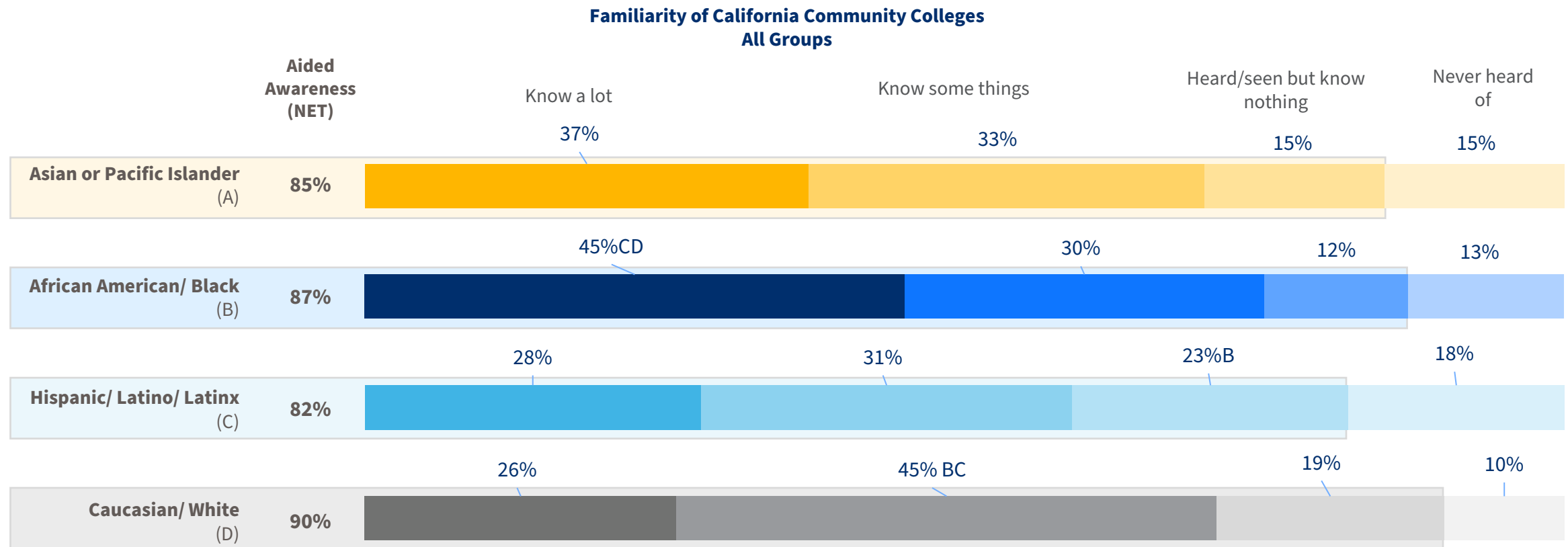


Information and Media: Your target groups have different media consumption behaviors than in the past. Online communications via your website and the use of Social Media is increasingly important to reach your target audience.

Brand Awareness & Favorability

Familiarity of California Community Colleges is very high among all races/ethnicities in the study

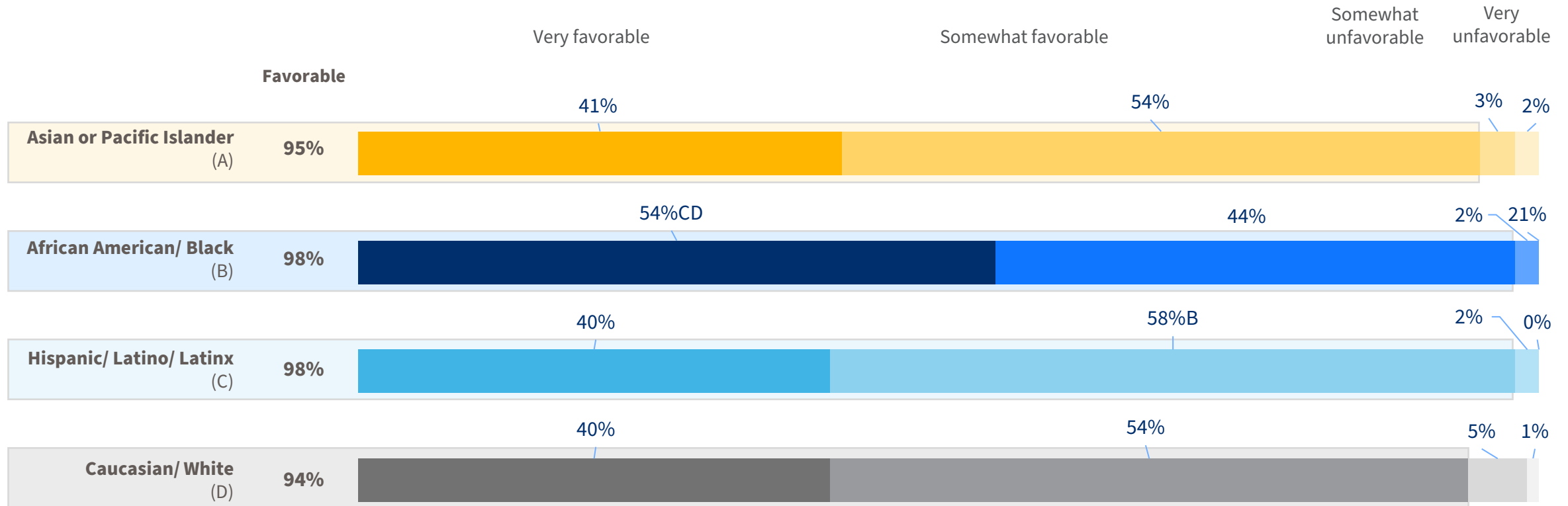
More African Americans have higher knowledge than Latinx or Caucasians



