

APPROACH AND METHODOLOGY

XYZ Community College (XYZCC) hired Sandra Golden & Associates to design, conduct, and analyze a community perception study for the college. For this study, Direct Opinions of Beachwood, Ohio – working for SGA – conducted in April/May, 400 telephone interviews with the general public in XYZCC’s service area. The phone numbers were selected at random from zip codes provided by XYZCC. Lawrence Golden, Executive Vice-President and Director of Research for Sandra Golden & Associates, provided leadership and primary analysis for this project.

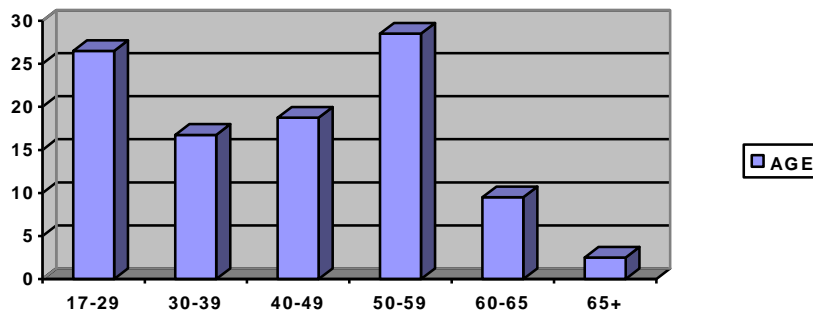
The survey interviewed individuals between the ages of 17 and 65.

The sample size and methodology achieved a confidence level of 95% +/- 4.56 %.

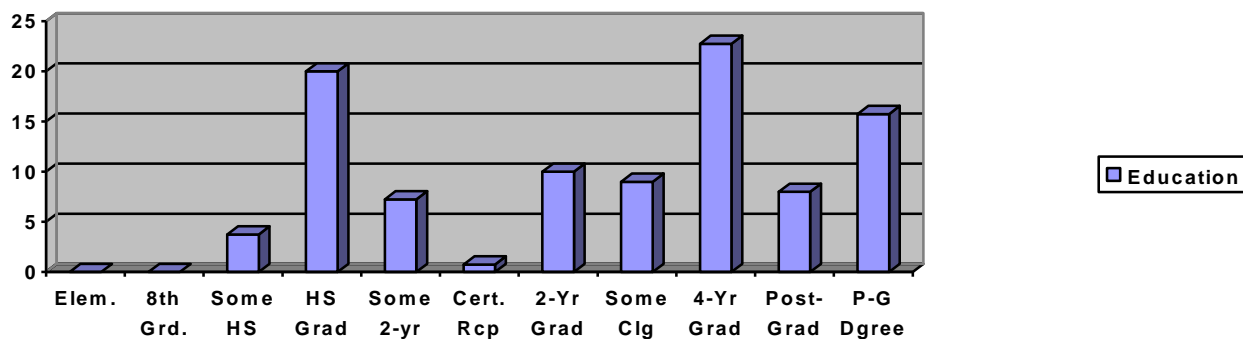
Demographics

The survey was cross-tabulated and then analyzed by several demographic factors including age, income level, gender, education, employment, and occupation. Marketing implications from these cross-tabs will be indicated in the appropriate sections. It is important to note initially, however, that in many of the sub-categories of the cross-tabs, the low number of people in the sub-group makes the sample not statistically significant. We will still make some marketing comments, however, since these sub-groups can be treated in the same manner as “focus groups” and can provide some very useful direction.

The age distribution of the survey can be seen in the graph below. The largest segment, 50-59, containing 28.50% of the total sample was closely followed by the 17-29 segment with 26.50%. (One important note on this cross-tab – 20% of those in each of the 25-29 age segment, 40-49 age segment, and 50-59 age segment indicated an increased likelihood of taking classes in the next few years.)

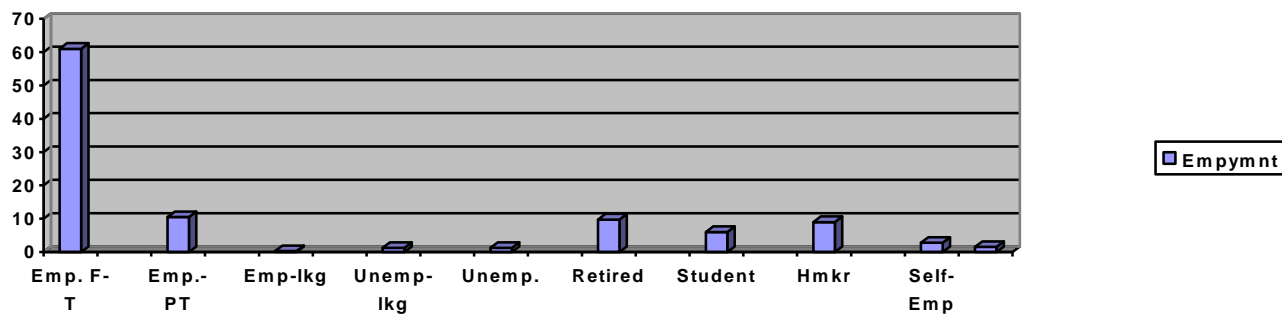


The sample was fairly well educated. 73.50% of the sample population had taken some college classes, including 10% who had an associate degree. The largest single segment (22.75%) was the group that had a bachelor's degree followed by 20% who were high school graduates.

