



Blackboard®



COMMUNITY COLLEGES
OF LOS ANGELES

Market Research

Phase 2

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Objectives

Understand the **diverse competitive landscape** and relevant **trends in LA metro area**

Identify & profile **top competitors based on size and overlap** of media and programs

Analyze existing CCLA marketing performance & activity to **identify areas for optimization**

Provide **actionable insights and recommendations** to ensure success



Market Landscape



National Community College Trends

A strong economy, increasing competition from other providers, and shifting demographics have contributed to significant declines in Community College enrollment since the Great Recession.



There was a 11.4% **drop in enrollment for community colleges** between 2013 and 2017



Historically, community college market share within higher ed has hovered around 40% to 44%, peaking during recessions and declining in between. Since 2002, the community college **market share has slipped to 38%—the lowest in three decades**



84% of community college admissions directors said they had seen enrollment declines in the last two years. And **55% of them reported that they were spending more on marketing** to attract students in the years ahead.



Nationally, the high school- & college-age populations are slightly down. A further 4% **drop in the traditional-aged enrollment pipeline is projected in the future**



The space is becoming more **crowded and competitive** with four-year institutions, online providers, trade schools, for-profits and non-traditional providers seeking the same students that community colleges traditionally serve

California Community College Trends

California is also experiencing declines in community college enrollment along with a shifting, more diverse population to serve.

There are many initiatives throughout the state to improve postsecondary accessibility and outcomes, including a transfer pathway partnership between the UC system and CCC system.



California has the largest community college system in the U.S. and is currently **experiencing 20-year low in enrollment**, down by 13% since 2013



This is driven largely because of the strong economy, **growing competition**, and **declining population** of high school graduates



Another reason for the decline could be that the **current fee price at state community colleges is much higher** now than it was a decade ago. Currently it is \$46 per academic unit versus \$26-per-unit fee charged in 2008



55% of students enrolled in California community colleges are minorities. Hispanics are the second largest group attending California community colleges, making up 28% of total enrollment



As the result of a 2018 MOU between the University of California system and the community college system, six institutions in the University of California system currently offer guaranteed admission for qualified community college students, **improving the pathway for students to transfer**

Shifting Demographics

The population and demographic shifts happening at the national and local stage mean shifting student needs and preferences.



Community colleges serve a large proportion of minority, first-generation, low-income, and adult students. These students **enroll at higher rates in community colleges** than 4-year universities.



While the **pool of postsecondary students has been shrinking** in recent years, the demographics are also shifting to adult and non-traditional learners, for whom part-time and **distance learning is often appealing**.



Enrollment of white students is declining, while rising for other demographic groups. **Hispanic enrollment has seen the greatest gains** in recent years.



Enrollment of full-time students is declining at a faster rate than part-time students. **84% of Hispanic students and 81% of black students enroll part-time** for at least one term, as compared to 72% of white students.



Today, about half of all bachelor's degree earners **began their education at a community college**

COVID-19 Implications

While COVID-19 continues to plague the nation, students' plans are changing or remain uncertain. While the circumstances may deter some students, they might attract others.

There are many projections of what might unfold, but it remains too soon to tell what the ultimate impact on higher education will be as a result of this ongoing pandemic.

40M

Nearly **40 million Americans** have filed for unemployment benefits since the beginning of the pandemic. April marked the largest one-month blow to the U.S. labor market on record. CA Governor predicts the **unemployment rate in the state could soar above 25%**



Different surveys report between 30-50% of Americans having lost their job or income reduced due to COVID-19; **more than half of Americans are worried about losing their job**



Historically, when the **economy is bad, enrollment at community colleges tends to boom** with displaced workers looking to earn a degree or pick up a new trade



As the pandemic continues, high school graduates may forgo their expensive four-year college this fall **in favor of a semester or two at an inexpensive two-year college**

10%

According to a survey, 1 out of 10 students who planned to go to a residential four-year college before the pandemic have changed their plans. **Nearly half now planning to attend a community college, and about a third plan to enroll in an online college**



Another report found that 1/3 of working adults think they would **need additional education and training to get a comparable job** and 2/3 think **more education is essential** in times of economic uncertainty.