California Community Colleges' favorability is high across the board

More African Americans are 'Very Favorable' than Latinx or Caucasians

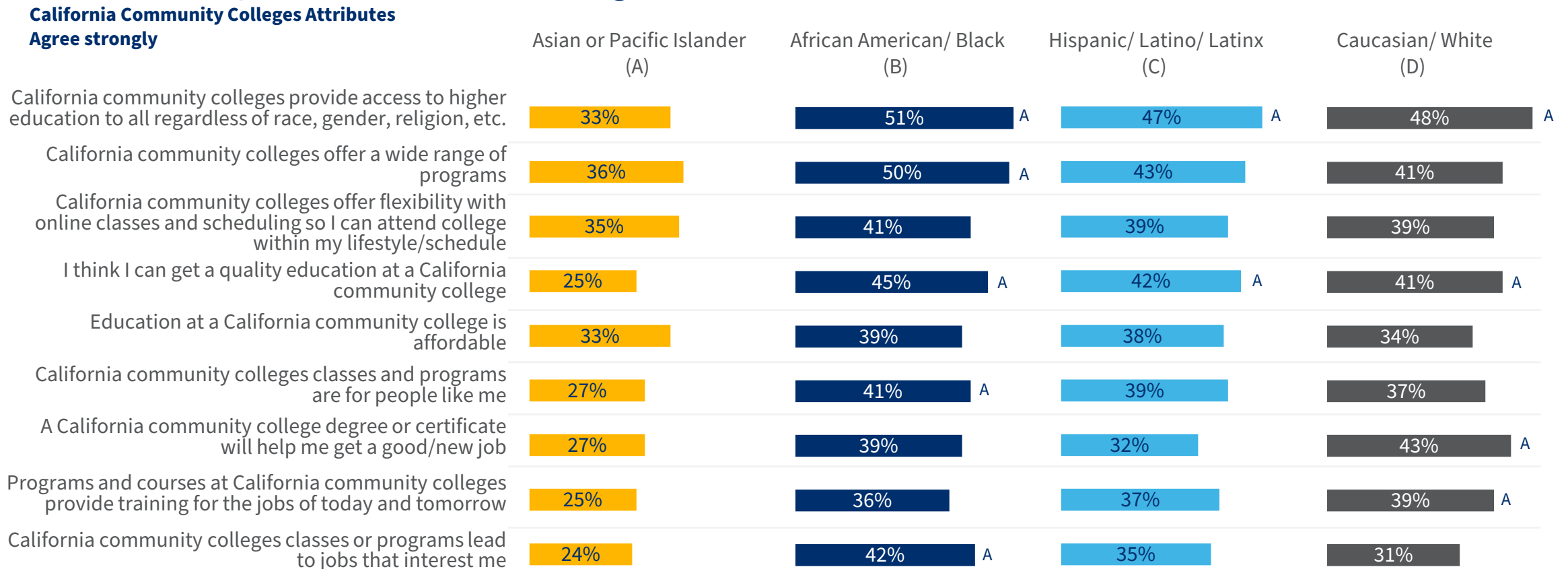
Quality of Education at California Community Colleges
All Groups



Motivators & Detractors

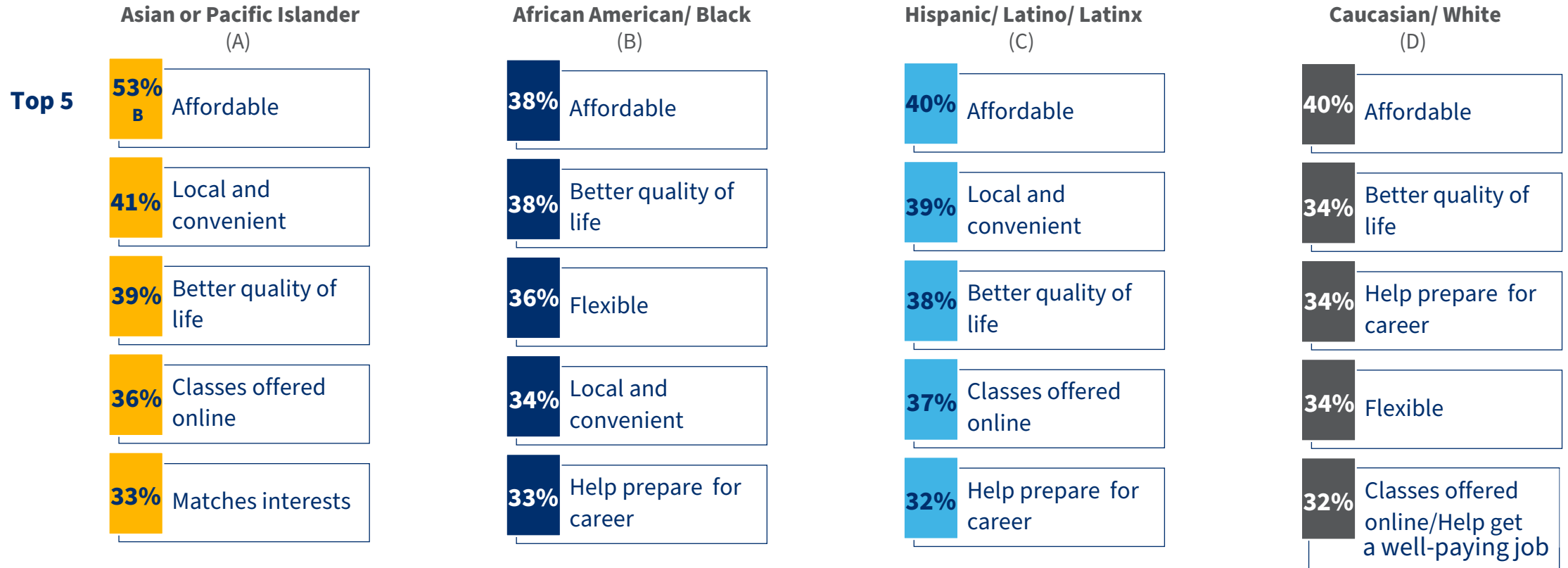
Equity, breadth, flexibility and quality are the top four attributes for California community colleges