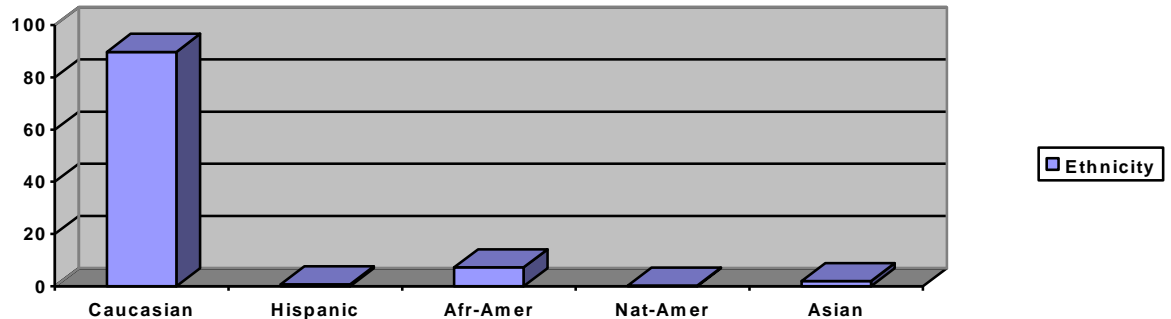


By far, the largest segment of the respondent population was employed full-time (61.00%). That was followed by those who were employed part-time (10.50%). Overall employment is seen in the following chart.

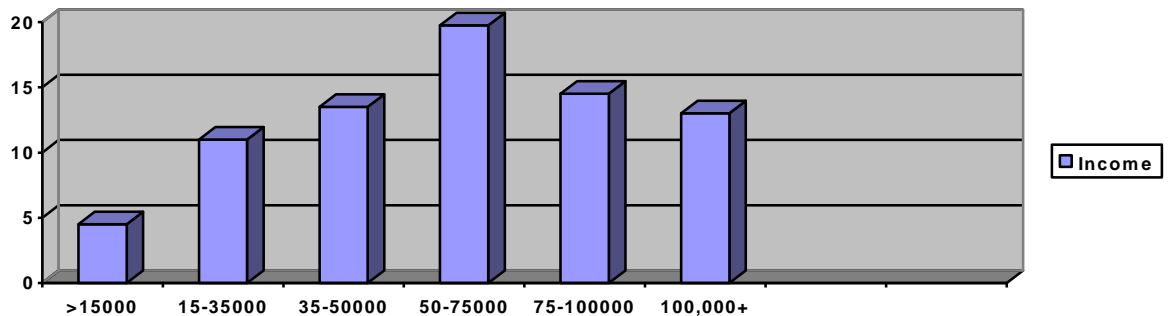
(lkg = looking for other employment)



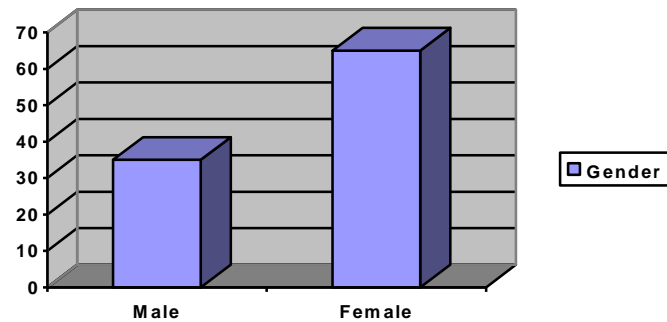
The respondents were primarily Caucasian (89.75%). In fact, only 3 Hispanics and 29 African-Americans were randomly selected to be part of the survey. No respondents refused to answer this question. As such, there will be little reference to ethnic cross-tabs, as these cross-tabs would not have any statistical significance. In order to gain an understanding of these groups, the college would need to over-sample or do focus groups within these segments. Having said this, however, we may occasionally point out some differences between the races. When that is done, the figures should be treated as focus groups – i.e. interesting and potentially useful, but not statistically valid.



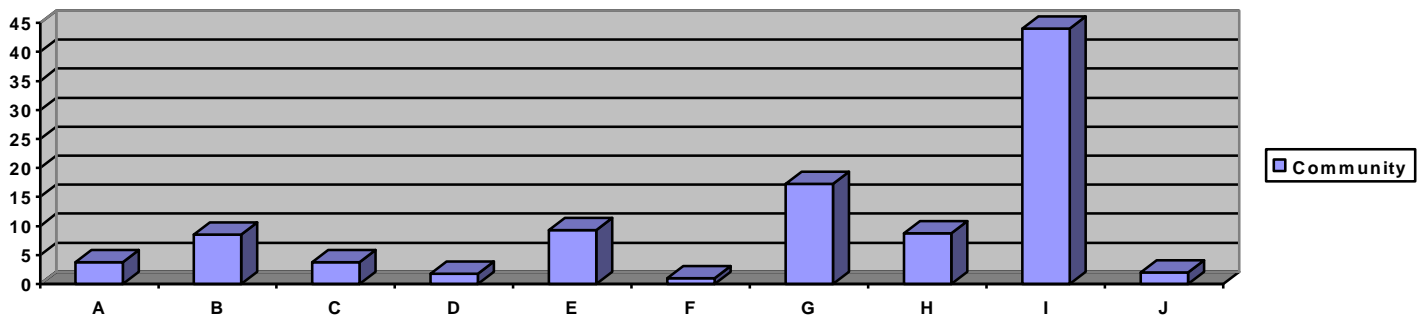
Income ranges are shown below in the bell shaped graph. The figures are for the 76.25% of respondents who answered this question – a fairly typical percentage for this type of survey.



More women answered the survey than men by 65% versus 35%.



The breakdown of the respondents by community is shown in the graph below.



