



Proving Return on Education to Generation Z

March 19, 2019

Community College Executive Forum

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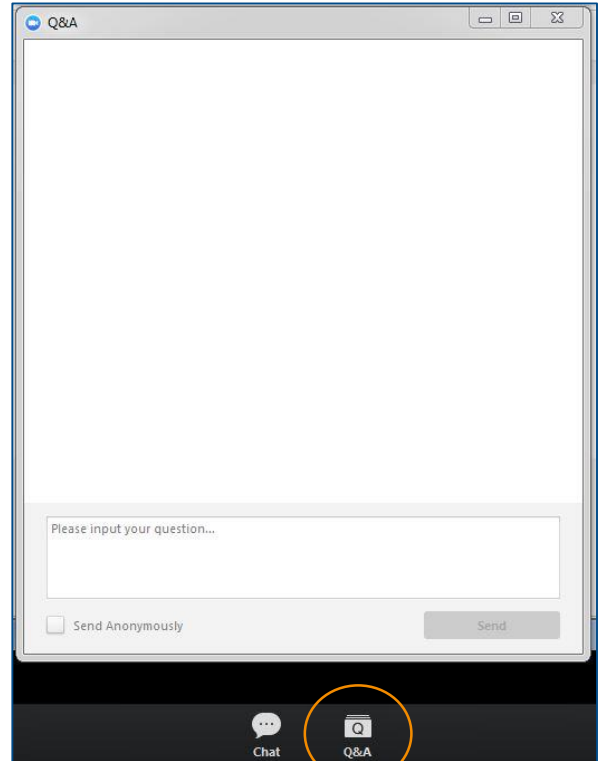


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To ask the presenter a question, navigate to the Q&A button at the bottom of your screen and type it into the Q&A Panel.

After the webinar, a member of our team will be in touch to follow-up on your questions individually.

Type your question here



Today's Presenter



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Member Services Team

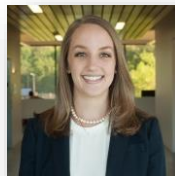


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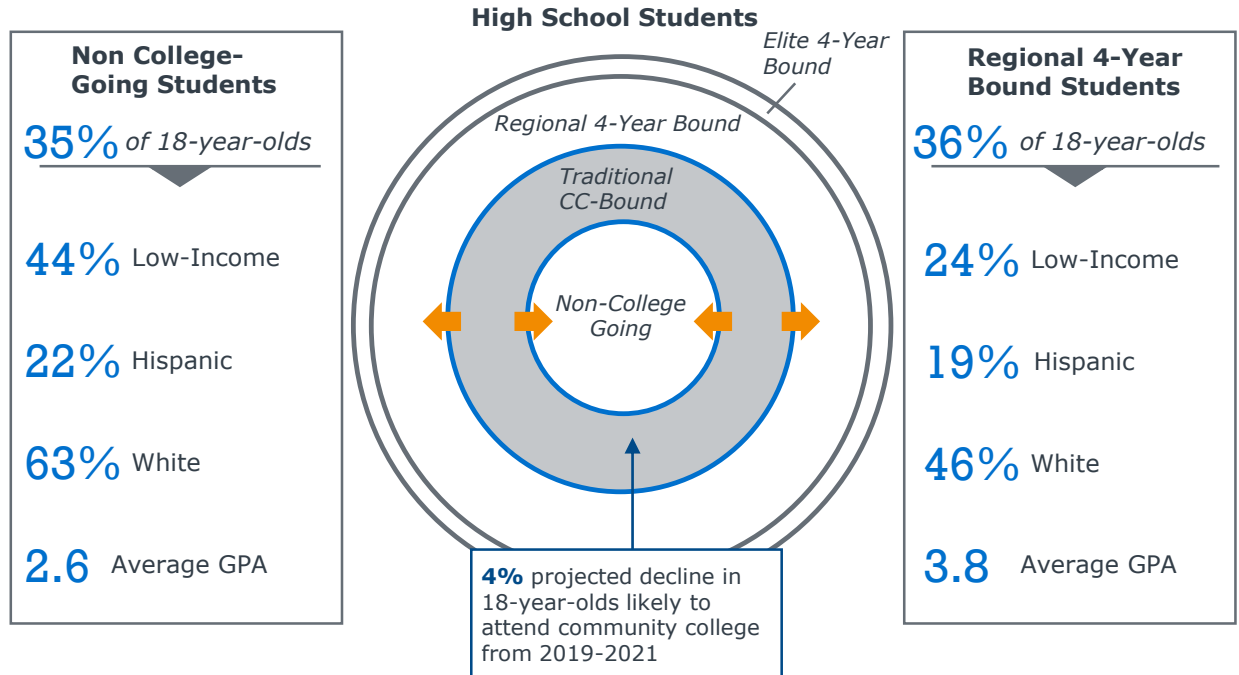
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Breaking Through the Core to Return to Growth

Marketing Outside of Typical (and Shrinking) Student Market

Capitalize on High School Relationship to Expand Gen Z Enrollments



Source: "Educational Longitudinal Study of 2002," National Center for Education Statistics; Nathan D. Grawe, *Demographics and the Demand for Higher Education*, (Baltimore: Johns Hopkins University Press, 2018); EAB interviews and analysis.