AAPI respondents have lower agreement scores on all items



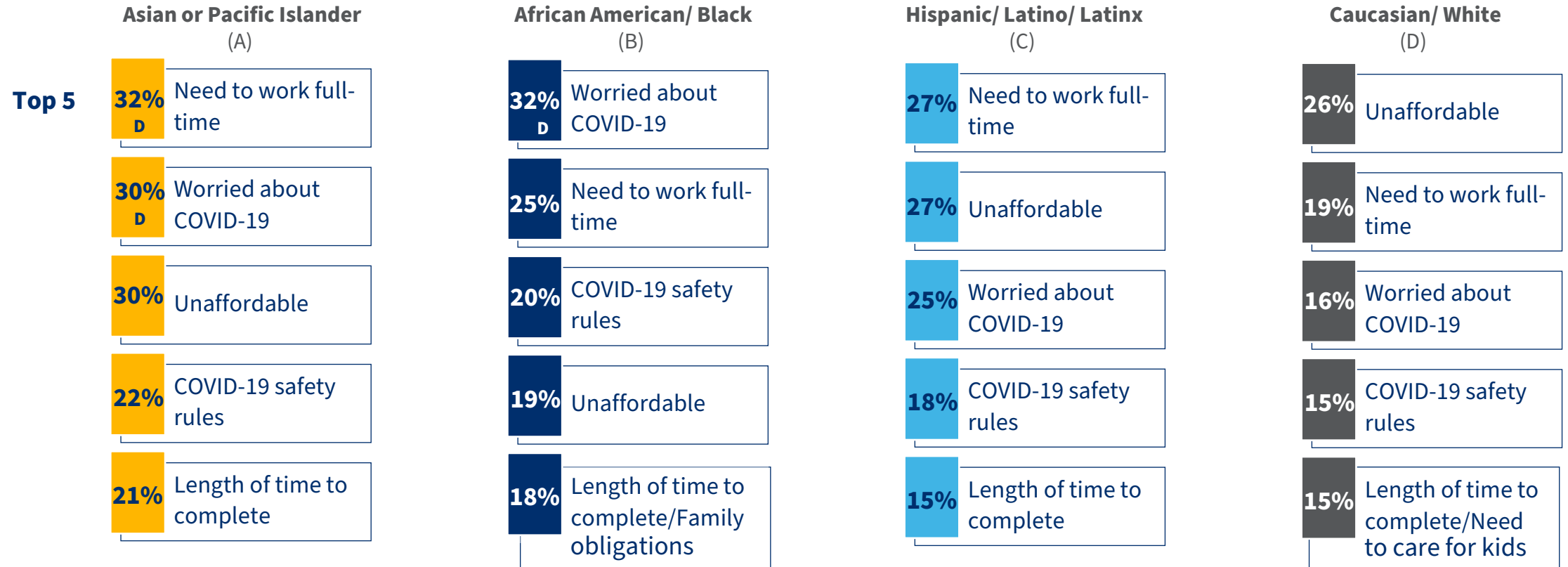
Affordability, better quality of life and convenience are the top reasons to consider a California community college

Reasons to Consider California Community Colleges All Groups



Needing to work, affordability and COVID-19 are the main reasons NOT to consider a California community college

Reasons NOT to Consider California Community Colleges All Groups



In addition to cost, respondents are most concerned about the time needed to get the degree and getting support

African Americans have the most concerns

Concerns Enrolling in California Community Colleges All Groups

| Asian or Pacific Islander (A) | | African American/ Black (B) | | Hispanic/ Latino/ Latinx (C) | | Caucasian/ White (D) | |
|--|-----|--|------------|--|-----|--|-----|
| It is too expensive, I cannot afford it | 27% | I am concerned the class sizes will be too large | 27% D | I don't think I will get the support I need | 22% | It is too expensive, I cannot afford it | 28% |
| It will take too long to get a degree or certificate | 26% | I don't think I will get the support I need | 23% | It will take too long to get a degree or certificate | 21% | It will take too long to get a degree or certificate | 21% |
| I don't think the class schedule will suit me | 25% | It is too expensive, I cannot afford it | 22% | It is too expensive, I cannot afford it | 20% | | |
| I am concerned the class sizes will be too large | 22% | Class/course information is not easily available online and I don't know what to expect from the class | 22% C | I don't think I will fit in | 20% | | |
| | | I am concerned the courses I take will not count towards a 4-year degree/transfer | 21% C | | | | |
| | | Enrollment is too complicated | 21% | | | | |
| | | I don't think the class that I want will be taught in-person | 20% ACD | | | | |

The top mention for motivation to enroll is around costs

“

The one thing they can do is provide incentives to enroll such as money towards education or items that can help with getting through school.”

- PROSPECT 18-24, LATINX

“

If there was some sort of financial aid program to help those in need get education, that would be helpful and encourage me to enroll.”

- PROSPECT 25-34, AAPI

“

They can offer us the scholarship to make us enroll.”

- HS, LATINX

“

Convince me it's an easy enrollment process. Also showing me it's affordable and very convenient.”

- PROSPECT 18-24, AFRICAN AMERICAN

“

It offers low-cost programs which should be communicated to motivate.”

- HS, AFRICAN AMERICAN

“

For recent high school graduates, it can help you get into a 4-year university easier and cheaper.”

- PROSPECT 18-24, LATINX

“

Offering free classes or more financial aid and more classes offered at night.”

- PROSPECT 35-54, CAUCASIAN

“

Have a loan program to cut immediate costs.”

- PROSPECT 35-54, AAPI

“

My education is paid for 100%.”