Since our telemarketing firm provides as many cross-tabulations as requested at no additional charge to the client, we ran and analyzed some cross-tabs which we felt might be of interest, although they will either be only occasionally referred to or not referred to at all in the primary analysis of the survey since there were no significant variations within them. They may be found in their entirety in the attached reports. Furthermore, the totals at the top of the pages in these cross-tabs may not total 400, as some respondents may have refused to answer the specific question, for example. In other cases the respondents may have given more than one answer so the total may exceed 400. Finally, the Appendices at the end of the main data report contain many comments that are interesting to review. Where appropriate, they have been incorporated into the body of the report.

Marketing Implications

Throughout the report we will be providing our insight into the marketing implications from the data gathered. These Marketing Implications will be highlighted and italicized to be easily identified; e.g. *Marketing Implications*.

SURVEY OBJECTIVES

1. To identify interest levels and attitudes about XYZ Community College, providing a baseline for measuring marketing efforts.
2. To identify awareness of XYZ Community College and its programs and how people are made aware of the college.
3. To identify those factors that are important to individuals when considering a higher education experience.
4. To identify the benefits sought and expected from XYZ Community College by key target audiences.

EXECUTIVE HIGHLIGHTS

These highlights are meant to provide a cursory overview of the survey and are, obviously, not the complete picture of the survey results and implications. We strongly recommend that the entire report be reviewed.

1. We would characterize the overall awareness for XYZCC as fairly good, but could be improved. It is not unusual for the community college in a city to place behind a major university, but in this case there are two universities that placed ahead of XYZCC.
2. The top-of-mind awareness for XYZCC is stronger than that of any of the other two-year colleges in the area. 38 out of the 400 respondents (9.50%) had not heard of the college.
3. We believe that with additional promotion, public relations, and personal contacts the overall awareness of the college can be significantly increased. We also believe that this may mean spending additional dollars on the overall marketing effort.
4. If the respondent had attended XYZCC (or a member of their family had done so) the top-of-mind awareness given two chances increased to 39.49%. Even if the respondents had just attended an event at the college the top-of-mind awareness increased to 34.77%.
5. Top-of-mind awareness was exactly the same (25%) for men and women.
6. We would never recommend that XYZCC cut back on promoting the facts that it is “low cost” (we prefer the term value) and “convenient.” What we do suggest, however, is that the college also promote the other factors that are important. A “Top 10” list is helpful in this regard, as are testimonials from students and employers.
7. Among those who indicated some likelihood of taking classes in the near future (“3,” “4,” or “5”), 71.60% of them thought that personal attention in the classroom was important or very important compared to 61.75% for the total sample.
8. Of the 400 respondents, 179 (44.75%) recalled seeing any advertising for a two- or four-year college in the area. This is, when compared with most of the other studies that we have done, a slightly lower percentage.
9. When asked to name which college advertising they saw 48.04% named XYZCC, 39.66% named some other college, and 14.53% were unsure of which college’s advertising they had seen.
10. While it is important to note that XYZCC advertising was recalled more than any other college, we must remember that the majority of the respondents (55.25%) did not recall

- any advertising and only 108 respondents recalled XYZCC advertising (27%) even when they were asked specifically if they had seen some.
11. It is clear . . . that the respondents overwhelmingly preferred getting information about a college through the mail. It is also important to note that the second most preferred medium was the Internet, closely followed by newspapers.
 12. Having said this, it is our opinion that the college needs to use more direct mail, whether it is the schedule or postcards or some other marketing materials. (The audit also talked about the effectiveness of quality, targeted letters to interested individuals.) We believe and increased use of direct mail can help to improve the top-of-mind awareness of the college as well as increase the overall familiarity and image of the college (discussed in more detail below).
 13. While over half the respondents indicated that there was little or no likelihood of their taking classes in the near future, almost 30% said that this was a possibility and another 12.50% said they might be taking some classes. This is a good response and indicates to us that increased marketing efforts such as advertising, personal contacts, etc. will have an effect on enrollment.
 14. Those who had attended were much more likely to have seen the advertising in the newspaper – probably the schedule book – by 52.38% versus 28.89%.
 15. 51.88% of the 17-29 age segment said that they were likely or very likely to do so – 45.28% were very likely. This compares to 29.75% for the sample as a whole. This indicates that the 17-29 age segment is an important segment to target for the college's marketing.
 16. The college should examine its evening offerings and not only consider additional classes where feasible, but promote the availability of entire degrees at night – for those for which that is true.
 17. Clearly Monday through Friday classes are most preferred, although some Saturday programming seems feasible.
 18. Almost 30% of the respondents indicated a preference for short-term classes (6-9 weeks). This is a significant percentage and the college should examine opportunities to offer these types of classes.
 19. It is important to note that in the vast majority of the respondents' households there is a computer and that most of these computers have high-speed access to the Internet.
 20. Over half the respondents indicated interest – or the possibility of interest – in online courses. The college should obviously then examine its programming to see where additional online courses may be appropriate.

21. The 17-29 age segment was much more interested in morning classes (between 8 am and 1 pm) than the total sample by 59.43% versus 36% and they were also more interested in afternoon classes by 24.53% versus 12.75%.
22. The segment more likely to take classes in the next few years was significantly more interested in evening classes than was the total sample by 82.25% versus 55.50%. They were also much more interested in Monday through Friday programming by 82.84% versus 54.25%. Finally, this segment was much more interested in online programming than was the sample as a whole by 53.49% “yes” versus 38.70%.
23. This indicates, again, that XYZCC should re-examine and promote its M-F evening offerings – particularly if an entire degree can be obtained through evening classes and that the same is true of its online offerings.
24. Only 31% of the respondents indicated that they were “familiar” or “very familiar” with XYZCC.
25. The two most important factors associated with community colleges, cost of tuition and convenience of location, are also associated with XYZCC. Perhaps more important, however, is the fact that 28.50% of the respondents associated quality of instruction with XYZ, while only 1.75% associated that factor with community colleges.
26. This indicates to us that the quality of teaching at the college is something to be proud of and should be mentioned in college promotions. It is also why we recommend that the college talk of value – quality at a low cost – rather than just low cost.
27. It is interesting that although no respondents thought of evening classes when thinking about community colleges in general, 17.50% associated them with XYZCC.
28. While virtually none of the respondents thought of the college in a bad way, it is important to note that the largest category was those who rated the image of the college a “3.” We believe that this neutral rating is really saying we don’t know enough about you to say bad or good things.
29. Familiarity with the college increased from 22.86% for those who had not attended an event at the college to 68.05% for those who had attended an event.
30. Those who indicated that they were somewhat to very familiar with the college associated quality of instruction with the college much more than the sample as a whole by 44.84% versus 28.50%.
31. Out of the total sample of 400, 157 (39.25%) attended the college – or a member of their immediate family had done so.