Competitive Landscape



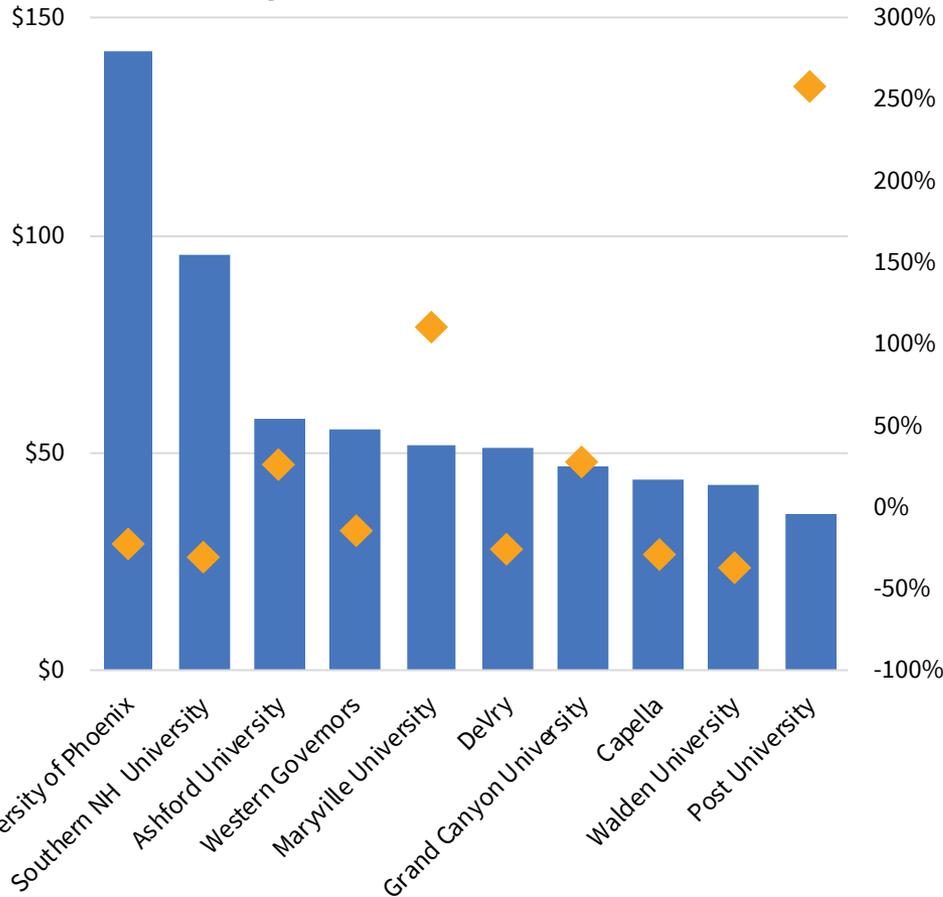
Competitive Methodology



- Identified (7) competitors to profile based on the following variables:
 - Advertising spend
 - Media performance
 - Enrollment & completion data
 - Program and award level overlap
 - Diversity in school type
- Analysis covers:
 - Media spend by channel
 - Tuition cost
 - Positioning
 - Lead nurture
 - SEO

Increasing Media Spend in Higher Education

Top 10 Institutions by Media Spend in Millions & YOY Growth



\$2B

Advertising in Higher Education is a **\$2B industry**

14%

Total media spend is up year-over-year, at a growing pace. It was up 6% from 2017-18 and 6.5% from 2018-19

67%

Digital is a large—and growing percentage—of total media budget. In 2019, **67% of national media spend in Higher Ed was in digital**—up from 52% in 2015

1/2

Paid internet search is the individual channel most heavily invested in—nearly **50% of total ad budget**

Los Angeles is a Top Media Market in the US

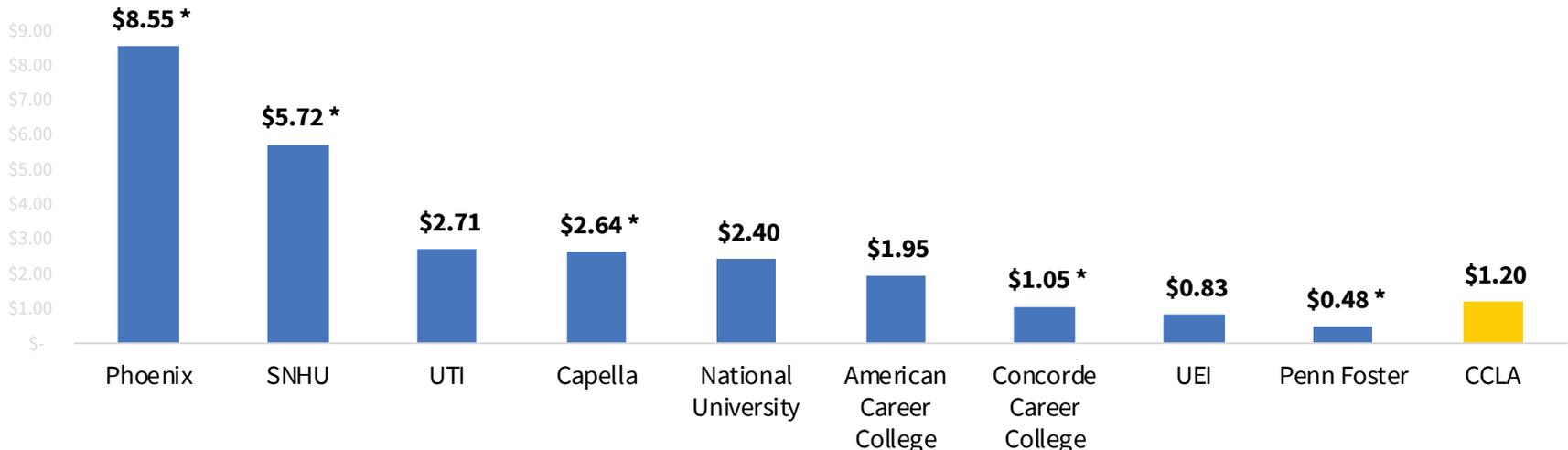
The LA metro area is the second highest in the nation for marketing spend:

- LA is the second-largest media market in the country, following New York City.
- Approximately 6% of all traditional national media spend goes to the LA market (NYC is 7%).