- PROSPECT 25-34, AFRICAN AMERICAN

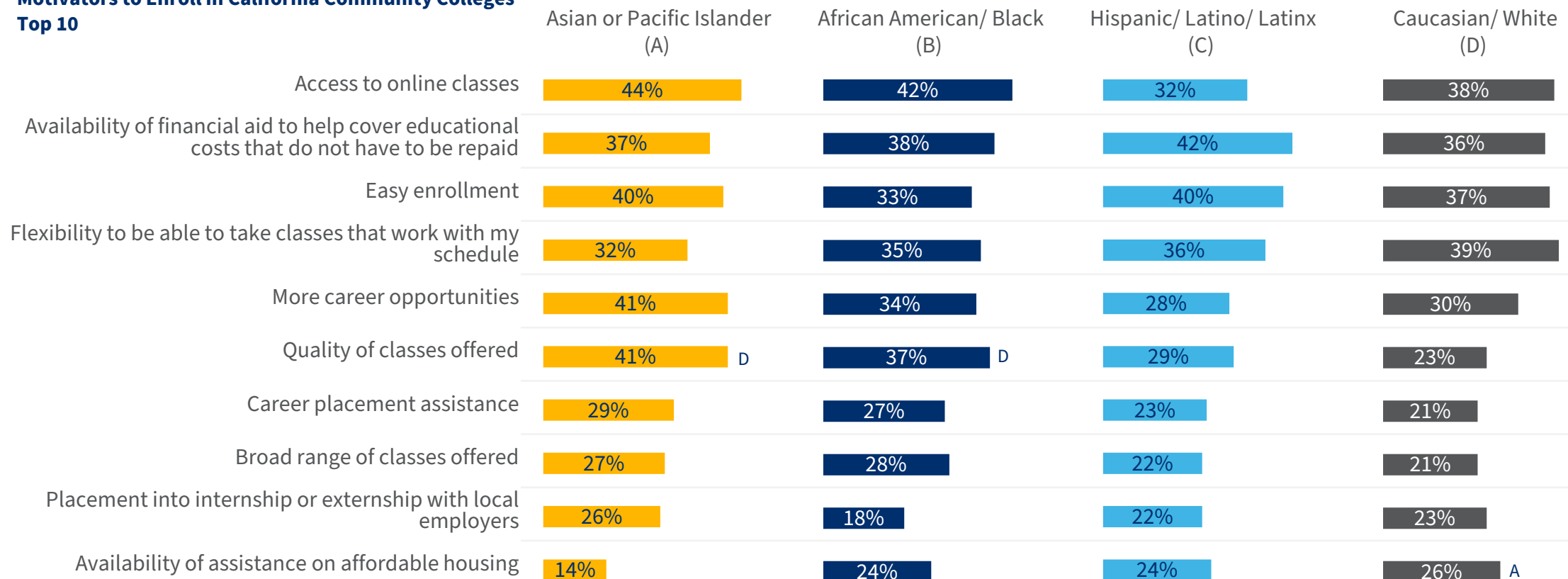
“

They should provide proper information on financial aid so that students are aware that they qualify for it.”

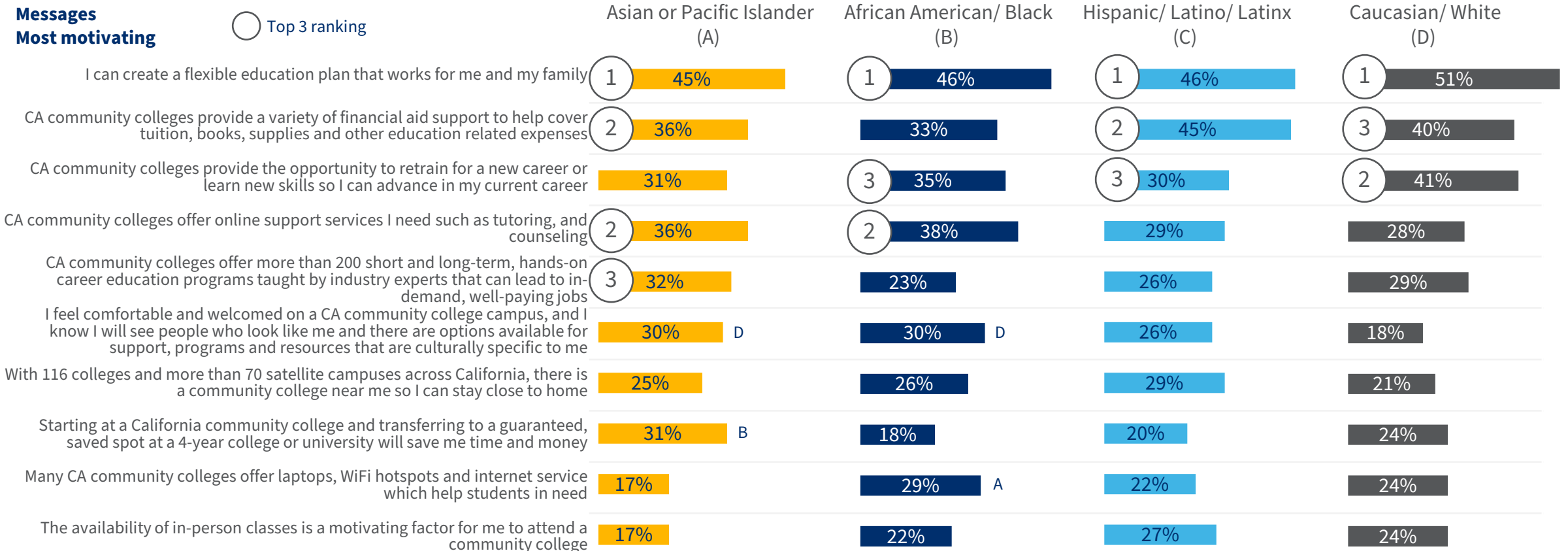
- PROSPECT 25-34, CAUCASIAN

Messages about online classes, financial aid and easy enrollment are motivators to enroll in a California community college