Changing Demographics, New Opportunities



	Non-College Bound HS	Four-Year Bound HS	Working Adults
Current Market Win Rate	23% of 2017 HS graduates enrolled in community college after graduation		10.4% of 25–34-year-olds in the labor force have an A.A.
Size of Opportunity Market	1.5 million 2018 HS graduates predicted to not enroll in college	1.4 million 2018 HS graduates predicted to enroll in a regional four-year	18.9 million 25–34-year-olds don't have a college degree
Opportunity Win Rate	5–7%	0.5–2%	1–3%
Size of Winnable Opportunity	106,000–152,000	7,200–29,000	189,000–568,000



Identifying the Opportunity in Your Backyard

New Enrollment Potential

Traditional-Aged Enrollment
Adult Enrollment

% of Traditional-Aged Increase
% of Adult Increase

[Traditional-Aged Not Enrolled](#)
[Adults Not Enrolled](#)

Traditional-Aged Opportunity Win Rate
Adult Opportunity Win Rate

New Traditional-Aged Enrollments
New Adult Enrollments

Sizing Your Potential Market



Meet with campus stakeholders to determine marketing capacity, likely enrollment increase



Use publicly available Census data to identify size of target population

Calculating Opportunity Win Rate

Target
Population
Enrollment



% Increase
Expected

Target Population Not Enrolled



% Opportunity
Win Rate



Bring It to Campus

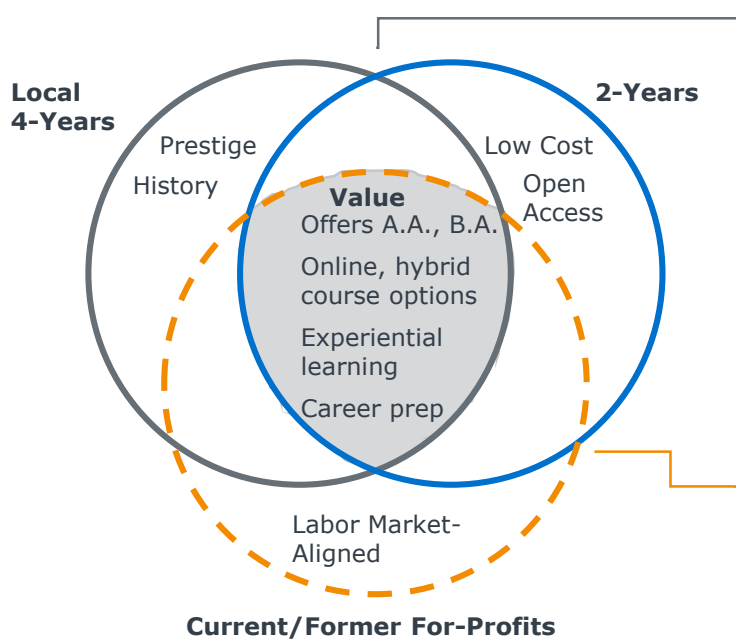
Use the Enrollment Calculator in the Appendix to determine marketing opportunity in your service area

Differentiation Difficult in a Crowded Market

Old Value Story No Longer Unique in Higher Education

Heightened Competition Due To Messaging...

Marketing Messages of Higher Ed Competitors



...And Service Overlap

System-Wide Consolidations



4-Years Offering Associates



For-Profits Become Non-Profits



Getting to Know—and Recruit—Gen Z

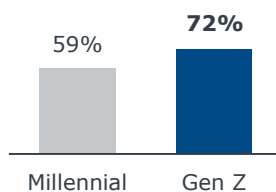


Meet Gen Z

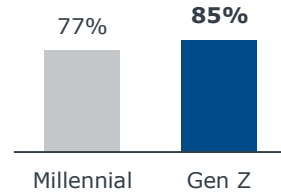
Generally recognized as the generation **born after 1996**

- Largest segment of the population (26%)
- 46% non-White
- Digital natives
- 40% of incoming college pipeline
- **Winnable Opportunity:** 113,00-181,000

They're Not Millennials...



Agree that community colleges **put students first...**



...and **prepare them to be successful**

...And They Know What They Want



"I'm **tired of fake marketing pitches**. I want to go somewhere where they know *me*."



"My parents don't want to just throw money around now, and I **don't want a lot of debt.**"



"A lot of people think **if you don't go to a big 'hot shot' university, your education is garbage**. It's not."

