SAN DIEGO & IMPERIAL COUNTIES COMMUNITY COLLEGES STRONG WORKFORCE REGIONAL MARKETING

Cumulative Research Report

August 2022

3fold

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EXECUTIVE SUMMARY

3fold Communications' public perception campaign for the San Diego & Imperial Counties Community Colleges (SDICCC) Strong Workforce Regional Marketing project ("the Region") intends to claim the mindshare of anyone looking to earn an education within the regional boundaries of San Diego and Imperial Counties. The research phase defined the Region's challenges, identified the most effective methodologies for uncovering data and information, synthesized the research findings, and provided the Region with actionable insights to boost public perception and increase the market share of prospective Career Education students in the local community college areas. Beginning in March 2022 and concluding in July 2022, the research included internal studies, content gathering, qualitative research, and quantitative findings.

Timeline of Major Research Phases

	MARCH	APRIL	MAY	JUNE	JULY	AUG
Stakeholder interviews	■	■				
Focus groups		■	■	■		
Surveys				■	■	
Strategy meeting					■	
Reporting						■

Key findings

Significant findings in the research were developed and reported using several methodologies dependent on the data. References included above-average scores on quantitative data, rankings by respondent profile, frequency of terms or phrases used, net scores of quantitative data, and subject matter expertise by the 3fold planning team and Stitch research team.

- **One message does not fit all.** Across all methodologies, each respondent group indicated unique preferences for messages delivered by the community colleges, including channel preferences.
- **Most profiles cared about the idea of belonging.** In all methodologies, each group showed interest in ensuring the end-user (the Career Education student) felt supported in their journey.
- **High school counselors could be the key to long-term Career Education marketing opportunities.** In the quantitative and qualitative studies, the high school counselor profile group showed the highest level of understanding and most positive perceptions of the community college system. However, this group had low unaided awareness. This points to an understanding *and* awareness gap of individual colleges and their resources.
- **It might be time to retire the student story.** In the quantitative surveys, all respondent profiles showed little interest in hearing testimonials from students and alums to advertise Career Education. In addition, all but one group (employers) showed little interest in employer endorsements.

METHODOLOGIES

It is 3fold's intention and goal to capture the opinions, thoughts, and experiences of San Diego and Imperial Counties' diverse communities. Therefore, each methodology must reflect the region polling, including determining equitable outreach methods and capturing various research. Where possible, 3fold partnered with the Region's stakeholders to ensure cultural competency and responsibility throughout the research phase of the Region's project.

Problem statement: There is a mixed perception and lack of awareness of the effectiveness of the Region's Career Education programs and their ability to lead to sustainable careers.

3fold's research was rooted in three objectives: exploring the issues, describing the contributing factors, and identifying the causes.

The purpose of defining exploratory research and collecting data was to understand the nature of the problem statement, including history, background, and "offshoot" ideas and questions that accompany the Region's current or past perception within the public. Exploratory research is not rooted in a specific data point but will instead seek to define the issue's landscape.

Descriptive research measured the depth of the Region's current public perception and its contributing factors.

Causal research identified decisions or trade-offs that occurred or will need to happen to bolster the Region's public perception.

The primary methodologies 3fold used to extrapolate exploratory, descriptive, and causal data were interviews, focus groups, and surveys.

Interviews

3fold used internal interviews to discuss marketing expectations, challenges, and opportunities with stakeholders most closely involved with the Region's marketing project. 3fold's Account Manager and Planning Director conducted the interviews with a scripted questionnaire. The discussions were 45- minutes and captured the personal viewpoints of each stakeholder based on their experience, college/department, and individual role as it pertains to the Strong Workforce marketing project.

Focus Groups

To better understand the complexity of the Region's public perception, 3fold commissioned Stitch Marketing and Research to facilitate a series of focus groups with prioritized respondent profiles.

Surveys

3fold commissioned Stitch Marketing and Research to develop surveys to gather more general responses and feedback from select audiences. Surveys were developed in sync with the Region's stakeholder committee to verify existing data, gauge marketing effectiveness, and maintain alignment with the marketing project's key performance indicators (KPIs).

PHASE I: STAKEHOLDER INTERVIEWS

OVERVIEW

In March and April 2022, 3fold conducted interviews with the Region's primary and secondary project stakeholders. We define stakeholders as having a context, involvement, or valuable information about the Regional Strong Workforce marketing project. These stakeholders included:

- College marketing teams
- Workforce development partners
- District staff
- Deans and associate deans

In total, 3fold met with and interviewed 34 people from 45 minutes to one hour. This report captures the themes of the content and critical findings and

provides recommendations for marketing goals and stakeholder management throughout the project.

KEY FINDINGS

- Marketing has been missing the adults
- Careers, not programs (or other internal lingo)
- Multicultural is a default
- The marketing goal must be perception change

Marketing has been missing the adults

In many of the interviews, we heard a keyword: adult learners. For most instances, the interviewee was pointing out a lack of connection to the adult learner:

- "Most of our marketing efforts are around K-12, but we're missing out on the adult (learner)."

- "San Diego is growing in general from immigrants moving into the market, so we're missing those people that want training."

- "A lot of the new jobs require new skills so working learners are the ones we should start marketing to and creating programs for that market."

- "There are people who have been to high school, didn't do well, then went to the 'real world' and weren't fulfilled. Now they are 28 years old and have an awakening that they must do something."

- "At Southwestern we have focused in the past on K-12 but not on adults or the workforce and I think there are other audiences that could be targeted."

- "I'm interested to know what adult learners think of CTE."

- "(The barriers for adult learners) are feeling like going back to college makes it seem like they didn't succeed originally. Going back to college makes it seem like they had to go back because they didn't learn more... it sounds like they failed the first time."

- "Adult learners, 25+, are so crucial and (we) see data that supports this."

- "We haven't historically been good at targeting displaced workers, or adult learners."

- "We've lost a lot of adult learners... there are equity gaps."

- "... Adult learners and disconnected youth (need to) know that we offer affordable training and that gets them increased wages."

Careers, not programs (or other internal lingo)

When prompted to discuss marketing content, specifically key messaging to increase interest in community college Career Education programs, many interviewees promoted the idea of talking about careers and not singular programs or other 'inner workings (like specific pathways, technical terms)' at the college or regional level:

- "A student doesn't say they are a Career Education student because even internally some don't know what that means... can't explain the programs and what they offer."