32. The association of quality of instruction with the college increased from 12.76% for those who had not attended the college to 52.87% for those who had. This is a strong indication of the quality of teaching at XYZCC and the faculty should be justly proud of this association. The key is to make the community aware of this quality.
33. Once they [the target constituents] get to know the college, they like the college. It should be pointed out that increase in positive image is almost entirely from the neutral (“3”) rating. This is true even if they had just attended an event at the college rather than take classes at the college.
34. Given these results we believe that it is important to get people in the service area onto the campus – even it is for non-academic activities. We would encourage community events such as health fairs, holiday events, cultural events, and other public relations activities and person-to-person contacts to bring people to the campus.
35. It is important to note that a substantial portion of the two important age segments do not read newspapers. This fact coupled with the high preference for direct mail is a good reason to do major promotion through the mail.
36. 31.36% of those likely to take classes in the next few years watched cable TV versus 41.50% for the total sample. This, again, indicates to us the importance of reaching out through direct mail.

GENERAL SURVEY RESULTS

TOP OF MIND AWARENESS

We would characterize the overall awareness for XYZCC as fairly good, but could be improved. It is not unusual for the community college in a city to place behind a major university, but in this case there are two universities that placed ahead of XYZCC. There is no question that the notoriety surrounding the shootings at Virginia Tech affected the awareness figures for that college, but not as much as one might think. 43.77% of those respondents surveyed *before* the shootings named Virginia Tech given two opportunities. That would still place it well ahead of XYZCC in top-of-mind awareness. (The percentage increased to 50.04% after the shootings.) While the top-of-mind awareness for XYZCC is stronger than that of any of the other two-year colleges in the area, Exhibits I and II show this clearly, 38 out of the 400 respondents (9.50%) had not heard of the college.

EXHIBIT I: Unaided Awareness – All Colleges (in percent)

College	1 st Time	2 nd Time*	Total% **
XYZ CC	11.50	15.25	25.00
ABC University	5.00	3.11	7.75
DEF CC	4.25	3.95	7.75
GHI College	3.75	2.26	5.75
JKL University	4.75	11.02	14.50
MNOUniversity	5.25	2.54	7.50
PQR University	5.25	16.95	20.25
STU College	18.75	12.71	30.00
VWX Tech	29.00	19.21	46.00

* Percent of remaining who did not mention XYZCC the first time.

**No other college totaled 5% in two tries.

**EXHIBIT II: Unaided Awareness –
Comparisons With Other Two-Year Colleges
(asked of individuals who had not yet named the college
given two opportunities)**

<u>College</u>	<u>Total%</u>
XYZ CC	53.67
DEF CC	14.00
KLM CC	5.67
RTU CC	5.00
DKG CC	2.67

We believe that with additional promotion, public relations, and personal contacts the overall awareness of the college can be significantly increased. We also believe that this may mean spending additional dollars on the overall marketing effort.

By Cross-tabs

If the respondent had attended XYZCC (or a member of their family had done so) the top-of-mind awareness given two chances increased to 39.49%, however, this was still slightly below JHF (45.22%) and KRV (43.31%). Of these people who had not yet named XYZCC, 91.58% of those remaining named the college when asked to name a two-year college.

Even if the respondents had just attended an event at the college the top-of-mind awareness increased to 34.77%.

Overall top-of-mind awareness was somewhat higher in the Big City area (33.52%) than for the total sample. Only 4 people out of 176 (2.27%) in Big City had not heard of XYZCC.

Top-of-mind awareness was exactly the same (25%) for men and women.

FACTORS CONSIDERED WHEN SELECTING A COLLEGE

A word or two of explanation is required for Exhibit III as it combines a variety of information from several different questions. The column headed "Importance" ranks the percentage of people who identified the specific factor as either "Important" or "Very Important" (values of 4 and 5) in the overall survey when asked "How Important Are These Factors in Selecting a College." The question was aided; i.e. each factor was identified and the respondent was asked to rate it. After planting the possible choices of factors in the respondents' minds through this question, the respondent were then asked *unaided* (the choices were not read) why someone might choose a community college. The percentages in the first column do not relate directly to the percentages in the next column as one is aided and the other is unaided. The overall comparisons, however, do show what the respondents feel are the main reasons that people attend community colleges.