Market to Students Against Your Competition



Align Messages to Prospects' Needs to Win Enrollments



College vs. Workforce *Gen Z*

Grow the pool of prospective students by expanding access to academically qualified students



Size of Winnable Opportunity

106,000–152,000



College vs. University *Gen Z*

Create a new value narrative through targeting Gen Z college bound with signals of quality



Size of Winnable Opportunity

7,200–29,000



College vs. Current Job *Adult Students*

Reform programming to meet the needs of working adults



Size of Winnable Opportunity

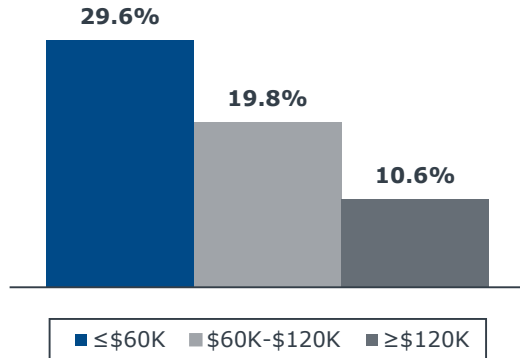
189,000–568,000

Community Colleges Losing Share to 4-Years

Crowded Market for Four-Year-Bound Students Hurts CC Enrollments

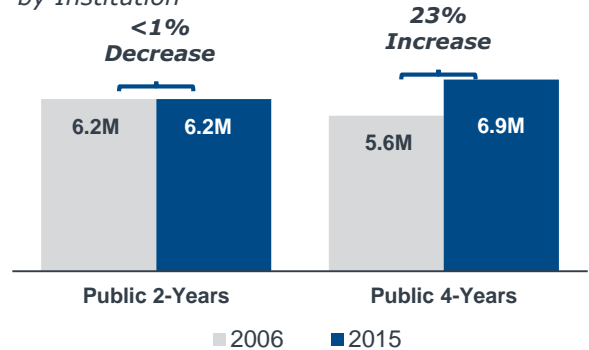
Inverse Relationship Between Income and Community College Consideration

Percentage of Surveyed Students Who Considered Community College, by Student Household Income¹



While CCs See Decline in Enrollments, Four-Years on the Rise

Total Undergraduate Fall Enrollment, by Institution



12%

Increase in number of federal Pell grant recipients at public 2-years

53%

Increase in number of federal Pell grant recipients at public 4-years

Source: Digest of Education Statistics, National Center for Education Statistics; Federal Pell Grant Program End-of-Year Report, 1981-82 through 2015-16, U.S. Department of Education; EAB interviews and analysis.

1) EAB Management Services 2015 Survey for New College Freshmen, n=4,761

Generation Z Brings New Challenges



Traits, Preferences of Today's Students Manifested in Lifestyles

Generational Traits



Generational Traits Ages (13-21)

Focus: Practical, Open, Connected

- **Tech driven** – Prone to unplug, yet hyper connected; expects smart, flexible tech
- **Digital natives**- Comfortable with technology at a very early age
- **Open to sharing** – Puts lives online without filter
- **Self-Educators** – Uses online media; has seen it all