- "We can't get down to the nitty-gritty of impacting enrollment, but I think we can move to demystify the value of a career."

- "We are moving away from the moniker of 'career education' and moving towards business and technology... that's really what we're teaching."

- "One of the goals we've talked about is not to (talk) about education but leading with the career."

- "Audiences don't want to know about programs, but about careers they can have."

- "How do we help students and parents recognize their career choice in the future?"

- "The term 'career education' might not resonate as much seeing as older learners already have a job."

- "Students may not be inclined to watch something about (career) technical education programs..."

Multicultural is a default

Most interviewees discussed ensuring the campaign is relevant to the varying demographics of their region. This includes making marketing accessible by providing translations and culturally competent messaging:

- "A group to keep in mind is ESL, especially in Spanish, because at a minimum I consider a percentage of outreach should be bilingual."

- "It's been very frightening for Dreamers... with the last President... those programs really suffered."

- "70% of residents are Spanish speakers, and they (the Region) don't do any outreach in Spanish."

- "We didn't even touch upon Spanish speakers - that is a whole different group."

- "We try to do most outreach marketing in three languages, minimum: Spanish, Arabic, and English. We'd like to move into some additional translation but don't have staff on campus right now."

- "Looking at demographics is important. San Diego regional education shows the demographic student population in 7th grade are mostly Hispanic. But looking at people in careers it's mostly the Asian demographic. How do we make them match?"

- "Unfortunately, we have lost Black, African American, and Hispanic students in (large) percentages, especially Black students over the last three years."

- "For 2022-23, we are starting to focus on enrollment and doing targeted outreach in the backcountry, very targeted for Black and African American (students). We are also the largest Middle Eastern community and refugee population so we will be reaching out to them, too."

The marketing goal must be perception change

When asked to define the marketing goal for the Region, we heard a mix of boosting enrollment, changing perceptions, or increasing awareness. However, a majority (58%) said we will be successful when changing the perception of

community college Career Education programs [The other percentages were enrollment (16%) and awareness (26%)]:

- "If we can bring something different, it'll be a public perception shift."

- "We are figuring out the perception of the people who are aware of us."

- "We have to spend a lot of our time overcoming perceptions."

- "As an institution, you have to build enrollment, but from a dean's perspective and the image (they) want to display, the perception of community college is (important)."

- "There is a level of perception that we need to address, the perception of K-12 partners of IVC is not good, especially with teachers. A lot of educators in the county don't have a lot to say about IVC but it's a perception issue because they hear one strand of information from a small group of individuals..."

- "Enrollment and perception are tied together. (We) need to be seen as the better value and if we are (seen as the better value) then enrollment would be better."

- "Perception of community colleges is still not what it should be, and it's still seen as 'less than.'"

- "Perception has been and will be the biggest obstacle to everything... enrollment would be a result of public perception being enhanced."

- "Everything will change based on our ability to communicate and change the public's perception."

- "Perception is the most important long term because to the public, colleges have become very transactional... students are customers that are not choosing us, and we know that we have to change people's perceptions about community college..."

- "For perception, it's been (this way) since before 2001 and I speak to parents and go to high schools."

- "I feel that if we change perception, enrollment will increase."

- "Focusing on perception change makes the most sense... In terms of overall perception (we don't) want to be the backup plan."

The full Phase I research report can be found linked in the Appendix.

PHASE II: QUALITATIVE

OVERVIEW

In partnership with Stitch Marketing and Research, 3fold coordinated a series of focus groups in May and June 2022. In conjunction with the SDIC executive team, we identified five respondent profiles to prioritize (Note: Profile 5, prospective students, is segmented into subgroups). These were:

- Employers – San Diego and Imperial Counties
- Policymakers and decision-makers – San Diego and Imperial Counties education and workforce development leaders
- Parents and guardians – Families and caretakers of regional high school juniors and seniors in San Diego and Imperial Counties
- High school counselors – San Diego and Imperial Counties

- Prospective students – Career Education, transitional age (18-24 years old)
- Prospective students – Career Education, specifically adult learners (25+ years old)
- Prospective students – Career Education, geographic and demographic outliers in Imperial County

There were 11 group sessions, two individual interviews, and 73 respondents. Stitch facilitated the 90-minute sessions over Zoom and in person in Imperial Valley.

The respondent criteria included:
- Higher education relevancy
- Mix of race/ethnicity
- Relevant age segmenting
- Geographic mix within the Region

KEY FINDINGS

Without a straightforward narrative on what community college Career Education is, the consensus drifts toward what community college Career Education is not.

During the focus groups, we learned that the Region (all community colleges in San Diego and Imperial Counties) had a significant understanding gap. Findings included:

- Employers with favorable views of the colleges don't know the depth of offerings

- High school counselors who advise "exploring all options" to their students are not equipped to represent community colleges accurately
- Adult learners who have no experience at community colleges have little to no awareness of Career Education certificate options, or the straightforward career pathways available upon completion
- Younger prospective students, those out of high school, have no awareness of the community colleges as anything other than a launchpad to a 4-year university
- What drives current perceptions of community college education in 2022 are historical perceptions, historical facts, parent chatter, and peer gossip

The full qualitative presentation, including videos with respondents, can be found linked in the Appendix

PHASE III: QUANTITATIVE

OVERVIEW

In partnership with Stitch Marketing and Research, 3fold coordinated web-based survey distribution to 478 respondents in July 2022. These profiles included:

- Prospective students – Career Education, 18+, San Diego and Imperial Counties
- Parents and guardians – Families and caretakers of regional high school juniors and seniors, San Diego, and Imperial Counties
- Employers – San Diego and Imperial County
- High school counselors – San Diego and Imperial Counties

In total, there were 478 responses: 321 prospective students, 62 parents and guardians, 57 employers, and 38 high school counselors.

The respondent criteria included:

- Higher education relevancy and intention to pursue college or knows someone who has the intention to pursue college

Additional data about the respondents' demographic and psychographic information can be found in the Appendix.

KEY FINDINGS

Higher education is a better life, a post-high school education, a university, or mastery of skills.