LA institutions are spending millions annually on media :

- The top 10 education advertisers in LA, that directly compete with CCLA, spend over \$25M annually.
- The top 5 that directly compete with CCLA, spend an average of nearly \$4.5M per year.

LA Market, Media Spend in Millions

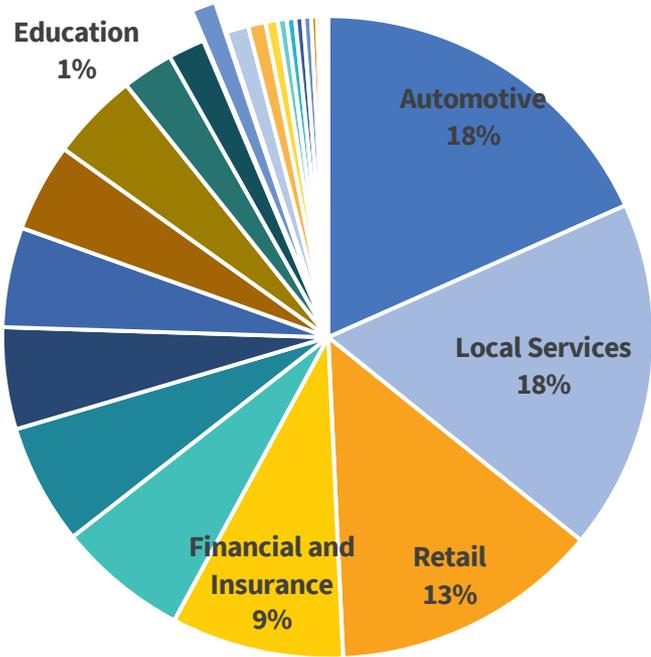


Source: Kantar Media, Spyfu

*NOTE: Estimated based on 6% national media average for LA

Crowded & Noisy LA Media Market

LA Media Market Share by Industry



- Automotive
- Retail
- Telecommunications
- Travel and Tourism
- Restaurants
- Miscellaneous
- **Education**
- Pharmaceuticals
- Electronics
- HH Appliances, Furnishings and Paint
- HH Building Materials and Fixtures
- Office Equipment and Manufacturing
- Pets
- Local Services
- Financial and Insurance
- Media
- Government and Organizations
- Medical Services and Equipment
- Food and Beverage
- Non-Rx Remedies
- Personal Care Products
- HH Supplies and Cleaners
- Apparel
- Energy
- Games, Toys and Sporting Goods

\$4B

The LA media market is nearly a **\$4.5B industry**

13th

Education ranks thirteenth by total media spend across all industries in LA



Outside of education, **there are many other industries**—and brands within each of those industries—**that compete for ad space and consumer attention, driving up prices and ad clutter**