Messaging Preferences

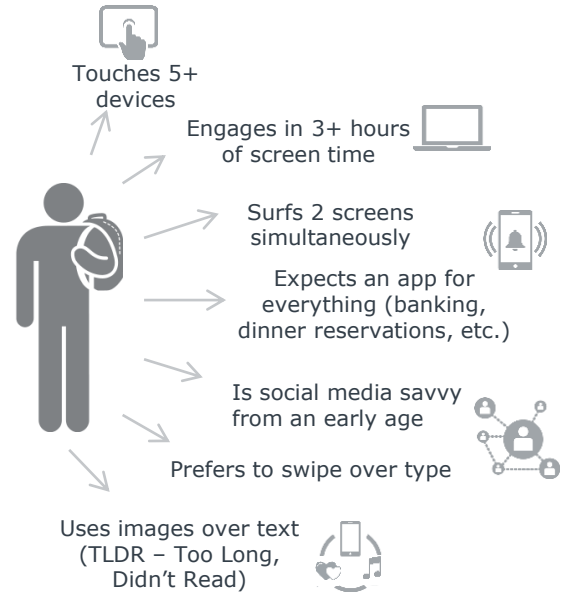


Marketing or Communication Preferences

Focus: Humanity, Collaboration, Sharing, Personal

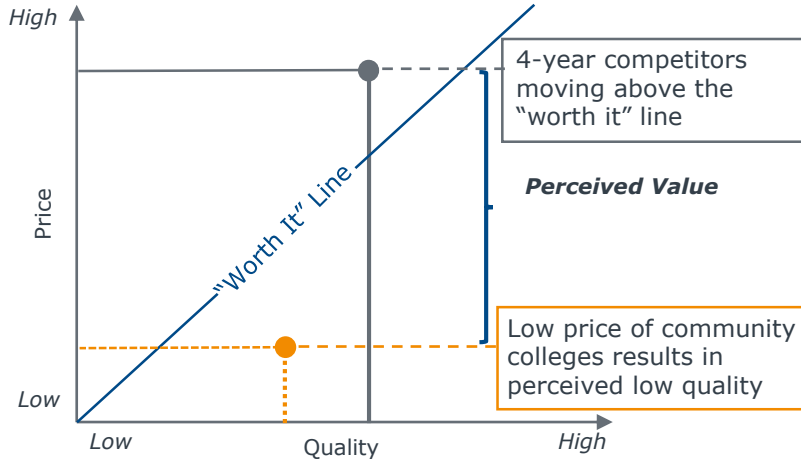
- **Expects authenticity** – Expects demonstrated commitments to worthy causes
- **Personalized** – Prefers customized content
- **Shared values** -Needs to establish common ground to build trust, loyalty
- **FOMO** (Fear of Missing Out) - Needs to be in the loop; driven to connection via social media

A Typical Day in the Life of a Gen Z'er



Value Not Based on Price Tag Alone

Both Price and Quality Key to Value Perception



Quality is Top-of-Mind for Gen Z Consumers...

57%

Of Gen Z says **quality** drives their attachment to a brand more than any other factor, **nearly 10% higher than any other generation**

...But College Quality is Obscured by Low Prices

For consumers for whom "quality" drives decision-making, **low prices often signal low quality.**

val·ue | noun | /'val-yū/

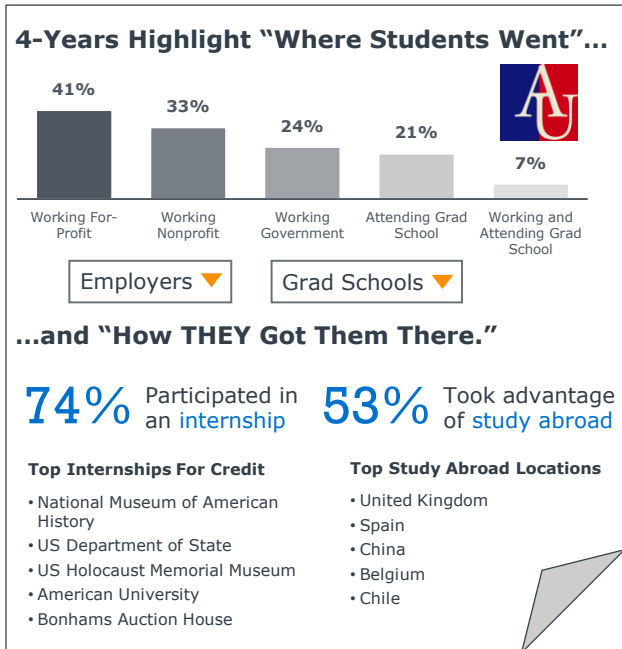
1 : Marginal benefit of the consumption of a good or service relative to its price¹



In an ROE¹ World, CCs Remain Fixed on Price

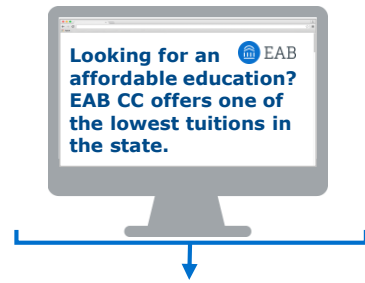
Four-Year Competitors Raise the Bar on Proving ROE

American University History Undergraduate Outcomes Digital Campaign



Yet Two-Years Default to One-Size-Fits-All Messaging on Price

Sample Community College Messaging as Seen on College Websites



“**Making Education Affordable**”

“**Cheaper Than Competitors**”

“**Cost-Effective**”

“**Low Price**”

“**Save Thousands of Dollars**”

“**More Affordable Than Ever**””

1) ROE: Return on Education

Recapture Market Share With Proof of ROE



How do we demonstrate quality to bolster perceptions of value?

Gen Z wants to see educational and experiential quality in their future college



Educate on College Quality in Addition to Affordability

- Demonstrate college value through experiential, student-centric college visits
- Differentiate in the market by playing to college strengths and aligning marketing to student outcomes



How do we deliver our message in a way that appeals to Gen Z?

Gen Z wants outreach to be targeted to their interests and goals



Utilize Student Data to Produce Personalized Outreach

- Target communications to appeal to prospects' career and transfer interests



How do we take advantage of Gen Z's fickle consumer behavior?