The survey was categorized into several sections intended to peel back the layers of community college Career Education within the context of the respondent's own life. The categories of prompts included:

- Defining higher education
- Higher education agreement statements
- Perceived benefits of community college
- Perceived traits of community college
- Current awareness and perceptions, including that of individual colleges

- Resonance of language
- Positioning responses
- Topics of interest
- Advertising touchpoints
- Preferred media
- Current media consumption

Of these categories, the topline implications of the survey were:

- Tactical information (e.g., costs/tuition) about Career Education are most valuable across all respondent profiles
- Employers are on the fence when it comes to the value of a bachelor's degree or four-year "traditional" degree for their employees
- Social media marketing is #1 for all respondent profiles

Defining higher education

Higher education definition

When respondents were asked, "When you hear the term 'higher education,' what do you think of? In other words, how would you define what 'higher education' is to someone who had never heard of that term?" here is what they said:

- "For me, a higher education is something important. I like to describe it as an opportunity for a better future." – Prospective student
- "Higher education is the third level of education after leaving school." – High school counselor
- "Going to college and getting a bachelor's or a master's degree." – Parent
- "I think of specialized research and training for professionals." – Employers

Unaided, Top Mentions

- Prospective students: Better life
- Parents and caretakers: University
- High school counselors: Post-high school education

- Employers: Post-high school education

Unaided, Top Mention for All Profiles

- Post-high school education

COMMUNITY COLLEGE IS... [sorted by Prospective Students]	Prospective Students	Parents & Caretakers	High School Counselors	Employers
For just about anyone	81%	80%	63%	84%
For someone trying to figure out what to do next	76%	77%	50%	81%
For someone wanting to make smart choices	60%	61%	58%	56%
For someone with a plan	45%	44%	42%	53%
For someone wanting to get right to work–get a job	25%	11%	61%	25%

Based on the chart above, we know high school counselors are the most likely to say that community college is for someone wanting to get right to work – to get a job. Meanwhile, parents and caretakers are the least likely to feel this way. Additionally, high school counselors are the least likely to say community college is for just about anyone or someone trying to figure out what to do next.

Higher education agreement statements

Next respondents were asked, "How much do you agree or disagree with the following statements that some people have made about education after high school?"

PROSPECTIVE STUDENTS [n=282] [sorted by Most Agreement]	Generally Agree	Not sure about this	Generally Disagree
You can create your own career without any education at all after high school.	54%	16%	30%
A bachelor's degree is a minimum requirement to get a decent job these days.	53%	16%	31%
A 4-year degree will always be the best education anyone can get after high school.	49%	18%	33%
It's not worth it to go into a lot of debt for a college education.	46%	21%	33%
Job training is more valuable than a general education.	44%	24%	32%

PARENTS & CARETAKERS [n=61] [sorted by Most Agreement]	Generally Agree	Not sure about this	Generally Disagree
A bachelor's degree is a minimum requirement to get a decent job these days.	68%	11%	21%
A 4-year degree will always be the best education anyone can get after high school.	54%	16%	30%
Job training is more valuable than a general education.	52%	25%	23%
You can create your own career without any education at all after high school.	43%	26%	31%
It's not worth it to go into a lot of debt for a college education.	41%	28%	31%

HIGH SCHOOL COUNSELORS [n=38] [sorted by Most Agreement]	Generally Agree	Not sure about this	Generally Disagree
A bachelor's degree is a minimum requirement to get a decent job these days.	61%	2%	37%
A 4-year degree will always be the best education anyone can get after high school.	58%	0%	42%
Job training is more valuable than a general education.	56%	5%	39%
You can create your own career without any education at all after high school.	39%	5%	56%
It's not worth it to go into a lot of debt for a college education.	34%	13%	53%

EMPLOYERS [n=57] [sorted by Most Agreement]	Generally Agree	Not sure about this	Generally Disagree
A bachelor's degree is a minimum requirement to get a decent job these days.	68%	11%	21%
You can create your own career without any education at all after high school.	47%	18%	35%
Job training is more valuable than a general education.	46%	28%	26%
A 4-year degree will always be the best education anyone can get after high school.	44%	26%	30%
It's not worth it to go into a lot of debt for a college education.	44%	21%	35%

In this category, we learned that, on average, more students agreed with many statements.

Most students also weren't sure that job training is more valuable than a general education or that a four-year degree will always be the best education anyone can get after high school.

Students show diverse beliefs about what higher education can do for their career competitiveness and education fulfillment after high school – neither the "generally agree" nor "generally disagree" groups were vastly higher or lower than the average score.

However, most parents (68%) agreed that a bachelor's degree is a minimum requirement to get a decent job.

On average, most high school counselors agreed with parents and determined that a four-year will always be the best education anyone can get after high school, and job training is more valuable than a general education. In addition, high school counselors know that to be competitive in today's career marketplace, candidates need sufficient expertise that, historically, four-year colleges and universities offered.

Employers showed the most unsureness about the higher education statements. However, a majority (68%) agreed that a bachelor's degree is the minimum to getting a decent job. In addition, employers are showing more interest in what candidates' post-secondary schooling looks like; there is still a widely held belief that a four-year degree is supreme.

Perceived benefits of community college

Next, we asked respondents to rank community colleges' perceived benefits – why certain features are most important. The survey found that:

- Practical benefits led the discussion, specifically "pre-requisites" and "affordability."
- Exploratory benefits are on the respondents' radar, including courses they can "try on."
- Employers see the most value in community college benefits overall
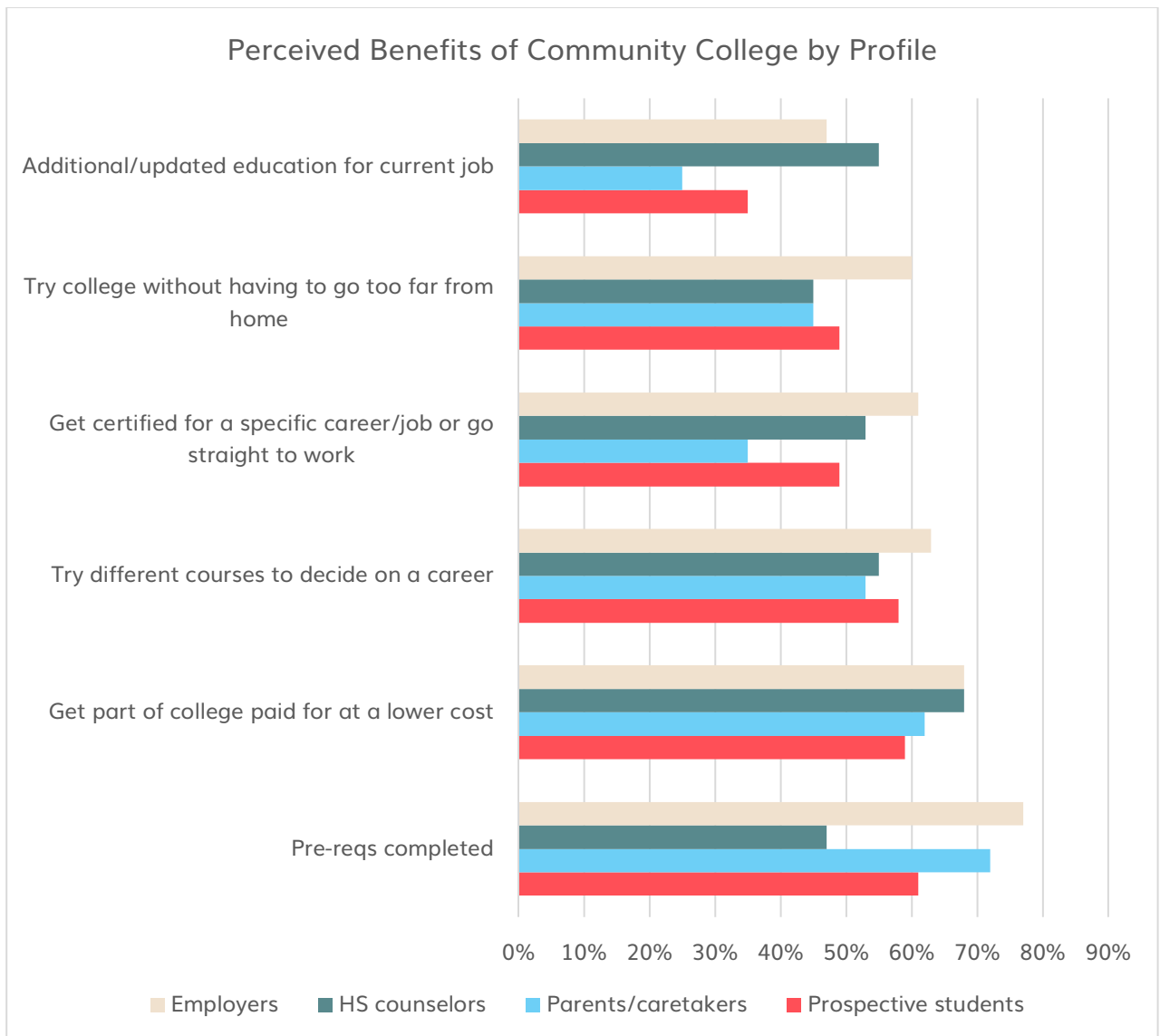
Perceived Benefits of Community College by Profile

Perceived traits of community college

Next, we asked respondents to rank community colleges' perceived traits – the characteristics–. The survey found that:

- All profiles were most in agreement in the areas of affordability, community college becoming a popular choice, and it being part of an intelligent plan
- Most profiles were in a minor agreement that community college is for students who have a specific goal
- High school counselors emerged as the most optimistic of the respondent profiles about the traits of community college

Perceived Traits of Community College by Profile

Legend: Employers, HS counselors, Parents/caretakers, Prospective students
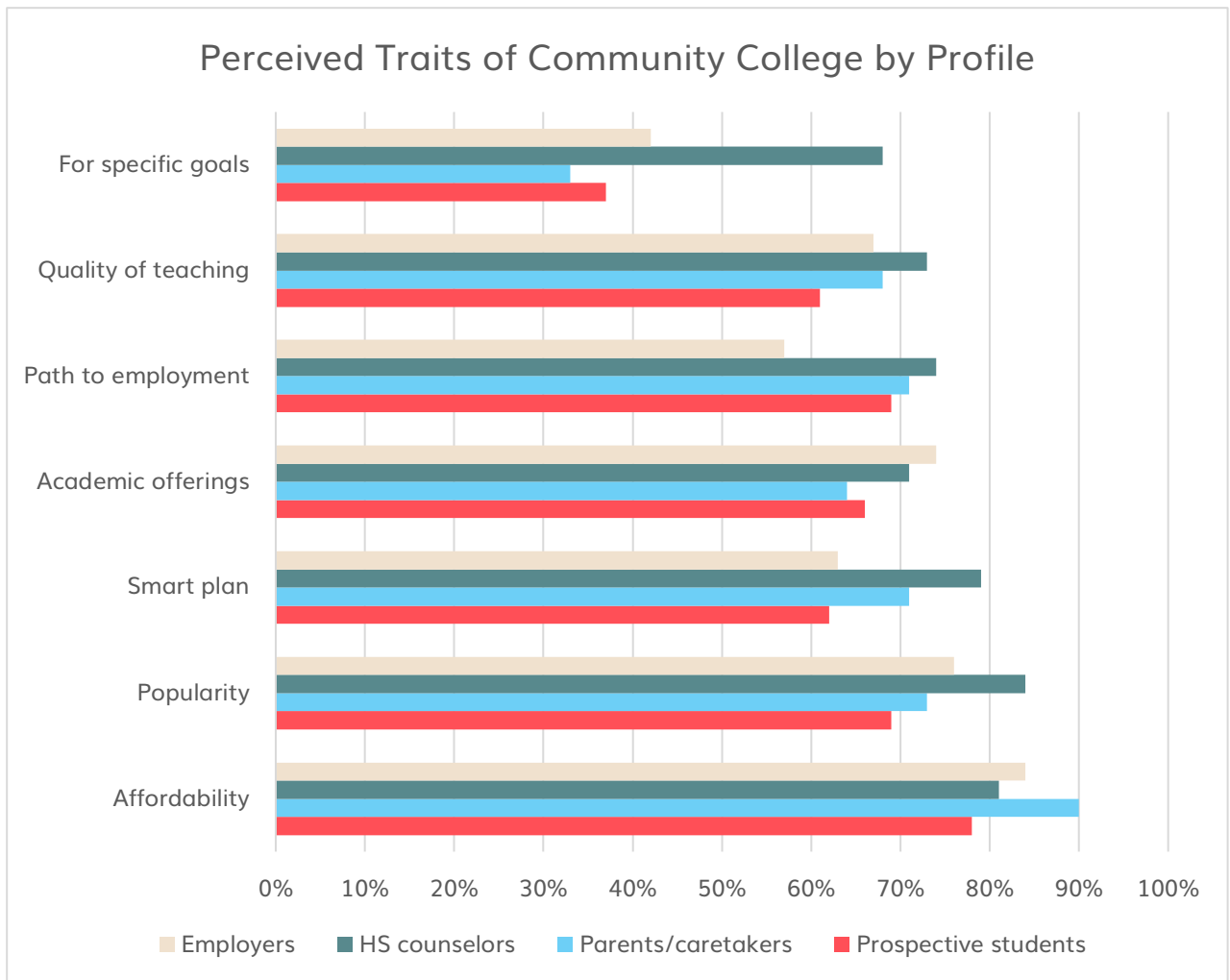
Current awareness and perceptions of the Region's colleges

Unaided Awareness

To gain a better understanding of how the individual college's awareness ranked against alternative colleges or universities, we determined the unaided awareness of each college by asking, "When you think of colleges or universities in the San Diego or Imperial County region, which institution(s) first come to mind?" Then, we asked respondents to pull from memory without looking anything up.