Motivators to Enroll in California Community Colleges Top 10

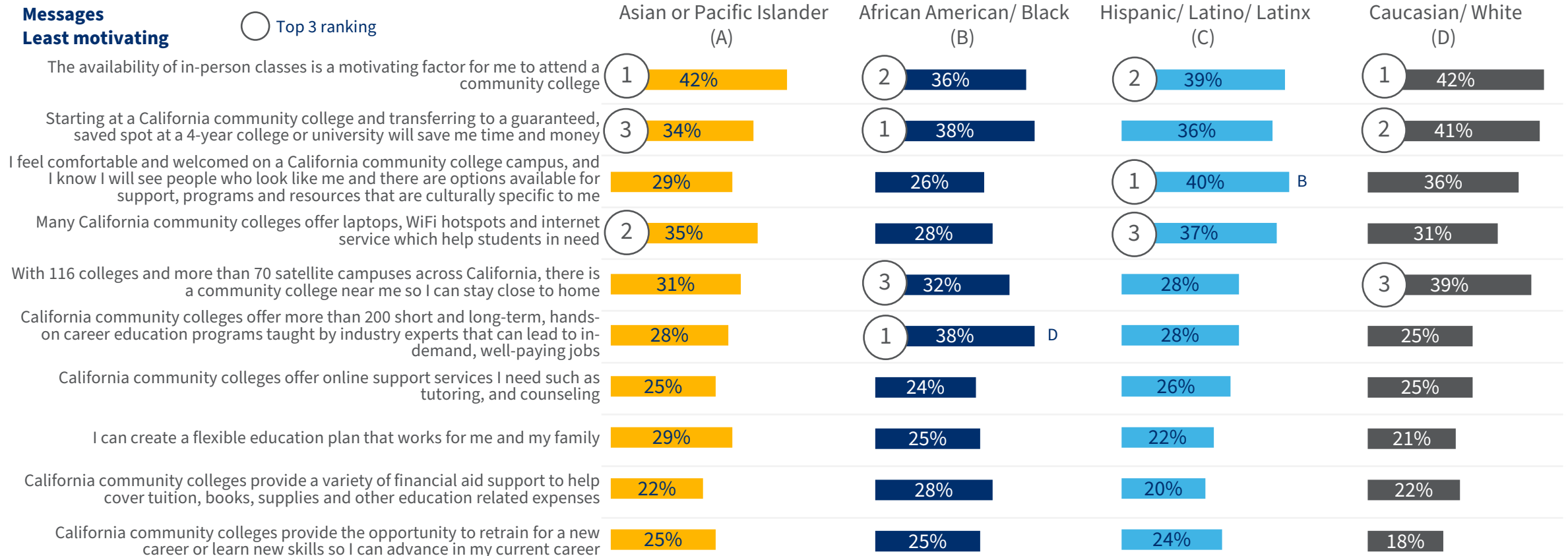


Flexibility, financial aid, new skills and online support are the messages that resonate most with participants



In-person classes, and transfer to 4-year college are the messages that least resonate with participants