Gen Z are fickle consumers who will likely change their minds



Nudge Students Throughout the College Onboarding Process

- Maintain student mindshare through consistent summer outreach

Generic Community College Visits Overlook Quality of Student Experience

Campus Tours



"Lost in the Crowd"

Campus tours herd oversized groups through campus and remain undifferentiated by student interest or goals

Academic Fairs



"Not Connected to Career Interests"

Non-specific academic fairs often provide overwhelming amount of irrelevant information



Financial Workshops

"Intimated by the Process"

Financial aid workshops explain complex and high stress concepts in an obtuse, and often boring, way



Student Life Sessions

"Unaware of the Authentic Student Experience"

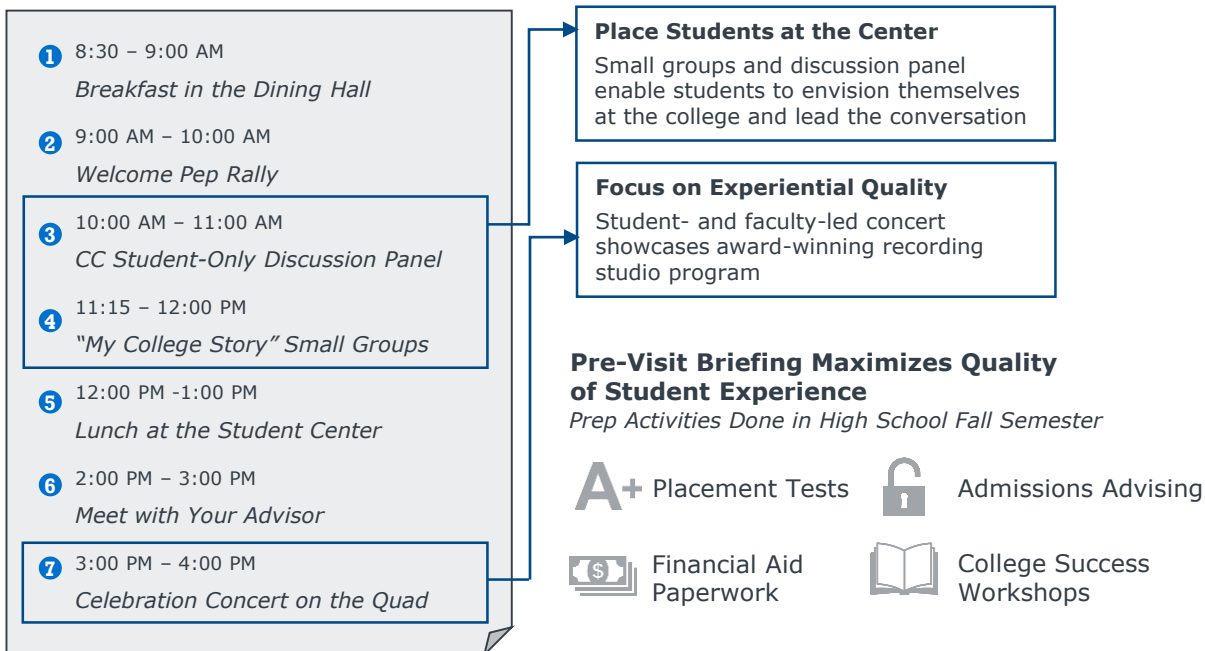
Stiff student life panels moderated by administrators rather than students focus on description over experience

Putting the “U” in Campus Tour

Experiential, Student-Centered Visits Draw Four-Year-Bound Students

High School Tour Focuses on Prospective Students’ Experience

Sample Campus Visit Agenda with Community College Differentiators



Compete on Quality in More Ways Than One

Additional Ways Your College Visits Can Differentiate from Four-Years'



Peer Interaction

Encourage Personal Social Engagement

Promote peer-to-peer networking and demonstrate student engagement in campus culture

Example Activities:

- ✓ Organized Peer Ice Breakers
- ✓ Student-Run Extra-Curricular Activities Fair



Career Development

Introduce Prospective Students to Alumni, Faculty

Provide opportunities for interaction with college alumni and instructors within students' fields of interest

Example Activities:

- ✓ Lunch with Alumni, Organized by Career Focus
- ✓ Program-Specific Faculty Meet and Greets



Educational Rigor

Promote Elite Academic Opportunities

Signal the quality of the college's education by highlighting opportunities also available at four-year universities

Example Activities:

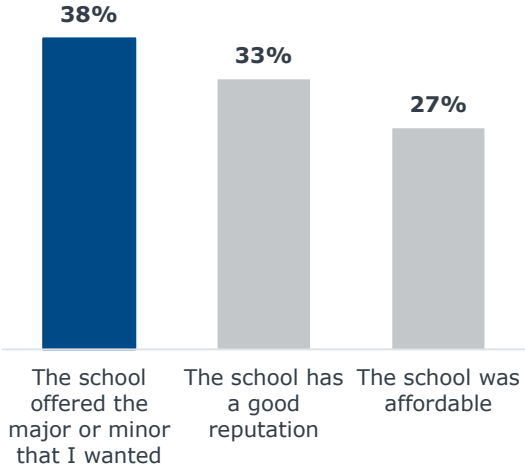
- ✓ Academic Pep Rally Celebrating Student Outcomes
- ✓ Introduction to Academic Honor Societies (e.g., Phi Theta Kappa) and Program-Specific Clubs
- ✓ Elite College-Admitted Student Ambassadors

Program Plays Critical Role in College Selection...