UNAIDED MENTIONS – FIRST MENTION [sorted by Prospective Students]	Prospective Students [n=205]	Parents & Caretakers [n=55]	Counselors [n=19]	Employers [n=52]
SDSU	47%	35%	5%	48%
UC San Diego	23%	27%	26%	21%
San Diego City College	3%	2%	0%	2%
CSUSM	3%	9%	0%	2%
Southwestern College	3%	7%	5%	2%
Palomar College	3%	5%	11%	10%
Mira Costa College	3%	2%	11%	2%
Mesa College	2%	0%	0%	2%
Grossmont College	2%	4%	0%	4%
University of San Diego	2%	2%	11%	2%
"San Diego Community College"	1%	4%	0%	2%
Imperial Valley College	1%	0%	5%	0%
UCLA	1%	2%	5%	0%
Others	*4%*	*2%*	*21%*	*4%*

Most respondents indicated high levels of awareness for two prominent four-year universities – San Diego State University and UC San Diego. The community colleges with the highest unaided awareness were Southwestern College, Palomar College, and MiraCosta College.

Aided Awareness

The respondent profile with the leading awareness of the Regional community colleges were high school counselors. The colleges with the most aided awareness of the Region were San Diego City College and San Diego Mesa College.

The graphics for each profile illustrating the aided awareness of the Regional colleges is available in the Appendix.

Perception

The respondent profile with the highest positive perceptions of the Regional colleges were employers. Additionally, most colleges received very minimal negative perceptions. Finally, most colleges had strong neutral perceptions across all profiles. This finding suggests a low overall understanding of the colleges as individual units and a larger consortium.

The graphics for each profile illustrating the perception of the Regional colleges is available in the Appendix.

Resonance of language

As part of the quantitative surveys, 3fold provided a matrix of words and phrases for all profiles to select from to indicate their resonance. We determined the following:

Words that work

- "Career"
- "Development"
- "Training

Words that don't work as well

- "Upskilling"
- "Reskilling"
- "Vocational"

Resonance of Language by Profile

- "Reskilling"
- "Upskilling"
- "Adult education"
- "Vocational training"
- "Occupational training"
- "Industry certifications"
- "Continued education"
- "Educational progression"
- "Direct to career pathways"
- "Job training"
- "Higher education"
- "Skills development"
- "Career Education"

0% 20% 40% 60% 80% 100% 120%

Employers ■ HS counselors ■ Parents/caretakers ■ Prospective students

Positioning responses

While we were testing language that resonated with the respondent profiles, we also wanted to test positioning opportunities. That is, a brief description of

how the Regional colleges' Career Education programs fulfill a need for our respondents that competitors cannot. Here's what we learned:

- Phrases that indicate taking care of the "whole student" tested well among profiles, but especially with parents and caretakers
- Phrases that indicate community college is where the student "starts" tested well with all profiles (Note: The statement "A four-year degree starts here" tested in the top three of most resonant statements with all profiles.)
- Phrases that contain the word "find" test the highest with all profiles
- High school counselors indicated the most interest in all positioning statements
- Parents and caretakers showed the least interest in all positioning statements

The following chart illustrates which positioning responses were selected as "this really resonates with me" among all profiles.

Positioning Responses by Profile

"Not your parents' community college"

"It's not for everyone, it's for me"

"The place to go when you're going places"

"The most useful education"

"The most valuable education"

"Get work-ready here"

"Start here, go there"

"Supporting the whole student"

"A four-year degree starts here"

"A college built for all your needs"

"Find your career here"

"Find where you belong"

0% 10% 20% 30% 40% 50% 60%

Employers   HS counselors   Parents/caretakers   Prospective students

Topics of interest

When asked, "What are the most valuable information a community college can give you?" respondents indicated the most and least valuable topics of interest. Here's what we learned:

- Costs/tuition were the most critical topic of interest for prospective students, parents and caretakers, and employers
- All profiles signaled that knowing the types of jobs/careers that they could obtain was very important to them
- High school counselors were the only profile to indicate how transferrable classes or degrees can be to other institutions as their highest-ranked topic
- All profiles were least interested in testimonials (from students or alums)
- All profiles except for employers were least interested in endorsements from employers

PROSPECTIVE STUDENTS [n=321] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
Costs/tuition	18%	40%	64%
Types of jobs/careers that could be obtained	15%	35%	64%
Types of classes	9%	30%	60%
How classes or degrees can be transferred to other institutions	10%	23%	57%
The quality of the professors	8%	25%	55%
Class schedules (days and times, etc.)	6%	22%	55%
What student life is like	4%	15%	47%
Testimonials from students	4%	12%	40%
What the on-campus experience is like	2%	12%	48%
Endorsements from employers	2%	11%	41%
Testimonials from alumni	2%	9%	40%
What the makeup of the student body is like	2%	6%	41%

PARENTS & CARETAKERS [n=62] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
Costs/tuition	16%	50%	73%
Types of classes	21%	42%	66%
How classes or degrees can be transferred to other institutions	13%	44%	61%
Types of jobs/careers that could be obtained	13%	35%	65%
Class schedules (days and times, etc.)	10%	23%	55%
The quality of the professors	6%	19%	52%
What the on-campus experience is like	2%	15%	37%
Testimonials from students	5%	8%	39%
Testimonials from alumni	2%	10%	35%
What the makeup of the student body is like	2%	8%	29%
What student life is like	0	6%	32%
Endorsements from employers	2%	3%	29%