**EXHIBIT III: Importance of Factors vs.
Why People Choose CCs
(factor rating of 4 or 5*)**

FACTOR	AIDED IMPORTANCE*	UNAIDED CCs
Quality of instruction	94.75	1.75
Transferability of credits	87.00	20.25
Flexible scheduling	86.50	15.50
Cost of tuition	84.75	60.00
Reputation	83.00	0.00
Wide range of courses	79.50	2.00
Specific courses of study	75.50	6.75
Courses for a job/promotion	70.50	5.25
Availability of financial aid	65.00	4.25
Convenience of location - home	62.75	36.25
Personal attention-registering, etc.	62.75	1.75
Personal attention-classroom	61.75	2.25
Offers day care services	27.75	0.25
Availability of continuing ed. Classes	-n.a.-	18.50
Offers credits towards a degree	-n.a.-	8.25
Improve academic preparation	-n.a.-	18.50
Ease of entry	-n.a.-	6.75
Unsure of goals	-n.a.-	20.75
Graduate more quickly than at 4-year school	-n.a.-	8.25

*Percentage ranking factor as either "Very Important" or "Important"
-n.a.- = "not asked" of respondents

When the first column in Exhibit III is examined it is obvious that the things that people want if they were to apply to a college are, in fact, available at community college. Unfortunately, column two shows that most people are unaware of that fact. Community colleges have done a great job in selling "low cost" and "convenience" and that is shown in this survey as well.

We would never recommend that XYZCC cut back on promoting the facts that it is "low cost" (we prefer the term value) and "convenient." What we do suggest, however, is that the college also

promote the other factors that are important. A “Top 10” list is helpful in this regard, as are testimonials from students and employers.

When examining Exhibit IV one must realize that some of the factors (e.g. the first three) may very well be true (although the “greater pay” depends on the majors) and the college can’t do anything about them. Other factors (e.g. “prestige” and “low-end education” are perceptions and can be changed with effective promotion.

EXHIBIT IV: Why People Don't Choose CCs (in percent)	
<u>FACTOR</u>	<u>IMPORTANCE</u>
4-year degree means greater pay	32.75
Doesn't offer courses needed	26.25
Want to go away from home	25.75
4-year colleges are more prestigious	17.25
Image of “low end” education	15.25
Want dorm/social life	11.00
Courses won't transfer	7.25

By Cross-tabs

Convenience was somewhat more important as a selection factor for the 17-29 year old segment than for the total sample by 73.59% “4” and “5” versus 62.75% for the total sample.

Among those who indicated some likelihood of taking classes in the near future (“3,” “4,” or “5”), 71.60% of them thought that personal attention in the classroom was important or very important compared to 61.75% for the total sample.

Convenience was more important to women than men by 69.61% versus 50.00%. This was also true for wide range of courses and programs (83.46% versus 72.14%), personal attention in registering, etc. (66.15% versus 56.43%), flexible scheduling (91.93% versus 76.42%), and availability of childcare (as one might expect) (34.23% versus 15.71%).

ADVERTISING RECALL

Of the 400 respondents, 179 (44.75%) recalled seeing any advertising for a two- or four-year college in the area. This is, when compared with most of the other studies that we have done, a slightly lower percentage.

When asked to name which college advertising they saw 48.04% named XYZCC, 39.66% named some other college, and 14.53% were unsure of which college's advertising they had seen. Of the other colleges named (see Table 17 in the data), DKC was named most with just 7.26%.

While it is important to note that XYZCC advertising was recalled more than any other college, we must remember that the majority of the respondents (55.25%) did not recall any advertising and only 108 respondents recalled XYZCC advertising (27%) even when they were asked specifically if they had seen some.

Exhibit V shows where the 108 respondents who saw XYZCC advertising actually saw the advertising. The television percentage is somewhat high, given that the college does very little TV advertising. We have seen this, however, frequently. People tend to associate other college advertising for a college with which they are more familiar. Other colleges in the area do advertise on TV.

The high percentage for newspapers is most likely due to the fact that the schedule is distributed through the papers. Respondents may be recalling some the direct mail postcard promotions the college used and there is no doubt that the billboards the college uses have had an impact. (We rarely see the billboard percentage this high.)

EXHIBIT V: Where XYZCC Advertising Was Seen

<u>Medium</u>	<u>%</u>
Television	44.44
Newspaper	42.59
Mail	22.22
Billboards	17.59
Radio	13.89
Class schedule/school catalogue	4.63
Internet	3.70
Movie theater	2.78
Leaflets/brochures	1.85
Magazine	0.00

Asked of the 108 who recalled seeing XYZCC advertising.

The messages that were recalled are shown in Exhibit VI.

EXHIBIT VI: Specific Messages*

<u>Message</u>	<u>%</u>
Quality, affordable relevant education	21.30
Convenience	17.59
Many programs to choose from	17.59
Transfer to 4-year college	14.81
Low cost	12.96
Get job/career started	6.48
Earn degree/take courses online	6.48

*% for those who recalled a message.

It is clear from Exhibit VII that the respondents overwhelmingly preferred getting information about a college through the mail. It is also important to note that the second most preferred medium was the Internet, closely followed by newspapers. (We don't always see the Internet that strong.)

Having said this, it is our opinion that the college needs to use more direct mail, whether it is the schedule or postcards or some other marketing materials. (The audit also talked about the effectiveness of quality, targeted letters to interested individuals.) We believe an increased use of direct mail can help to improve the top-of-mind awareness of the college as well as increase the overall familiarity and image of the college (discussed in more detail below).

EXHIBIT VII: How They Would Like to Get Information

Medium	%
Mail	67.75
Internet	24.50
Newspaper	23.25
Television	11.25
Radio	4.00
Leaflets/brochures	1.75
Bus signs/billboards	1.25
Magazine	0.75
Class schedule/school catalogue	0.50
Movie theater	0.00

While over half the respondents indicated that there was little or no likelihood of their taking classes in the near future, almost 30% said that this was a possibility and another 12.50% said they might be taking some classes. This is a good response and indicates to us that increased marketing efforts such as advertising, personal contacts, etc. will have an effect on enrollment.