...But Undervalued as Community College Marketing Tool

Today's Students Increasingly Shopping on Program

Primary Reasons Students Report Enrolling in a Four-Year University¹



Yet College Programs Are Rarely Part of Marketing Experience

“We spent months evaluating and reworking our programs to meet transfer requirements and workforce demand...all for them to be buried on the website...You'd have to sit down with an advisor to really see and understand the work we did.”

*Vice President of Instruction,
West Coast Community College*

1) EAB Management Services 2015 Survey for New College Freshmen, n=4,761

Market Transfer and Career Pathways to Students



Middlesex Differentiates Quality Message Through Student Goal Alignment

College Works with HS Counselors...

Guidance and Academic Advising Retreat

Who: Middlesex administration and faculty mentors meet with district high school counselors and high school dual enrollment instructors

What: Training on transfer and career outcomes; best practices to inform students of the college pathways that can help achieve their long-term goals

Where: On-campus at Middlesex

When: Annually (state of Massachusetts requires mandatory guidance counselor training)

...To Help Students Make Decisions with Their End Goals In Mind

1 Existing Transfer Pathways and Articulation Agreements

MCC teaches counselors all transfer pathways in MA, highlighting articulation agreement with Northeastern University, among others



2 Targeted Career Programming for Local School Demands

Counselors prepare Naviance reports on their students' interests before session, allowing MCC to emphasize maps most relevant to each counselor

Middlesex Differentiation Cuts Through Noise in Crowded Market

> 100

Not-for-profit higher education institutions in the state of Massachusetts

\$100

MCC cost per high school counselor and DE instructor in attendance

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Personalize Marketing to Engage Generation Z

Take a Page Out of the Four-Year Playbook

EAB Resources to Guide Your Targeted and Differentiated Approach to Gen Z Engagement



EAB

Personalization
at Scale

Enrollment
Management Forum

- ✓ Secure Campus Buy-In for Change
- ✓ Kick Start “How You Sell” vs. “What You Sell” Differentiation
- ✓ Capture Gen Z Insight via Digitization
- ✓ Audit and Revise Current Outbound Student Communications
- ✓ Empower 1st Gen Parents to Boost College Enrollment



EAB

Integrated Prospect
Communication Plan
Toolkit

Enrollment
Management Forum

Best Practices Research to Improve Yield Management for Generation Z, First Generation, and Beyond

Research-Backed Tools to Differentiate Your Institution by Implementing a Campus-Wide Integrated Communication Plan

Want to Know What Students Want? Ask Them.

Interest Survey Provides Critical Student Information for Recruitment

Dual Enrolled Students Complete Interest Survey at Registration...

Leading Indicators Generated by Student Survey



Career Aspirations



Transfer Interests

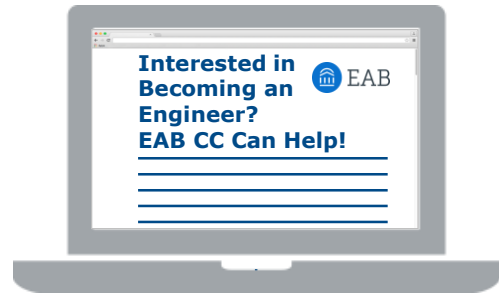


Extracurricular Involvement



Desire to Attend a 2-Year College

...Informing Personalized College Outreach Strategy



Sophomore/Junior Year of HS

Junior Year

Senior Year

HS Graduation/College Matriculation

Student expresses interest in taking dual enrollment, meets with guidance counselor

Student registers for dual enrollment

Student Takes Dual Enrollment Class

College sends personalized marketing outreach

Tailored Outreach Puts CC Quality at Forefront

Matching to Student Interest Helps CC Compete With Four-Year Offerings Survey Data Used to Populate Personalized Outreach

Interested in Becoming an Engineer? We Can Help! EAB

Congratulations on beginning your journey with EAB CC through dual enrollment. While we are sure that ENG 101 will be a great foundation for any career, we were excited to see that you're interested in engineering, and wanted to point you the following materials and resources.