Latinx find the ‘cultural fit’ message least motivating

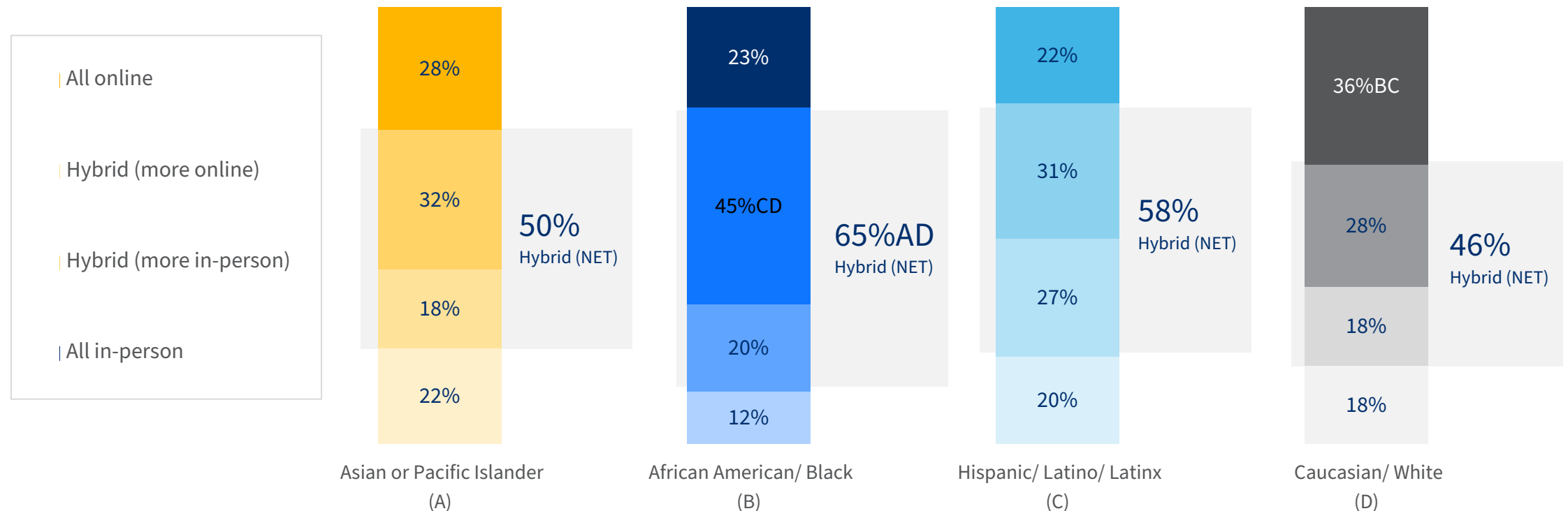


In-person vs. Online Classes

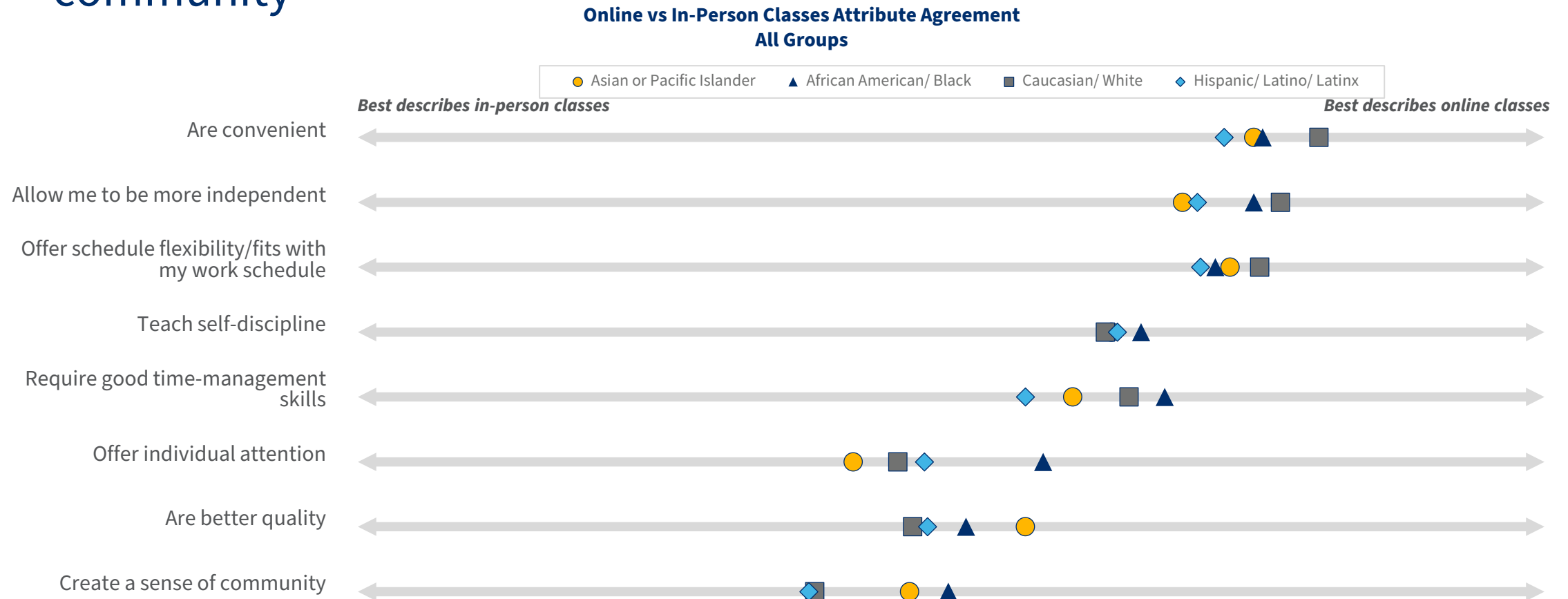
Half of respondents prefer hybrid classes

More African American respondents prefer Hybrid classes

Preference for Online vs In-Person Classes
All Groups



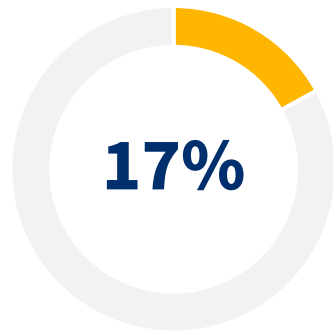
Online classes offer convenience, independence and flexibility while in-person classes offer individual attention, quality and a sense of community



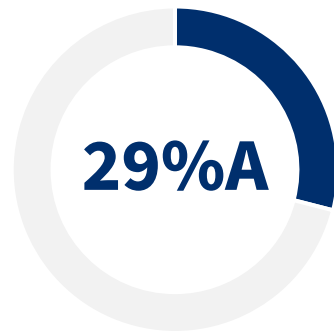
More African American respondents find messaging around support with tech appealing than AAPI respondents

Messaging That Increases Likelihood to Enroll
All Groups

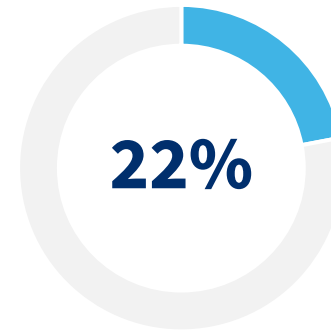
"Many California community colleges offer laptops, WiFi hotspots and internet service which help students in need"



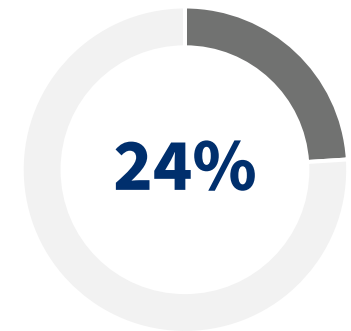
Asian or Pacific Islander
(A)



African American/ Black
(B)










Hispanic/ Latino/ Latinx
(C)



Caucasian/ White
(D)








Information Sources

College websites, web searches followed by Social Media are preferred way for getting college information








| | | Information Sources - Mediums | | | |
|-------------|---|-------------------------------|----------------------------|-----------------------------|------------------|
| | | All Groups | | | |
| | | Asian/Pacific Islander | African American/ Black | Hispanic/ Latino/ Latinx | Caucasian/ White |
| Top 3 | | (A) | (B) | (C) | (D) |
| | College websites  | 57% | 50% | 53% | 53% |
| | Web search  | 59% | 46% | 50% | 57% |
| | Social media  | 36% | 39% | 31% | 35% |
| Differences | Job fair/Career event  | 33%BC | 19% | 15% | 22% |
| | Online influencers  | 18% | 26%C | 12% | 18% |
| | TV  | 17% | 20%D | 11% | 10% |
| | Radio  | 6% | 12%D | 9% | 3% |

YouTube, Facebook and Instagram are the top Social Media platforms to get information about higher education programs