**EXHIBIT VIII: Likelihood of
Taking Classes**

<u>Rating</u>	<u>%</u>
“1” (Very Unlikely)	48.75
“2” (Unlikely)	9.00
“3” (Maybe)	12.50
“4” (Likely)	9.25
“5” (Very Likely)	20.50

By Cross-tab

Those respondents who had taken classes at the college – or a member of their family had done so – were much more likely to recall XYZCC advertising than those who had not taken classes by 70.13% versus 31.37%. Those who had attended were much more likely to have seen the advertising in the newspaper – probably the schedule book – by 52.38% versus 28.89%. Those who had attended were more likely to recall every ad message shown in Exhibit VI than those who had not. And they were more likely to recall the transfer message by 22.22% versus 4.44% – although these last two percentages are not statistically significant.

Even if the respondent had just attended an event, their recall of college advertising in general (56.94% versus 42.07%) and XYZCC advertising in particular (70.73% versus 41.30%) increased.

Although not statistically significant because of the small sub-sample size, respondents in the 17-29 age segment were less likely to have seen XYZCC advertising in the newspapers (30.43% versus 42.59% for the total sample) and more likely to have heard an ad on the radio (26.09% versus 13.89%). They were also much more likely to have seen a billboard by 39.13% (a very high percentage for billboards) versus 17.59% for the total sample. Regarding the question of likelihood of taking classes in the next few years, and this response is statistically significant, 51.88% of the 17-29 age segment said that they were likely or very likely to do so – 45.28% were very likely. This compares to 29.75% for the sample as a whole.

This indicates that the 17-29 age segment is an important segment to target for the college's marketing.

The segment that indicated some likelihood of taking classes in the next few years (“3,” “4,” or “5”) was somewhat more likely to recall college advertising by 52.66% versus 44.75% for the sample as a whole. More importantly, this segment was somewhat more interested in receiving information about a college through the mail than was the total sample by 73.37% versus 67.75%

and also more somewhat more interested in receiving that information via the Internet by 31.36% versus 24.50%.

The segment of the sample from the Big City area was somewhat more aware of college advertising in general (50.57% versus 44.75%) and XYZCC advertising in particular (58.43% versus 48.04%).

Women were more likely to have seen a XYZCC ad (schedule) in the newspaper than men by 49.28% versus 30.77%. They were also more likely to take classes in the next few years by 46.54% versus 34.28%.

CLASS TIMINGS, SCHEDULING

Although respondents could give more than one answer to preferred class times (hence the percentages total more than 100%), several things are clear with regard to this issue. First of all, evening classes are particularly attractive to a significant portion of the market. Secondly, afternoon classes are the least popular time slots. However, a significant percentage of the respondents indicated that morning and lunch hour classes were of interest.

The college should examine its evening offerings and not only consider additional classes where feasible, but promote the availability of entire degrees at night – for those for which that is true.

EXHIBIT IX: Preferred Class Times*

Time	%
Before 8 a.m.	1.75
Between 8 a.m. & 11 a.m.	19.75
Between 11 a.m. & 1 p.m.	16.25
Between 1 p.m. & 5 p.m.	12.75
Between 5 p.m. & 8 p.m.	37.75
Between 8 p.m. & 11 p.m.	17.75

*For those expressing a preference; respondents could give more than one response so total exceeds 100%.

Clearly Monday through Friday classes are most preferred, although some Saturday programming seems feasible.

EXHIBIT X: Preferred Class Days

<u>Days</u>	<u>%</u>
Monday – Friday	54.25
Saturday	14.00
Sunday	4.50

Almost 30% of the respondents indicated a preference for short-term classes (6-9 weeks). This is a significant percentage and the college should examine opportunities to offer these types of classes. They also have the advantage of possibly catching those students who either forgot or never got around to registering for classes at the start of the semester as well as those who started in a course, but dropped it for a variety of reasons a few weeks into the semester.

EXHIBIT XI: Preferred Class Length*

<u>Time Frame</u>	<u>%</u>
2-3 week courses	8.76
6-9 week courses	29.03
Semester (15 week)	41.01
No preference/Not sure	18.89

*For those expressing a preference

It is important to note that in the vast majority of the respondents' households there is a computer and that most of these computers have high-speed access to the Internet.

EXHIBIT XII: Do You Own A Computer

Course Interest	%
Yes	89.50
No	10.25
Not Sure/Maybe	0.25

EXHIBIT XIII: Do You Have High Speed Internet?

Course Interest	%*
Yes	79.39
No	18.66
Not Sure/Maybe	1.95

*Asked only of those who had a computer.

Over half the respondents indicated interest – or the possibility of interest – in online courses. The college should obviously then examine its programming to see where additional online courses may be appropriate.

EXHIBIT XIV: Interest in Online Courses	
<u>Course Interest</u>	<u>%</u>
Yes	38.70
No	45.89
Not Sure/Maybe	15.41

By Cross-tabs

The 17-29 age segment was much more interested in morning classes (between 8 am and 1 pm) than the total sample by 59.43% versus 36% and they were also more interested in afternoon classes by 24.53% versus 12.75%. The 17-29 year olds were also more interested in online courses with 61.34% “yes” or “maybe” versus 54.11% for the total sample.

The segment more likely to take classes in the next few years (“3,” “4,” “5”) was significantly more interested in evening classes than was the total sample by 82.25% versus 55.50%. They were also much more interested in Monday through Friday programming by 82.84% versus 54.25%. Finally, this segment was much more interested in online programming than was the sample as a whole by 53.49% “yes” versus 38.70%.

This indicates, again, that XYZCC should re-examine and promote its M-F evening offerings – particularly if an entire degree can be obtained through evening classes and that the same is true of its online offerings.

Women were more interested than men in taking online classes by 42.25% “yes” versus 32.38%.

COLLEGE IMAGE

What They Think About XYZCC

Only 31% of the respondents indicated that they were “familiar” or “very familiar” with XYZCC. We believe that with additional marketing efforts – as discussed above – this percentage can be increased.