- Our engineering department won the 2016 EAB hackathon
- We offer engineering summer interest camps
- Take a look at our transfer agreements with State U

Signed,
Jerry
Engineering Department Head

Connect community college to dual enrollment

Emphasize college quality in a meaningful way

Include internship and career-specific opportunities that match student's interests articulated in survey

Provide departmental contact information to add personal touch and introduce student to faculty member

Sitting on a Gold Mine of Data

Take Advantage of Multiple Data Assets to Reduce Marketing Costs

A Wealth of Prospect Information Readily Available to Colleges

Common Sources of Free Student Data

- ✓ Dual enrollment students
- ✓ Online inquiry form
- ✓ Call center inquiries
- ✓ High school seniors
- ✓ Recruitment events

- ✓ **AP/SAT test-takers**

College Board Resource Provides Free Access to 100,000 Student Names

- High school seniors who took one or more College Board test but **whose names have not been purchased by a 4-year university**
- Available at no-cost from May 1st—August 31st

Lead Generation Process Made Easier and More Affordable

Cost of Generating Cold Leads Versus Using Existing Warm Leads

\$0.43

Typical cost of buying a single student name from College Board

\$26

Average cost per click for nursing program online advertisements

\$0.00

Cost to cultivate warm leads using current dual enrollment students and other existing data sets



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Nudge Students Throughout the College Onboarding Process

- Maintain student mindshare through consistent summer outreach

Lack of Loyalty Creates New Kind of Summer Melt



Gen Z Students Likely to Shift Between Brands

76% Of Gen Z only give brands two to three chances before they stop shopping them

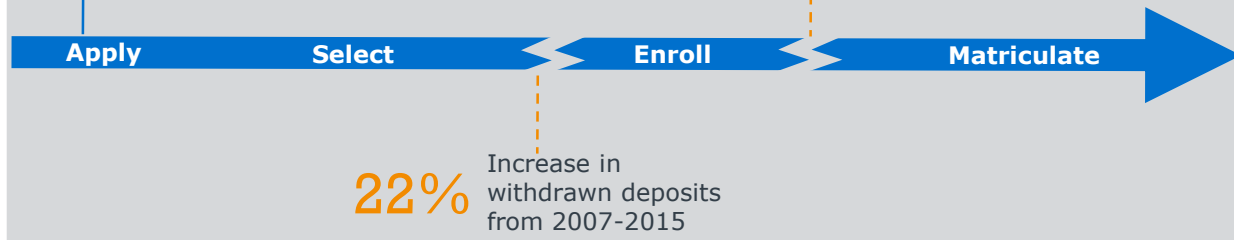
81% Of Gen Z are willing to switch from their favorite brand if they find a similar product at higher quality

Inclination of Gen Z to “Shop Around” Increases Risk of Summer Melt

Enrollment Funnel as Affected by Gen Z Comparison Shopping

108% Increased applications from 2001–2014 with just an 11.6% increase in prospects

10-40% Of college enrollees ‘melt’ during the summer (e.g., fail to matriculate after accepting admission)



Source: “[Brands Must Show Loyalty To Earn Loyalty, According To Alliance Data’s New Consumer Study](#),” [The Rules Of NextGen Loyalty](#),” Alliance Data, 19 March 2018; “[The Next Generation of Retail](#),” Interactions Marketing, 12 July 2016; [Summer Melt Handbook](#), Strategic Data Project, Harvard University; EAB interviews and analysis.

Nudging Students Keeps Your College Top-of-Mind



Text Message Campaigns Deliver Timely Reminders

Overview of Text Message Nudging Process



Collect Student Information

- Counselor records
- Flyers with phone number students can text for assistance
- Student surveys



Create Message Templates and Schedule

- Key nudging milestones:
 - Application deadlines
 - Financial aid deadlines
 - Enrollment deposit
 - Orientation
 - Placement tests
 - Course registration



Deliver Messages and Provide Support

- One FTE at the Minnesota Office of Higher Education supports 2,000+ students
 - About 10 hours per week spent answering messages

Prominent Text Messaging Vendors



Key Principles of Successful Messaging Campaigns



Short, Relevant Content Aligns With Student Communication Preferences

Tips for Engaging Students With Text Messages



Personalization

Include relevant student information and the counselor/advisor's name, especially in the first message.



Opt-Out

Let students know that they always have the option to text back STOP or CANCEL to stop receiving messages.



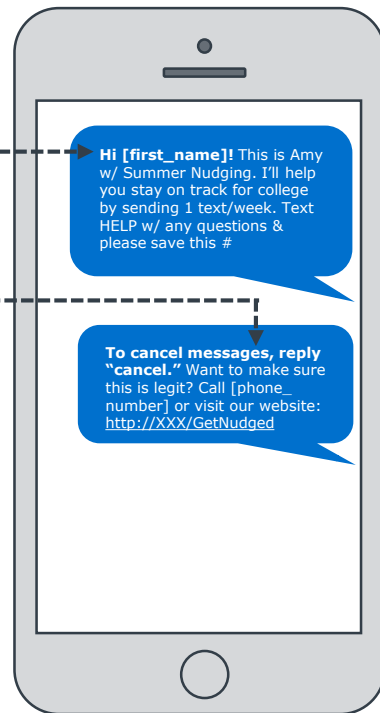
Less is More

Keep messages short—distilling content down to its main point ensures students can digest information quickly.