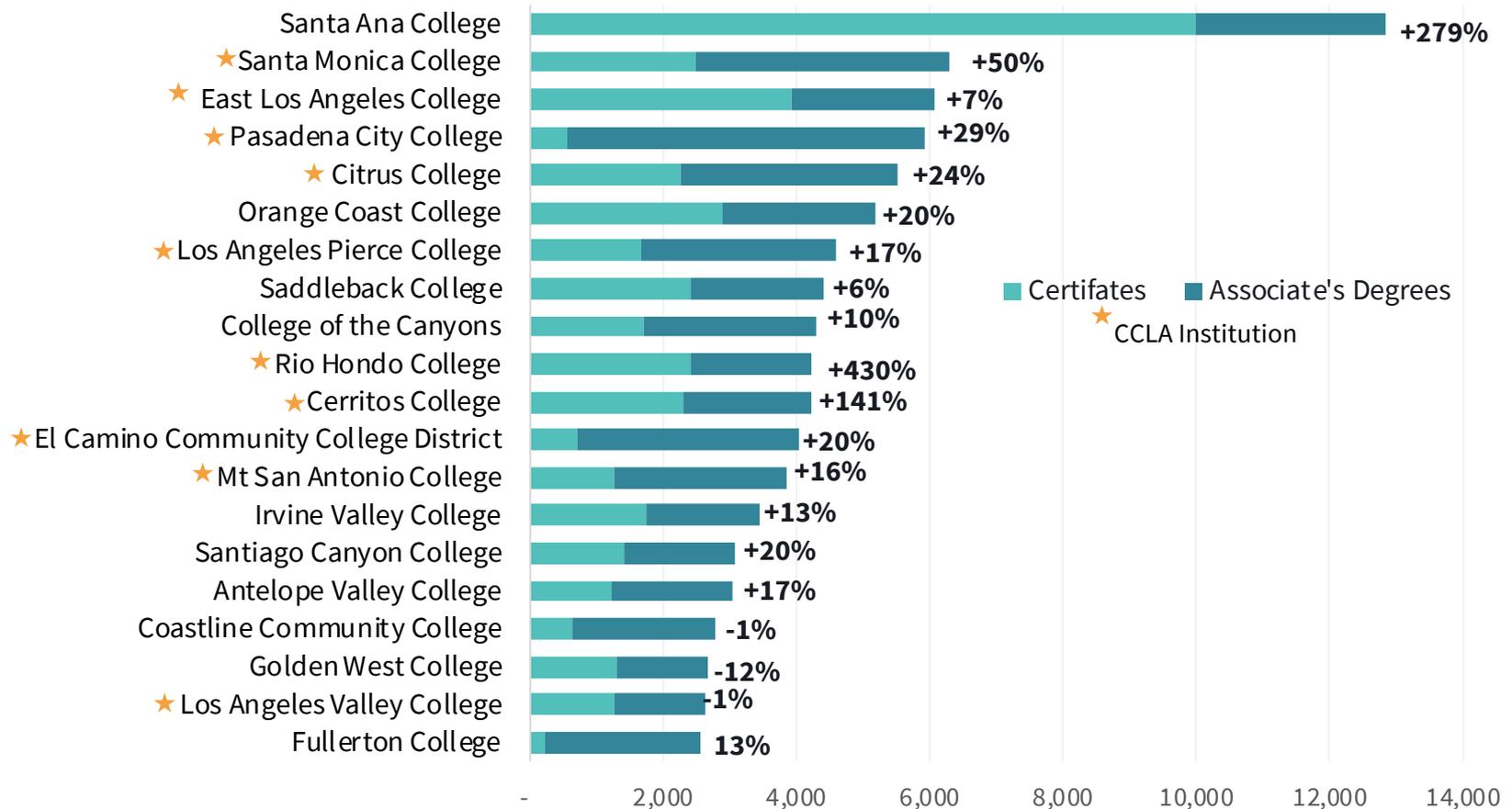


After paid search, which makes up 50% of spend, the channel **most heavily invested in within LA market is Spot TV**

Source: Kantar Media

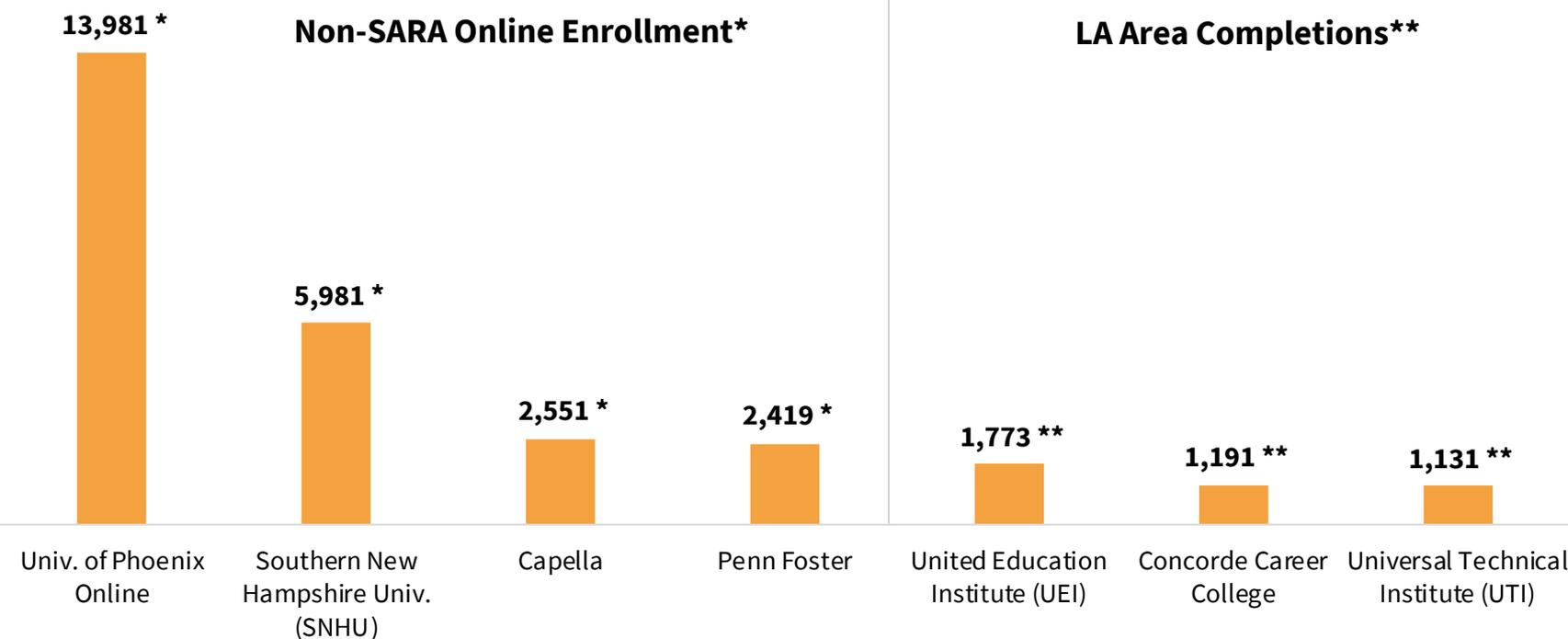
Largest Colleges by Completions in LA Metro Area