There are some differences between racial/ethnic groups

| | | Information Sources – Social Media | | | |
|-----------|---|------------------------------------|-------------------------|--------------------------|------------------|
| | | Asian/Pacific Islander | African American/ Black | Hispanic/ Latino/ Latinx | Caucasian/ White |
| Base | | 36 (A) | 39 (B) | 31 (C) | 35 (D) |
| YouTube |  | 78%D | 82%D | 74%D | 40% |
| Facebook |  | 56% | 67% | 52% | 60% |
| Instagram |  | 53% | 64% | 65% | 49% |
| Twitter |  | 33% | 28% | 39% | 40% |
| Reddit |  | 19% | 26% | 32% | 29% |
| TikTok |  | 8% | 36%AD | 26% | 14% |
| Snapchat |  | 6% | 15% | 42%ABD | 9% |

YouTube is best to inform High School Students, while older prospects prefer getting information via Facebook

| | | Information Sources – Subgroups | | | |
|-----------|---|---------------------------------|-----------------|-----------------|-----------------|
| | | Target Groups | | | |
| | | HS students | Prospects 18-24 | Prospects 25-34 | Prospects 35-54 |
| Base | | 23 (A) | 24 (B) | 33 (C) | 61 (D) |
| YouTube |  | 87%BC | 58% | 58% | 72% |
| Facebook |  | 39% | 25% | 76%AB | 71%AB |
| Instagram |  | 65% | 63% | 61% | 51% |
| Twitter |  | 17% | 38% | 36% | 39% |
| Reddit |  | 13% | 25% | 33% | 28% |
| TikTok |  | 9% | 17% | 24% | 26% |
| Snapchat |  | 4% | 25%A | 21%A | 16% |

Focus On—Look at Sub-Groups

Target Groups scorecard



Reasons for Consideration

| HS students | Prospects 18-24 | Prospects 25-34 | Prospects 35-54 |
|--|--|---|---|
| It is local and convenient 51% | For a better quality of life 41% | For a better quality of life 37% | It is affordable 48% |
| It is affordable 42% | It is affordable 38% | It is affordable 37% | For a better quality of life 37% |
| For a better quality of life 35% | They offer some classes online 36% | It will help me prepare for a long-term career 32% | It is local and convenient 36% |
| They offer some classes online 35% | I think it will help me get a job that pays well 36% | They offer some classes online 31% | It will help me prepare for a long-term career 35% |
| It offers flexibility in the types of classes 35% | To learn new skills to stay at my current job or to obtain skills for promotion 34% | It is local and convenient 31% | It offers flexibility in the types of classes 35% |
| It is for people like me 35% | It offers flexibility in the types of classes 33% | I think it will help me get a job that pays well 28% | They offer some classes online 33% |
| To transfer into a 4-year college or university 33% | It will help me prepare for a long-term career 32% | It offers flexibility in the types of classes 28% | The programs match my interests 33% |
| I think it will help me get a job quickly 29% | It is local and convenient 30% | To transfer into a 4-year college or university 28% | I think it will help me get a job that pays well 32% |



Enrollment Concerns

| HS students | Prospects 18-24 | Prospects 25-34 | Prospects 35-54 |
|--|--|---|---|
| Courses won't count towards a 4-year degree 40% | No support 25% | Too expensive 25% | Too expensive 28% |
| Enrollment is too complicated 31% | Too long to get a degree/certificate 22% | No support 19% | Class sizes will be too large 24% |
| Too long to get a degree/certificate 27% | Class info is not easily available online 22% | Too long to get a degree/certificate 19% | Class schedule won't suit me 20% |
| No support 27% | Enrollment is too complicated 21% | Class schedule won't suit me 19% | Too long to get a degree/certificate 19% |
| Class sizes will be too large 24% | Too expensive 21% | Won't get the classes wanted 18% | Won't fit in 17% |



Top Consideration Drivers

| HS students | Prospects 18-24 | Prospects 25-34 | Prospects 35-54 |
|--|--|---|---|
| Transferring will save time/money 44% | Flexibility 52% | Financial aid support 47% | Flexibility 49% |
| Feel comfortable/welcomed 42% | Financial aid support 44% | Flexibility 45% | Opportunity for a new career/learn new skills 37% |
| Flexibility 36% | Opportunity for a new career/learn new skills 37% | Opportunity for a new career/learn new skills 35% | Financial aid support 34% |
| Available in-person classes 35% | Abundant campus locations 27% | Online support services 33% | Online support services 35% |
| Financial aid support 29% | Online support services 30% | Programs can lead to in-demand, well-paying jobs 32% | Programs can lead to in-demand, well-paying jobs 29% |
| Online support services 29% | | | |

Region scorecard



Reasons for Consideration

| North Cal | SF & CC | LA / Orange | Far SoCal |
|---|---|--|---|
| Offer some classes online 45% | It is affordable 42% | It is affordable 46% | It is affordable 38% |
| It is affordable 43% | For a better quality of life 40% | It is local and convenient 38% | For a better quality of life 36% |
| For a better quality of life 42% | It is local and convenient 35% | It will help prepare for a long-term career 37% | I think it will help me get a job that pays well 33% |
| It is local and convenient 36% | I think it will help me get a job that pays well 35% | For a better quality of life 34% | It is local and convenient 32% |
| Flexible class types 36% | Offer some classes online 33% | Flexible class types 32% | Flexible class types 32% |
| I think it will help me get a job that pays well 36% | Flexible class types 33% | Offer some classes online 32% | It will help prepare for a long-term career 29% |
| It will help prepare for a long-term career 30% | It will help prepare for a long-term career 32% | Programs match my interests 29% | Offer some classes online 27% |



Enrollment Concerns

| North Cal | SF & CC | LA / Orange | Far SoCal |
|--|---|--|---|
| Class info is not easily available online 26% | Too expensive 25% | Class sizes will be too large 25% | Too expensive 33% |
| No support 21% | Won't count towards a 4-year degree/transfer 24% | Too long to get a degree or certificate 22% | Too long to get a degree or certificate 26% |
| Class schedule won't suit me 21% | Class schedule won't suit me 23% | Too expensive 21% | No support 21% |
| Won't get the classes wanted 21% | Class sizes will be too large 22% | No support 21% | Class schedule won't suit me 18% |
| Too expensive 19% | Too long to get a degree or certificate 19% | Enrollment is too complicated 20% | Won't count towards a 4-year degree/transfer 16% |