EXHIBIT XV: Familiarity With XYZCC	
Rating	%
“1” (Very Unfamiliar)	28.50
“2” (Unfamiliar)	15.75
“3” (Neutral)	24.75
“4” (Familiar)	14.00
“5” (Very Familiar)	17.00

One of the first things to notice in Exhibit XVI is that the two most important factors associated with community colleges, cost of tuition and convenience of location, are also associated with XYZCC. Perhaps more important, however, is the fact that 28.50% of the respondents associated quality of instruction with XYZ. While only 1.75% associated that factor with community colleges, it was the most important factor when respondents were asked the importance of various factors in the college decision (Exhibit III). This indicates to us that the quality of teaching at the college is something to be proud of and should be mentioned in college promotions. It is also why we recommend that the college talk of value – quality at a low cost – rather than just low cost. Finally, it is interesting that although no respondents thought of evening classes when thinking about community colleges in general, 17.50% associated them with XYZCC. Given the time preference of evening classes (Exhibit IX) this is important to continue.

EXHIBIT XVI: Why People Choose CCs & What's Recalled About XYZCC

FACTOR	UNAIDED CCs	RECALL XYZCC
Quality of instruction	1.75	28.50
Transferability of credits	20.25	15.75
Flexible scheduling	15.50	8.25
Cost of tuition	60.00	22.75
Reputation	0.00	4.50
Wide range of courses	2.00	8.25
Specific courses of study	6.75	3.25
Courses for a job/promotion	5.25	11.00
Availability of financial aid	4.25	4.25
Convenience of location – home/work	36.25	40.00
Personal attention-registering, etc.	1.75	1.50
Personal attention-classroom	2.25	1.00
Offers day care services	0.25	1.50
Availability of continuing ed. classes	18.50	0.75
Availability of evening classes	0.00	17.50
Availability of online classes	0.00	7.75
Offers credits towards a degree	8.25	9.00
Improve academic preparation	18.50	0.00
Ease of entry	6.75	0.75

Overall Image

While virtually none of the respondents thought of the college in a bad way, as seen in Exhibit XVII, it is important to note that the largest category was those who rated the image of the college a “3.” We believe that this neutral rating is really saying we don’t know enough about you to say bad or good things. While it is good that the majority (50.75%) thought of XYZCC in a positive or very positive way, we believe that figure can improve – and more will be said about this shortly.

EXHIBIT XVII: Overall Image	
Rating	%
“1” (Very Bad)	0.00
“2” (Bad)	0.75
“3” (Neutral)	48.50
“4” (Positive)	26.50
“5” (Very Positive)	24.25

By Cross-tab

Familiarity with the college increased from 22.86% for those who had not attended an event at the college to 68.05% for those who had attended an event. (More will be mentioned about this shortly.)

The younger age segment (17-29) rated the college image slightly lower (44.34% versus 50.75%), but the drop was into the neutral rating (“3”) and not the negative ratings. As this is an important segment of the college’s target market, it is important to reach out to this segment to increase their knowledge about what XYZCC has to offer.

Those respondents from the Big City area were, as one would expect, more familiar with the college than the sample as a whole by 42.62% “4” or “5” versus 31.00%. The Big City segment was more likely to associate quality of instruction with the college than the total sample by 39.20% versus 28.50%. Their neutral (“3”) ranking of the college image was down compared to the total sample (31.25% versus 48.50%) and their positive rankings (“4” and “5”) were higher (68.18% versus 50.75%). Again, the better they know the college, the more they like the college.

Those who indicated that they were somewhat to very familiar with the college (“3,” “4,” or “5”) associated quality of instruction with the college much more than the sample as a whole by 44.84% versus 28.50%. Their overall image of the college was also higher by 76.23% “4” or “5” versus 50.75% for the sample as a whole. Once again, the better they know the college, the more they like the college.

Although the income sub-segments are not statistically significant it is interesting to note that with regard to the overall college image, the neutral (“3”) rating basically decreased as income increased and the positive image increased as income increased. This may indicate that additional work needs to be done with the lower income segments of the target market.

ATTENDED XYZCC

Out of the total sample of 400, 157 (39.25%) attended the college – or a member of their immediate family had done so. Why they were attending is shown in Exhibit XV.

EXHIBIT XVIII: Why They Were Attending	
<u>Reason</u>	<u>%</u>
Working towards a degree	41.40
Improve skills in the workplace	23.57
To transfer to another college	21.66
Personal interest	7.01
Working towards a certificate	3.82

As one would expect, familiarity increased substantially if the respondent or a member of his or her family had attended XYZCC. Over 71% said they were familiar or very familiar compared to just under 5% for those who had not attended.

The most important factor that we notice in Exhibit XIX is that the association of quality of instruction with the college increased from 12.76% for those who had not attended the college to 52.87% for those who had. This is a strong indication of the quality of teaching at XYZCC and the faculty should be justly proud of this association. The key is to make the community aware of this quality.

Almost 1/3 (32.48%) of the respondents who had attended the college associated cost with the college. While this is significantly higher than those who had not attended (16.46%), we believe that it can be higher – particularly when the association of quality of instruction with cost (value) is made.

Convenience was strongly associated with the college by those who had attended by 51.59% versus 28.40% for those who had not. Finally transfer of credits and credits towards a degree – two hallmarks of community colleges – are also fairly well associated with XYZCC.