In the past year alone, community colleges in LA have experienced a **significant uptick in completions**, driven in large part by certificates. **Santa Ana College** has the most associate's degree and certificate completions of any school in the greater LA market, which were up significantly over the previous year.



Other Competitors in the Region

Large online providers and local vocational/trade schools also have a strong foothold in the LA metro area and directly compete with CCLA for similar students.



Source: Emsi, IPEDS, NC-Sara

*Non-Sara Online Enrollments of all award levels (includes only California and the following U.S. territories: American Samoa (AS), Commonwealth of the Northern Mariana Islands (CNMI), Federated States of Micronesia (FM), Guam (GU), Marshall Islands (MH), and Palau (PW).

** LA Area Completions = Total UG certificates + Associate’s degree completions (on ground and online) in the LA area (based on local office/campus reporting)

Competitive Analysis



— Top Competitors



University
of Phoenix®



NATIONAL
UNIVERSITY



SANTA ANA
COLLEGE



UNITED
EDUCATION
INSTITUTE



Competitive Landscape



INSTITUTION

University of Phoenix

PROGRAMS

- #4 Largest school of associates & UG certificate completions in country
- 5 Associate's Degree programs in follow areas: Business, Criminal Justice and Technology (3)
- 16 UG Certificates offered in Business (8), Healthcare (2), and Technology (6)
- 15 single course offerings in various fields of study

SIZE

- 13,981 Non-Sara enrollments
- 12,560 Associates + Certificates (US)
- University of Phoenix-California enrollment: 5,641

TUITION

Cost: \$398 per credit
Offer Work Equivalency Credits and Tuition Lock

FORMAT

100% online or on-campus "Learning Centers"

LEAD NURTURE

- Aggressive & sophisticated multimodal approach
- Persistent email, text, phone & voicemail

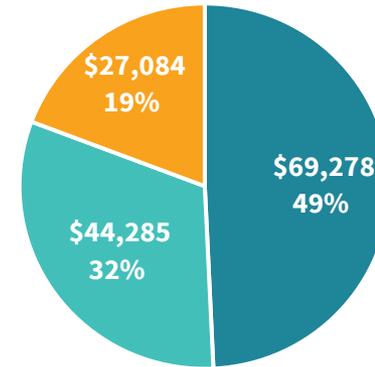
SEO

- 67 Authority Score
- 757.4k organic search traffic per month
- \$6.5M monthly organic traffic cost

NOTES

- For-profit university
- Open enrollment admission policy

Annual Media Spend & Channels (in Thousands \$)*



■ Internet Search ■ Cable TV ■ Network TV

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One subject.

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University of Phoenix®

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speed of tech

Earn your IT degree.

Apply now

Source: Kantar Media, SEM Rush, MOAT, Institution website
* NOTE: National level data. Does not include paid social media advertising

Competitive Landscape



INSTITUTION

Concorde Career Colleges

PROGRAMS

- Offer diploma and associate’s programs in nursing, patient care, dental, and allied health fields
- Operate 16 campuses across 8 states, mostly residential but some online bachelor's programs

SIZE

Associates + Certificate completions:

- LA: 1,191
- US: 6,609

TUITION

Cost: \$560-750 per credit
Offer Military Tuition Assistance

FORMAT

Mostly on-ground diploma & associate’s programs with some online bachelor’s degrees

LEAD NURTURE

- Email & text
- Daily outreach/communication

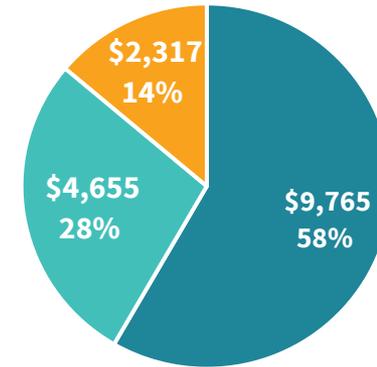
SEO

- 51 Authority Score
- 90k organic search traffic per month
- \$426k monthly organic traffic cost

NOTES

- A for-profit vocational/trade school
- Focused solely in the healthcare industry