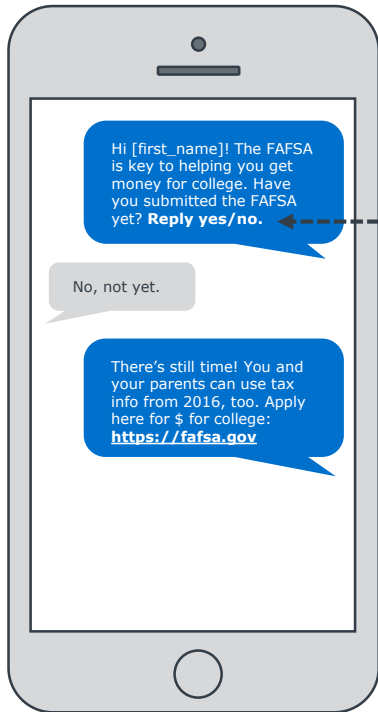
Frequency

The recommended number of prescheduled or programmed messages is 2-5 per month.



Key Principles... (Cont.)

Actionable, Just-in-Time Messages Increase Likelihood of Step Completion



Tips for Engaging Students With Text Messages



Call to Action

Include a short link to a resource or have the student respond to a simple yes/no question about their progress.



Urgency

When possible, create urgency by including dates and sending messages about 3 days prior to deadlines.



Interactive

Staff should monitor and reply to messages the hour after a programmed message is sent.



Prepared Responses

Prepare responses to common or anticipated questions in advance to avoid duplicative or inconsistent work.



Full list of tips available in the Appendix.

More Students Complete Critical Process Steps



Impact of Text Message Nudging Campaigns on College Enrollment

Houston ISD

12-16% Increase in completed applications compared to students who did not receive text messages

San Jose USD

22% Increase in completed financial aid applications for students receiving reminders through their phones

Dallas ISD

4-5% Increase in likelihood of college enrollment for FRL¹ students receiving text messages

uAspire

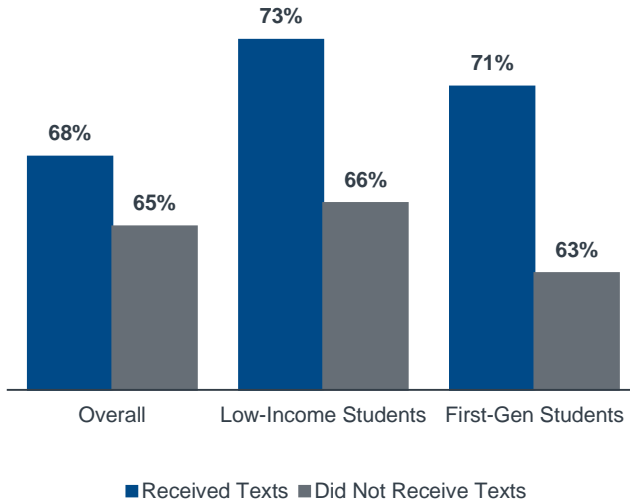
7% Increase in college enrollment for students receiving text messages compared to those who did not

1) Free or reduced price lunch.

Increase Enrollment With a Small Investment

Text Message Nudges Linked to Increased College Enrollments

Percentage of Students Enrolling in College



Benefits of Focusing Efforts on Text Message Campaign



- Low-cost, \$5-\$10 per student
- Easily scalable solution
- Accessible access through technology likely to capture students' attention
- Immediate message delivery maximizes efficiency
- Key enrollment and onboarding reminders sent just-in-time

Upcoming Spring 2019 Webconferences



33

CCEF's Marketing and Enrollment Series



[Moving from Open Access to Equal Access](#)

Guidance on how colleges can provide an equitable enrollment experience to all students, regardless of their educational preparedness or socioeconomic background.

Thursday, February 14

*1:00 p.m. – 2:00 p.m.
Eastern Time*



[Proving Return on Education to Generation Z](#)

Exploring practices on how the 2-year space can differentiate itself and market return-on-education to Generation Z.

Tuesday, March 19

*1:00 p.m. – 2:00 p.m.
Eastern Time*



[Redesign College Programming to Meet the Needs of Adult Students](#)

Innovative strategies that colleges have used to reduce enrollment opportunity cost, including PLA, compressed terms, and dual modality.

Tuesday, April 16

*1:00 p.m. – 2:00 p.m.
Eastern Time*



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