HIGH SCHOOL COUNSELORS [n=38] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
How classes or degrees can be transferred to other institutions	16%	42%	97%
Costs/tuition	8%	32%	84%
What the makeup of the student body is like	11%	29%	84%
Types of jobs/careers that could be obtained	13%	26%	89%
What the on-campus experience is like	11%	26%	84%
Testimonials from students	8%	24%	79%
Testimonials from alumni	5%	24%	87%
The quality of the professors	5%	24%	84%
Types of classes	8%	18%	79%
Endorsements from employers	5%	21%	82%
What student life is like	5%	18%	79%
Class schedules (days and times, etc.)	5%	13%	87%

EMPLOYERS [n=57] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
Costs/tuition	19%	47%	82%
Types of jobs/careers that could be obtained	18%	46%	81%
How classes or degrees can be transferred to other institutions	16%	35%	79%
Types of classes	12%	39%	74%
Testimonials from alumni	7%	21%	53%
Endorsements from employers	5%	23%	58%
Testimonials from students	4%	21%	60%
The quality of the professors	5%	16%	58%
Class schedules (days and times, etc.)	2%	16%	68%
What student life is like	7%	9%	49%
What the on-campus experience is like	4%	9%	53%
What the makeup of the student body is like	2%	5%	42%

Advertising touchpoints

To better understand current or past marketing resonance, were asked respondents, "Which types of advertising, if any, do you recall for community colleges in the Region?" Here is what we learned:

- Parents and caretakers were the least likely of all profiles to recall marketing/advertising by the community colleges
- Employers had the highest recall of outdoor advertising like billboards and bus sides
- Students were generally aware of most advertising
- High school counselors had the highest recall for the highest amount of advertising tactics, including online ads (not on social media), TV, email, ads on billboards, on buses, or other outdoor ads, and mail/flyers

COMMUNITY COLLEGE ADVERTISING RECALL [sorted by Prospective Students]	Prospective Students	Parents & Caretakers	High School Counselors	Employers
Ads on Social Media	39%	19%	42%	32%
Online ads (not on social media)	39%	18%	74%	32%
TV	39%	25%	50%	35%
Email	38%	12%	61%	19%
Ads on billboards, on buses, or other outdoor ads	36%	18%	34%	42%
Mail/Flyers	33%	37%	42%	37%
Radio	22%	23%	21%	26%
Magazines or other print advertising	18%	7%	13%	18%
I don't recall any ads or promotions for Community Colleges	13%	26%	3%	16%

Preferred media

Each profile has a unique advertising fingerprint. Students, parents, counselors, and employers want to consume and interact with media differently. To better learn our audiences' consumption habits, we asked respondents, "If a local college was to communicate to you about what they have to offer, what would be the smartest way to connect?" Here's what we learned:

- Prospective students ranked social media posts (not social media ads) as their highest preference for community college media
- All profiles indicated influencers, vlogs, and YouTubers were their most minor preferred point of connection with community colleges
- All profiles showed interest in social media ads as a point of connection with community colleges

PROSPECTIVE STUDENTS [n=321] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
Social media posts	29%	46%	60%
Social media ads	14%	40%	60%
YouTube ads	6%	29%	57%
Email marketing	9%	22%	55%
Physical mail/flyers	7%	17%	45%
Ads on billboards, on buses, or other outdoor ads	4%	20%	51%
Vlogs/YouTubers	4%	20%	43%
Blogs/online articles	2%	13%	42%
Ads on music apps like Spotify or Pandora	1%	9%	40%
Radio ads	2%	7%	38%
Influencers	2%	7%	33%
Others	2%	3%	18%

PARENTS & CARETAKERS [n=62] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
Social media posts	27%	42%	60%
Physical mail/flyers	19%	40%	65%
Email marketing	8%	40%	56%
Ads on billboards, on buses, or other outdoor ads	10%	31%	58%
Radio ads	11%	29%	58%
Social media ads	5%	23%	47%
Vlogs/YouTubers	5%	11%	39%
Blogs/online articles	3%	13%	44%
YouTube ads	2%	13%	47%
Ads on music apps like Spotify or Pandora	0	10%	39%
Influencers	0	2%	34%
Others	0	0	23%

HIGH SCHOOL COUNSELORS [n=38] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
Social media ads	21%	42%	89%
Influencers	18%	29%	89%
Vlogs/YouTubers	13%	32%	82%
Email marketing	11%	34%	84%
Ads on billboards, on buses, or other outdoor ads	8%	32%	84%
Ads on music apps like Spotify or Pandora	8%	32%	87%
Social media posts	5%	32%	89%
YouTube ads	5%	26%	84%
Blogs/online articles	5%	13%	79%
Radio ads	5%	11%	82%
Physical mail/flyers	0	13%	82%
Others	0	3%	50%

EMPLOYERS [n=57] [sorted by #1 + Top 3]	RANKED #1	RANKED Top 3	RANKED [at all]
Social media ads	14%	49%	72%
Social media posts	19%	42%	63%
Physical mail/flyers	19%	35%	56%
Ads on billboards, on buses, or other outdoor ads	12%	30%	63%
Email marketing	9%	32%	60%
Radio ads	12%	23%	61%
Blogs/online articles	7%	19%	53%
YouTube ads	5%	16%	53%
Influencers	2%	16%	46%
Ads on music apps like Spotify or Pandora	0	12%	51%
Vlogs/YouTubers	0	11%	44%
Others	0	0	32%

Additional data and graphics about the respondents' media consumption can be found in the Appendix.