Annual Media Spend & Channels (in Thousands \$)*



■ Internet Search ■ Spot TV ■ Mobile Web



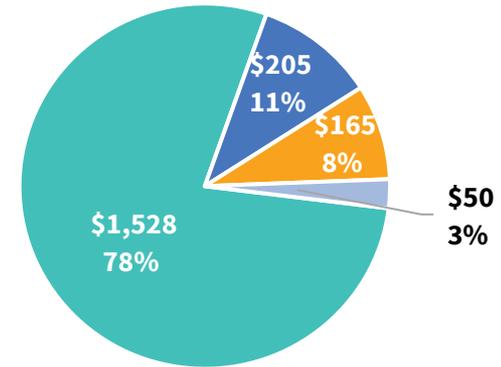
Source: Kantar Media, SEM Rush, MOAT, Institution website
* NOTE: National level data. Does not include paid social media advertising

Competitive Landscape



INSTITUTION	American Career College
PROGRAMS	<ul style="list-style-type: none"> • Diploma (6) & Associates (6) programs in healthcare • Based in the LA metro area with 3 locations: LA, Ontario, Orange County
SIZE	<p>2,307 Associates + Certificate completions 3,591 total enrollment for all 3 locations:</p> <ul style="list-style-type: none"> • Anaheim: 1,027 • LA: 1,284 • Ontario: 1,280
TUITION	Cost: \$900 per credit
FORMAT	On-ground diploma & associate's programs offered at 3 area locations
LEAD NURTURE	<ul style="list-style-type: none"> • Sporadic calls and emails
SEO	<ul style="list-style-type: none"> • 50 Authority Score • 37k organic search traffic per month • \$408k monthly organic traffic cost
NOTES	<ul style="list-style-type: none"> • A for-profit vocational/trade school headquartered in California • Focused solely in the healthcare industry

Annual Media Spend & Channels (in Thousands \$)*



- Spot TV
- Local Radio
- Outdoor
- Newspapers

Source: Kantar Media, SEM Rush, MOAT, Institution website
* NOTE: National level data. Does not include paid social media advertising

Competitive Landscape



NATIONAL
UNIVERSITY

INSTITUTION

National University

PROGRAMS

- Offer certificate and degree programs from associate up through doctoral level
- Fields of study: teaching & education, business & marketing, healthcare, nursing, social sciences, engineering & technology, criminal justice & law, arts & humanities, science & math
- Associates (7) and Certificate (9) programs
- Offered online and on ground throughout CA
- 40% student body enrolled exclusively online

SIZE

- 7,735 undergraduate enrollment
- 183 Associates + Certificates (LA)

TUITION

Cost: \$370 per quarter unit
Free online classes for those impacted by COVID

FORMAT

Primarily on ground with some online offerings

LEAD NURTURE

- Persistent multi-modal communication
- Leverage email, text & phone call/voicemail multiple times a day

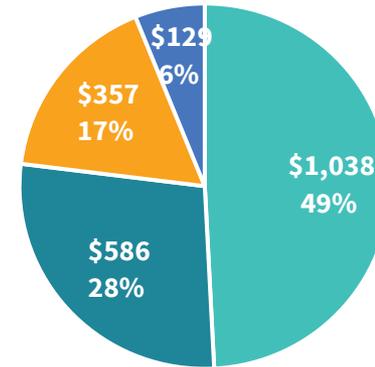
SEO

- 59 Authority Score
- 160k organic search traffic per month
- \$1.5M monthly organic traffic cost

NOTES

- Nonprofit accredited university headquartered in San Diego with campuses throughout California

Annual Media Spend & Channels (in Thousands \$)*



- Spot TV
- Internet Search
- Natl Spot Radio
- Local Radio



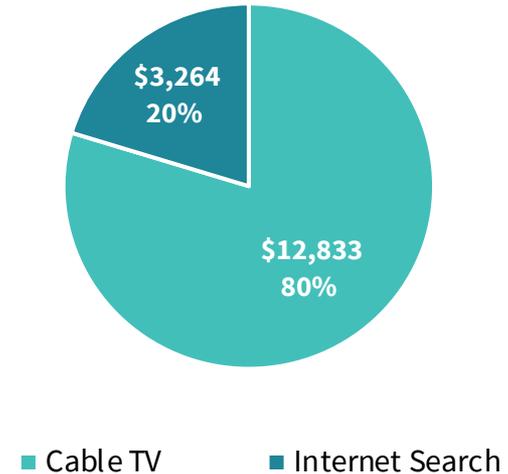
Source: Kantar Media, SEM Rush, MOAT, Institution website
* NOTE: National level data. Does not include paid social media advertising

Competitive Landscape



INSTITUTION	Universal Technical Institute (UTI)
PROGRAMS	<ul style="list-style-type: none"> • Technical training programs in automotive, diesel, motorcycle, welding, marine and collision repair industries • 4 schools, 12 campuses nationwide • 2 locations in greater LA area
SIZE	1,362 enrollment in LA area (7,308 in US)
TUITION	Full program cost: \$5,000 - \$50,000 depending on qualification
FORMAT	On-ground technical training programs. Only Auto/Diesel Technology & Collision Repair have certain online components, but no fully online programs
LEAD NURTURE	<ul style="list-style-type: none"> • One email with follow up via text & phone/voicemail
SEO	<ul style="list-style-type: none"> • 56 Authority Score • 190k organic search traffic per month • \$1.7M monthly organic traffic cost
NOTES	<ul style="list-style-type: none"> • A private for-profit technical non-degree granting school • Focused solely in technician training