Top Consideration Drivers

| North Cal | SF & CC | LA / Orange | Far SoCal |
|--|--|--|---|
| Flexibility 49% | Flexibility 44% | Flexibility 48% | Flexibility 49% |
| Online support services 45% | Financial aid support 39% | Financial aid support 36% | Financial aid support 48% |
| Abundant campus locations 34% | Opportunity for a new career/learn new skills 37% | Opportunity for a new career/learn new skills 34% | Opportunity for a new career/learn new skills 34% |
| Laptops, WiFi hotspots and internet service 34% | Online support services 31% | Online support services 33% | Programs can lead to in-demand, well-paying jobs 33% |
| Financial aid support 30% | Abundant campus locations 30% | Feel comfortable/welcomed 32% | Online support services 26% |

Gender scorecard



Reasons for Consideration

| Male | | Female | |
|--|------------|--|------------|
| It is affordable | 45% | It offers flexibility in the types of classes | 41% |
| For a better quality of life | 38% | It is affordable | 40% |
| It is local and convenient | 35% | They offer some classes online | 38% |
| It will help me prepare for a long-term career | 35% | It is local and convenient | 36% |
| I think it will help me get a job that pays well | 31% | For a better quality of life | 36% |
| They offer some classes online | 30% | I think it will help me get a job that pays well | 30% |
| The programs match my interests | 30% | It will help me prepare for a long-term career | 29% |



Enrollment Concerns

| Male | | Female | |
|---|------------|---|------------|
| Too expensive | 24% | Too expensive | 24% |
| Class sizes will be too large | 21% | Too long to get a degree or certificate | 22% |
| No support | 21% | Class sizes will be too large | 18% |
| Too long to get a degree or certificate | 20% | Class schedule won't suit me | 18% |
| Class schedule won't suit me | 18% | Class info is not easily available online | 18% |



Top Consideration Drivers

| Male | | Female | |
|--|------------|--|------------|
| Flexibility | 46% | Flexibility | 49% |
| Financial aid support | 35% | Financial aid support | 44% |
| Opportunity to retrain for a new career/learn new skills | 35% | Online support services | 36% |
| Online support services | 31% | Opportunity to retrain for a new career/learn new skills | 34% |
| Abundant campus locations | 28% | Programs can lead to in-demand, well-paying jobs | 28% |

San Bernardino/Riverside/Imperial vs. CA scorecard



Reasons for Consideration

| SB/R/I | Rest of CA |
|---|---|
| It is affordable 44% | It is affordable 43% |
| It is local and convenient 34% | For a better quality of life 38% |
| For a better quality of life 34% | It is local and convenient 36% |
| They offer some classes online 34% | They offer some classes online 33% |
| It offers flexibility in the types of classes 32% | It will help me prepare for a long-term career 33% |
| It will help me prepare for a long-term career 30% | It offers flexibility in the types of classes 33% |



Enrollment Concerns

| SB/R/I | Rest of CA |
|---|--|
| Too expensive 32% | Too expensive 23% |
| Too long to get a degree or certificate 30% | Class sizes will be too large 21% |
| No support 20% | Too long to get a degree or certificate 19% |
| Enrollment is too complicated 20% | No support 19% |
| Don't think I will get into the classes I want 20% | Class schedule won't suit me 19% |



Top Consideration Drivers

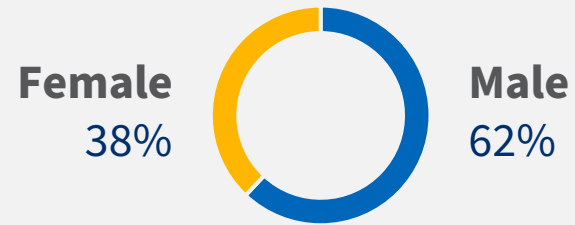
| SB/R/I | Rest of CA |
|---|---|
| Financial aid support 52% | Flexibility 47% |
| Flexibility 44% | Financial aid support 37% |
| Opportunity to retrain for a new career/learn new skills 38% | Opportunity to retrain for a new career/learn new skills 34% |
| Programs can lead to in-demand, well-paying jobs 34% | Online support services 34% |
| Online support services 26% | Programs can lead to in-demand, well-paying jobs 27% |

Demographics

Demographics



Gender

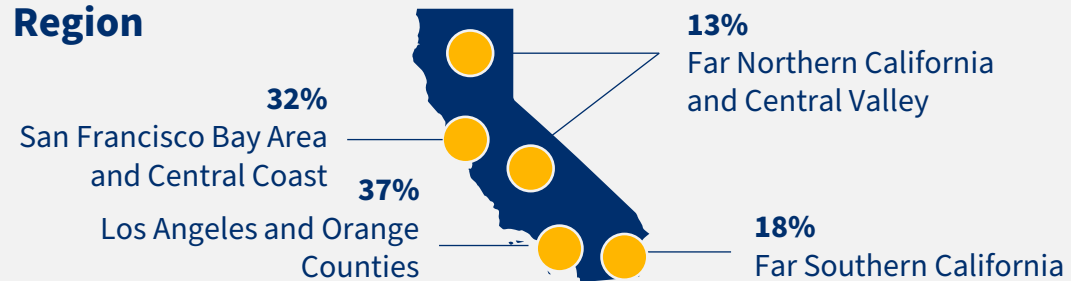


Employment

| | |
|------------------|-----|
| Employed | 63% |
| Unemployed | 15% |
| Student | 14% |
| Full-time parent | 2% |



Region



Target Groups

| | |
|----------------------|-----|
| High School Students | 14% |
| Prospects (18-24) | 18% |
| Prospects (25-34) | 25% |
| Prospects (35-54) | 43% |



HHI

Mean
\$42K

Median
\$43.5K



Ethnicity