APPENDIX

Respondent demographic/psychographic data and graphics

Respondent Map
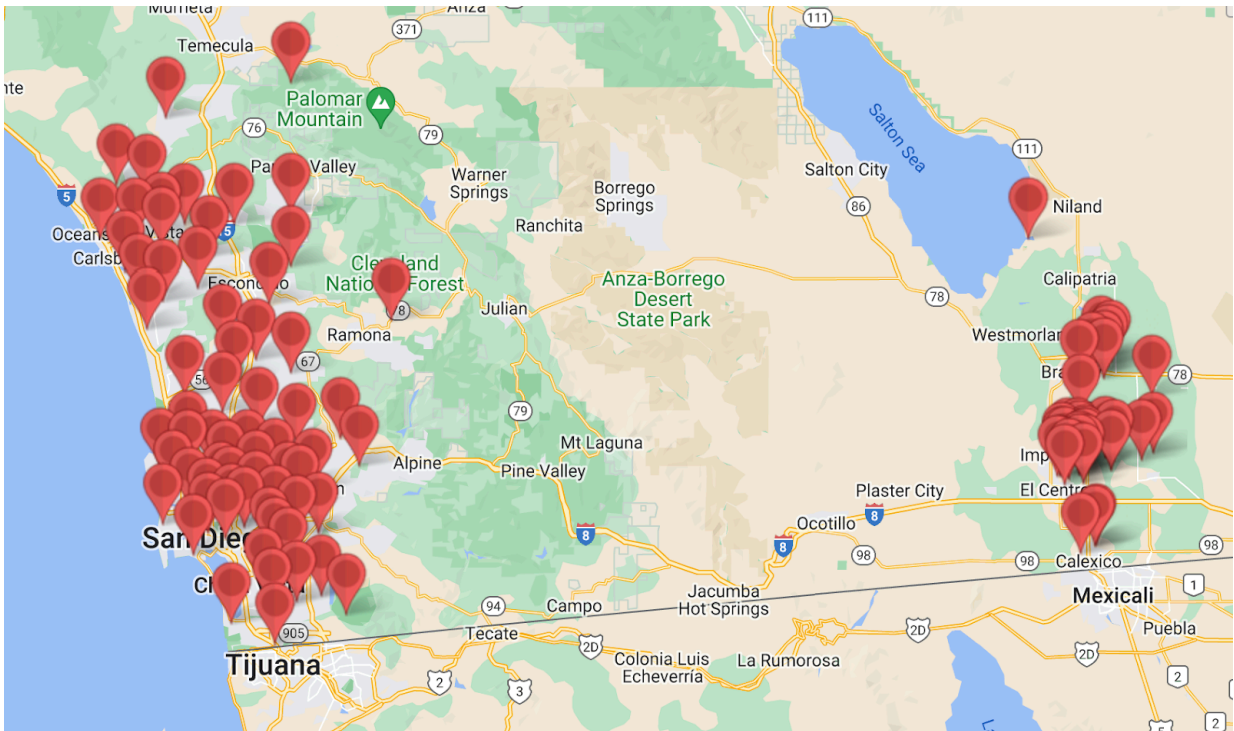
Level of Educational Attainment

EDUCATION LEVEL COMPLETED	Prospective Students	Parents & Caretakers	High School Counselors	Employers
GED	2%	2%	0	0
Some high school or less	9%	5%	0	0
High school diploma	35%	13%	0	9%
Vocational/Technical certificate	7%	18%	5%	12%
Associate degree	19%	11%	3%	16%
Bachelor's degree	21%	41%	18%	44%
Master's Degree	6%	11%	63%	16%
Professional degree	<1%	0	5%	0
Doctoral Degree	<1%	0	5%	4%

Race/Ethnicity

RACE/ETHNICITY [sorted by Prospective Students]	Prospective Students	Parents & Caretakers	High School Counselors	Employers
Caucasian	56%	68%	71%	68%
Hispanic / Latino	30%	27%	11%	12%
Asian / Pacific Islander	13%	11%	5%	14%
African American / Black	11%	5%	16%	9%
American Indian / Other Native American	3%	0	0	7%
Middle Eastern	<1%	2%	0	0
Other	1%	2%	0	2%
Prefer not to answer	1%	0	0	0

Gender

GENDER [sorted by Prospective Students]	Prospective Students	Parents & Caretakers	High School Counselors	Employers
Female	55%	61%	39%	65%
Male	40%	39%	61%	35%
Non-binary	3%	0	0	0
Prefer not to answer	2%	0	0	0

Household Makeup

HOUSEHOLD MAKEUP [sorted by Prospective Students]	Prospective Students	Parents & Caretakers
Single adult	57%	16%
Married couple	29%	75%
Child(ren) 10 years or younger at home	14%	7%
Child(ren) 11 to 17 years of age at home	12%	63%
Unmarried partners	11%	4%
Adult child(ren) at home	9%	32%
Unrelated adults	3%	0
Adult child(ren) no longer at home	3%	5%
Prefer not to answer	3%	2%

Household Income

HOUSEHOLD INCOME [sorted by Prospective Students]	Prospective Students	Parents & Caretakers
$19,999 or less	13%	2%
$20,000 to $29,999	11%	4%
$30,000 to $39,999	8%	4%
$40,000 to $49,999	8%	5%
$50,000 to $59,999	9%	11%
$60,000 to $69,999	6%	5%
$70,000 to $79,999	9%	7%
$80,000 to $89,999	9%	9%
$90,000 to $99,999	6%	14%
$100,000 to $124,999	6%	7%
$125,000 to $149,999	4%	11%
$150,000 or more	5%	16%
Prefer not to answer	8%	5%

Current awareness and perceptions data and graphics

Prospective Students – Aided Awareness

College	I'm familiar with this college	I know the name only	I'm not at all familiar with this college
San Diego City College	53%	30%	17%
San Diego Mesa College	43%	38%	19%
San Diego Miramar College	43%	36%	21%
Palomar College	43%	34%	23%
Grossmont College	42%	31%	27%
Southwestern College	38%	32%	30%
MiraCosta College	33%	36%	31%
Cuyamaca College	29%	32%	39%
San Diego College of…	25%	26%	49%
Imperial Valley College	13%	35%	52%

Legend: ● I'm familiar with this college ● I know the name only ● I'm not at all familiar with this college

Prospective Students – Perception

College	Positive	Neutral	Negative
San Diego City College	56%	41%	
Grossmont College	50%	47%	
Palomar College	50%	46%	
San Diego Miramar College	50%	47%	
MiraCosta College	49%	48%	
San Diego Mesa College	49%	47%	
San Diego College of…	45%	50%	
Cuyamaca College	42%	54%	
Southwestern College	41%	52%	7%
Imperial Valley College	40%	55%	

Legend: ● Positive ● Neutral ● Negative

Parents/Caretakers – Aided Awareness

College	I'm familiar with this college	I know the name only	I'm not at all familiar with this college
Grossmont College	67%	23%	10%
San Diego City College	64%	25%	11%
San Diego Mesa College	54%	36%	10%
Southwestern College	54%	23%	23%
San Diego Miramar College	52%	36%	12%
Palomar College	48%	46%	
Cuyamaca College	43%	31%	26%
MiraCosta College	36%	51%	13%
San Diego College of…	23%	36%	41%
Imperial Valley College	8%	46%	46%

● I'm familiar with this college ● I know the name only
● I'm not at all familiar with this college