Annual Media Spend & Channels (in Thousands \$)*



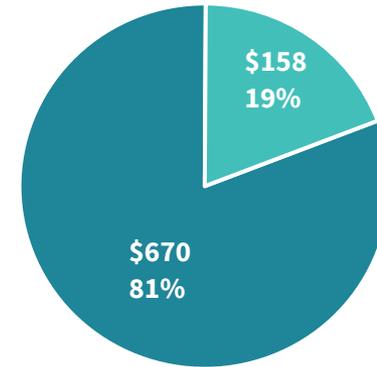
Source: Kantar Media, SEM Rush, MOAT, Institution website
 * NOTE: National level data. Does not include paid social media advertising

Competitive Landscape



INSTITUTION	United Education Institute (UEI)
PROGRAMS	<ul style="list-style-type: none"> Offers associate degrees and diploma programs in health care, trades & business Locations in 3 states: California, Arizona & Georgia. In CA, 13 campuses
SIZE	Associate's + Certificate completions: <ul style="list-style-type: none"> LA: 1,773 US: 2,892
TUITION	Cost: \$550-600 per credit
FORMAT	On-ground diploma & associate's programs offered at 5 area locations. Distance education starting May 28, 2020
LEAD NURTURE	<ul style="list-style-type: none"> Daily email, phone call & text message campaigns
SEO	<ul style="list-style-type: none"> 46 Authority Score 44k organic search traffic per month \$231k monthly organic traffic cost
NOTES	<ul style="list-style-type: none"> A for-profit vocational/trade school Specializes in short-term technical and vocational education

Annual Media Spend & Channels (in Thousands \$)*



■ Internet Search ■ Local Radio



Source: Kantar Media, SEM Rush, MOAT, Institution website
 * NOTE: National level data. Does not include paid social media advertising

Competitive Landscape



INSTITUTION

Santa Ana College

PROGRAMS

- Associate's and certificate programs
- 2+2 degree program pathway agreement with UC & CSU schools

SIZE

28,425 total enrollment
12,845 Associates + Certificate completions

TUITION

Cost: \$300 per unit

FORMAT

4 Online degree pathway programs with other hybrid and on-ground only options

LEAD NURTURE

- No RFI, only apply CTA
- No lead nurture strategy or communication in place

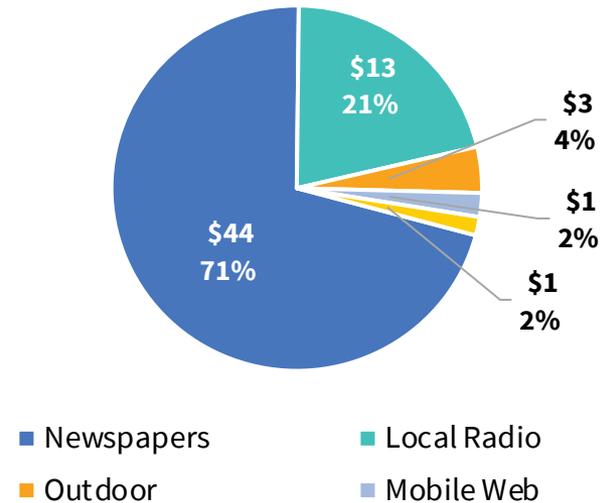
SEO

- 54 Authority Score
- 153k organic search traffic per month
- \$286k monthly organic traffic cost

NOTES

- Largest community college in Los Angeles metro area and third-largest in the country by completions (certificates + associate's degrees)
- Nearly 300% increase in completions over last year

Annual Media Spend & Channels (in Thousands \$)*



Source: Kantar Media, SEM Rush, MOAT, Institution website
* NOTE: National level data. Does not include paid social media advertising



Paid Search Best Practice & Performance

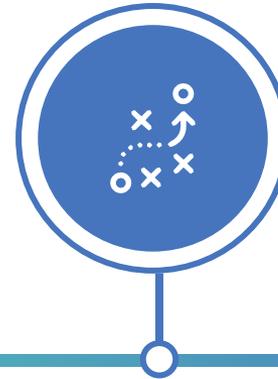
It's a Marathon, Not a Sprint.

How long does it take for Google AdWords to “work”? While timelines for each account depends on a multitude of factors including brand awareness, competitive landscape and budget, to name a few – across the board, **it takes time to establish a strong AdWords campaign.**



Days 1-7: Algorithm Analysis

After launching advertising campaigns into market, Google's platform algorithm requires 7-days of performance data before further optimizations are allowed.