**EXHIBIT XIX: Why People Choose CCs,
What's Recalled About XYZCC, and Attended XYZCC**

FACTOR	UNAIDED CCs	RECALL XYZCC	ATTENDED XYZCC
Quality of instruction	1.75	28.50	52.87
Transferability of credits	20.25	15.75	22.29
Flexible scheduling	15.50	8.25	10.83
Cost of tuition	60.00	22.75	32.48
Reputation	0.00	4.50	0.00
Wide range of courses	2.00	8.25	12.10
Specific courses of study	6.75	3.25	4.46
Courses for a job/promotion	5.25	11.00	15.28
Availability of financial aid	4.25	4.25	3.82
Convenience of location – home/work	36.25	40.00	56.69
Personal attention-registering, etc.	1.75	1.50	3.18
Personal attention-classroom	2.25	1.00	2.55
Offers day care services	0.25	1.50	0.64
Availability of continuing ed. classes	18.50	0.75	0.00
Availability of evening classes	0.00	17.50	17.83
Availability of online classes	0.00	7.75	5.73
Offers credits towards a degree	8.25	9.00	19.11
Improve academic preparation	18.50	0.00	0.00
Ease of entry	6.75	0.75	1.27

Exhibit XX clearly shows that once they get to know the college, they like the college. It should be pointed out that increase in positive image is almost entirely from the neutral (“3”) rating. This is true even if they had just attended an event at the college rather than take classes at the college.

EXHIBIT XX: Overall Image and Taken Classes or Attended an Event			
Evaluation	Total	ATTENDED	
		Classes	Event
Very Bad (1)	0.00	0.00	0.00
Bad (2)	0.75	0.64	1.39
Neutral (3)	48.50	11.46	18.06
Positive (4)	26.50	40.76	23.61
Very Positive (5)	24.25	47.13	56.94

Given these results we believe that it is important to get people in the service area onto the campus – even it is for non-academic activities. We would encourage community events such as health fairs, holiday events, cultural events, and other public relations activities and person-to-person contacts to bring people to the campus.

By Cross-tab

We should point out that only 28 of the 169 (16.57%) of those with a likelihood of taking classes in the next few years (“3,” “4,” or “5”) have attended an event at the college. It is, again, important to get the target community onto the college campus through a variety of events.

57.95% of those in the Big City area had attended the college versus 39.25% for the total sample.

MEDIA USAGE

The media information is presented below. In some cases there seems to be differences between the age groupings and the genders for several of the stations and we would encourage the college to look at this data as well as the data provided by the stations themselves in targeting their promotion.

EXHIBIT XXI: TOP PREFERENCES – RADIO STATIONS BY %

<u>FM Station</u>	<u>Group</u>	<u>Age</u>		<u>Gender</u>	
		<u>17-29</u>	<u>30-39</u>	<u>Men</u>	<u>Women</u>
92.3	13.50	22.64	20.90	11.43	14.62
93.5	5.50	4.72	2.99	2.14	7.31
94.9	13.00	12.26	14.93	10.71	14.23
96.3	5.75	7.55	7.46	8.57	4.23
99.1	16.25	9.43	19.40	7.14	21.15
99.9	5.00	3.77	5.97	11.43	1.54
104.9	2.50	1.89	2.99	3.57	1.92
106.1	2.00	6.60	1.49	0.71	2.69
107.9	1.25	1.89	1.49	0.00	1.92
SIRIUS SAT.	5.25	3.77	4.48	7.14	4.23
NPR	3.75	2.83	1.49	5.00	3.08
Don't listen to radio	11.00	8.49	7.46	12.14	10.38

In examining Exhibit XXII, it is important to note that a substantial portion of the two important age segments do not read newspapers. This fact coupled with the high preference for direct mail (Exhibit VII) is a good reason to do major promotion through the mail.

EXHIBIT XXII: NEWSPAPERS BY %

Papers	Group	Age		Gender	
		17-29	30-39	Men	Women
LYV Bulletin	1.32	1.01	2.99	0.74	1.65
UBT Bsns. Jrnl.	0.00	0.00	0.00	0.00	0.00
RKF	0.53	0.00	0.00	0.74	0.41
EPC Herald	1.32	1.01	0.00	0.74	1.65
IBW News Post	1.32	2.02	1.49	1.47	1.23
XOP News	3.69	3.03	1.49	4.41	3.29
WKD Record	0.00	0.00	0.00	0.00	0.00
QPC Journal	0.26	0.00	0.00	0.00	0.41
XID Times	59.37	54.55	50.75	58.82	59.67
IKL Tribune	1.32	1.01	1.49	2.21	0.82
YCT Times	0.26	0.00	0.00	0.00	0.41
YCE	0.53	0.00	0.00	0.00	0.82
USA Today	5.28	2.02	8.96	5.15	5.35
WPF Messenger	0.00	0.00	0.00	0.00	0.00
Wall Street Journal	2.64	3.03	2.99	3.68	2.06
Don't read a newspaper	23.22	28.28	26.87	24.26	22.63

In addition to the figures given below in Exhibit XXIII, we noticed that 31.36% of those likely to take classes in the next few years watched cable TV versus 41.50% for the total sample. This, again, indicates to us the importance of reaching out through direct mail.

EXHIBIT XXIII: TOP PREFERENCES – TV STATIONS BY %					
FM Station	Group	Age		Gender	
		17-29	30-39	Men	Women
Cable/Satellite	41.50	34.91	41.79	47.86	38.08
CW	0.00	0.00	0.00	0.00	0.00
Fox	7.00	8.49	4.48	9.29	5.77
WEVT 7	20.50	17.92	20.90	15.00	23.46
WOYV 13	8.50	6.60	7.46	4.29	10.77
WWMX 10	17.50	16.98	17.91	13.57	19.62
NBC	2.00	4.72	1.49	0.71	2.69
CBS	1.25	0.94	0.00	0.71	1.54
PBS	1.00	0.94	0.00	0.71	1.15
Don't watch TV	14.00	16.98	16.42	15.00	13.46