Parents/Caretakers – Perception

College	Positive	Neutral	Negative
Southwestern College	68%	32%	
San Diego City College	67%	33%	
Grossmont College	65%	35%	
Cuyamaca College	62%	36%	
San Diego Mesa College	58%	40%	
San Diego Miramar College	57%	43%	
San Diego College of…	56%	44%	
Palomar College	51%	49%	
MiraCosta College	40%	60%	
Imperial Valley College	27%	70%	

● Positive ● Neutral ● Negative

HS Counselors – Aided Awareness

College	I'm familiar with this college	I know the name only	I'm not at all familiar with this college
San Diego City College	61%	34%	
San Diego Mesa College	53%	42%	
San Diego College of…	50%	42%	8%
San Diego Miramar College	45%	50%	
Cuyamaca College	42%	39%	19%
Imperial Valley College	42%	42%	16%
MiraCosta College	42%	47%	11%
Palomar College	42%	45%	13%
Southwestern College	37%	55%	8%
Grossmont College	24%	63%	13%

Legend: ● I'm familiar with this college ● I know the name only ● I'm not at all familiar with this college

HS Counselors – Perception

College	Positive	Neutral	Negative
San Diego City College	67%	31%	
San Diego College of…	60%	40%	
Grossmont College	58%	39%	
Palomar College	48%	45%	7%
San Diego Mesa College	47%	53%	
Imperial Valley College	44%	47%	9%
MiraCosta College	44%	50%	
San Diego Miramar College	44%	53%	
Southwestern College	37%	60%	
Cuyamaca College	29%	71%	

Legend: ● Positive ● Neutral ● Negative

Employers – Aided Awareness

College	I'm familiar with this college	I know the name only	I'm not at all familiar with this college
San Diego Mesa College	63%	28%	9%
Palomar College	60%	37%	
San Diego City College	60%	33%	7%
MiraCosta College	58%	32%	11%
San Diego Miramar College	54%	33%	13%
Grossmont College	53%	39%	9%
Southwestern College	40%	42%	18%
Cuyamaca College	33%	46%	21%
San Diego College of…	32%	25%	44%
Imperial Valley College	11%	44%	46%

Legend:
- I'm familiar with this college
- I know the name only
- I'm not at all familiar with this college

Employers – Perception

College	Positive	Neutral	Negative
Grossmont College	71%	29%	
MiraCosta College	65%	33%	
Palomar College	65%	33%	
San Diego City College	64%	32%	
San Diego Miramar College	64%	36%	
Cuyamaca College	56%	42%	
San Diego Mesa College	54%	46%	
San Diego College of…	50%	47%	
Southwestern College	49%	51%	
Imperial Valley College	42%	52%	

Legend:
- Positive
- Neutral
- Negative

Imperial County – Awareness

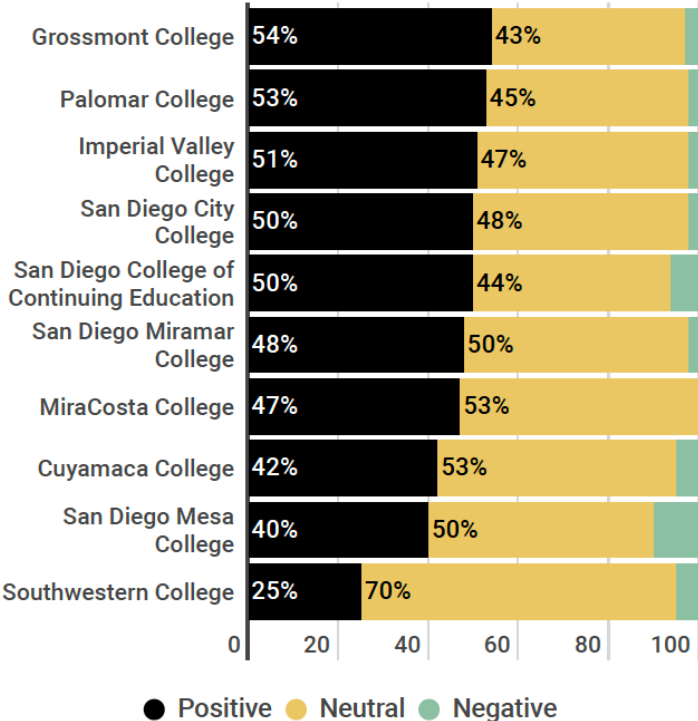| College	I'm familiar with this college	I know the name only	I'm not at all familiar with this college
San Diego College of Continuing Education	45%	32%	23%
San Diego City College	40%	53%	
Imperial Valley College	40%	51%	9%
San Diego Miramar College	40%	45%	15%
Palomar College	36%	45%	19%
Southwestern College	34%	51%	15%
Grossmont College	34%	45%	21%
MiraCosta College	32%	45%	23%
San Diego Mesa College	30%	60%	
Cuyamaca College	23%	58%	19%

● I'm familiar with this college ● I know the name only
● I'm not at all familiar with this college

Imperial County - Perception

College	Positive	Neutral
Grossmont College	54%	43%
Palomar College	53%	45%
Imperial Valley College	51%	47%
San Diego City College	50%	48%
San Diego College of Continuing Education	50%	44%
San Diego Miramar College	48%	50%
MiraCosta College	47%	53%
Cuyamaca College	42%	53%
San Diego Mesa College	40%	50%
Southwestern College	25%	70%

● Positive ● Neutral ● Negative

Respondents' media consumption data and graphics

Digital Media Consumption

MEDIA CONSUMPTION – DAILY OR WEEKLY [sorted by Prospective Students]	Prospective Students	Parents & Caretakers
Social media	93%	76%
Video streaming services (such as Netflix, Amazon Prime, etc.)	89%	93%
YouTube	89%	73%
Digital music services (such as Pandora, Spotify, etc.)	82%	62%
Digital TV services (such as Roku, Apple TV, etc.)	68%	64%
Digital gaming/games that may include ads	68%	41%
Broadcast or cable TV	49%	80%
Print media (magazines, newspaper, etc.)	33%	36%

Social Media Consumption

SOCIAL MEDIA CONSUMPTION – ONCE+ PER WEEK [sorted by Prospective Students]	Prospective Students	Parents & Caretakers
Facebook	35%	59%
Instagram	22%	4%
YouTube	17%	14%
Twitter	10%	4%
TikTok	6%	4%
Snapchat	4%	2%
LinkedIn	2%	5%
Reddit	2%	2%
Tumblr	0	2%
Other social media	1%	5%