Months 4-12: In Market Optimizations

Building on foundational campaign learnings; testing, learning, and optimizing campaigns to develop a strong campaign and drive results.



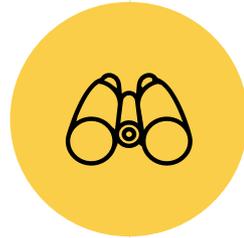
Months 1-3: Learning Phase

Each new campaign begins from ground zero – no rankings or scores. The first three months are when campaigns slowly earn credit with Google by proving a steady positive user experience.

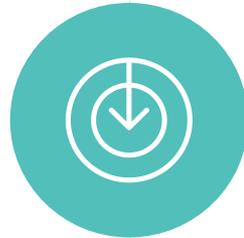
Building Rank & Credibility in Market



Google's ranking algorithm uses more than 255 factors in determining SEO page ranking, but the **most important** contributing factor is **age of the webpage**.



The older the webpage, the higher the rank – especially when targeting competitive & popular keywords.



In fact, the **average age** of the top-ranking webpage is around **two years or more** and 95% of newly published pages don't reach top 10 within a year.



Google trusts pages that are old enough to provide the most relevant information to searchers, and the higher the competition level the more difficult it is to reach top SERP rank.

Partnership Power of Owned & Paid Media

Brands that use paid media typically grow three times faster than those that rely on owned and earned media alone.

Owned media typically increases the effectiveness of a paid campaign by 13% and earned media by 26%.

SEMrush's brand monitoring section shows that for the keywords such as CCLA, community colleges of la, la community college, ccla.com does not appear among the most popular domains online.



Paid media will also be most effective when coupled with both strong earned and owned foundations.



This is also true online: paid online media is much more effective than unpaid.



Meaning, brand awareness of CCLA is still low – this is where advertising dollars helps boost searches and CCLA knowledge.

CCLA Keyword Research Insights

Analysis of CCLA campaign keywords since launch – identifying key trends and learnings after 7-months in market.

25%

Of all the google searches that our ads have shown up for, **25%** of the total search terms to-date were for **education or childcare programs**



Education programs are the most sought out field out of our campaign mix to-date – primarily high-level searches for **general associate education degrees**, followed by an even split for early childhood and childcare programs

24%

The second highest field of interest, which generated 24% of total searches to-date, were high-level general searches for **community colleges nearby**, and **general associate degrees**

- These general searches seem to bring in the most actionable leads, as they contributed the highest volume of RFI completions



The third highest field of interest, which generated 12% of total searches to-date, was for **photography programs**



The healthcare and medical fields are also very popular, particularly **nursing programs**

Paid Search Key Takeaways

FINDING

ACTION

Low Impression Share

We're losing impression share due to rank. Rank in terms of impression share is based on the max Cost-Per-Click x Quality Score formula that determines ad position among competitors.



Keyword Audit: pausing keywords with quality score of 1/10 and 2/10 and ad relevance of “Below Average”



Quality score improvement: this is the more cost-effective way to improve ad rank and thereby increase impression share. If we can boost our keywords' Quality Score, we will be able to achieve a higher rank without spending more



Ad Group Restructure & Clean Up: Look for opportunities to split our current ad groups into smaller, more tightly-themed groups of keywords so that we can write more relevant Expanded Text Ads and landing page copy.

Paid Search Key Takeaways

FINDING

ACTION

High Position Above Rate

Position above rate is defined by Google as “how often the other participant’s ad was shown in a higher position than ours was when both of your ads were shown at the same time.”

Analyzing the auction insights report, we saw most of our competitors have high position above rate.



Investigate ad groups and keyword: understand which ad groups or keywords this is happening with and identify “HIGH-value” keywords.



HIGH-value keyword action: if keyword or ad group is considered HIGH-value, we will: bid higher, increase our quality score, refine our targeting & keywords, create granular ad extensions

Paid Search Key Takeaways

FINDING

Low Outranking Share

This metric gives the best insight into how we are competing head-to-head with another competitor. The outranking share for most of our competitors are below 40%, which means most of our competitors are outbidding us and ranking above at some instances. All this might happen because of lower bidding than our competitor.

ACTION



Auction Insights Report: identify competitors who are ranking above us and understand how much lower we are bidding relative to them



Target Outranking Share: set up a bidding strategy that helps us outrank the competition by automatically modifying our bids daily, lowering or increasing as necessary, in order to outrank the ads from our competition

Search Trends since the Coronavirus Pandemic

There have been many noticeable changes in online search trends since COVID-19 as students grapple with a shift to distance education or consider returning to school given recent job displacement.

100%

Since the pandemic, searches related to the term, **“online college courses”** increased **100%** since this time last year



While many education-related search terms were down in March, **by April many education terms were trending up**—some significantly higher than the same time last year



Higher education saw a 10% **increase in searches related to “new career”** and an 8% increase in searches related to **vocational occupations**



Overall, there has been a significant search volume increase in the past month for **terms related to healthcare, education, and leadership degrees**

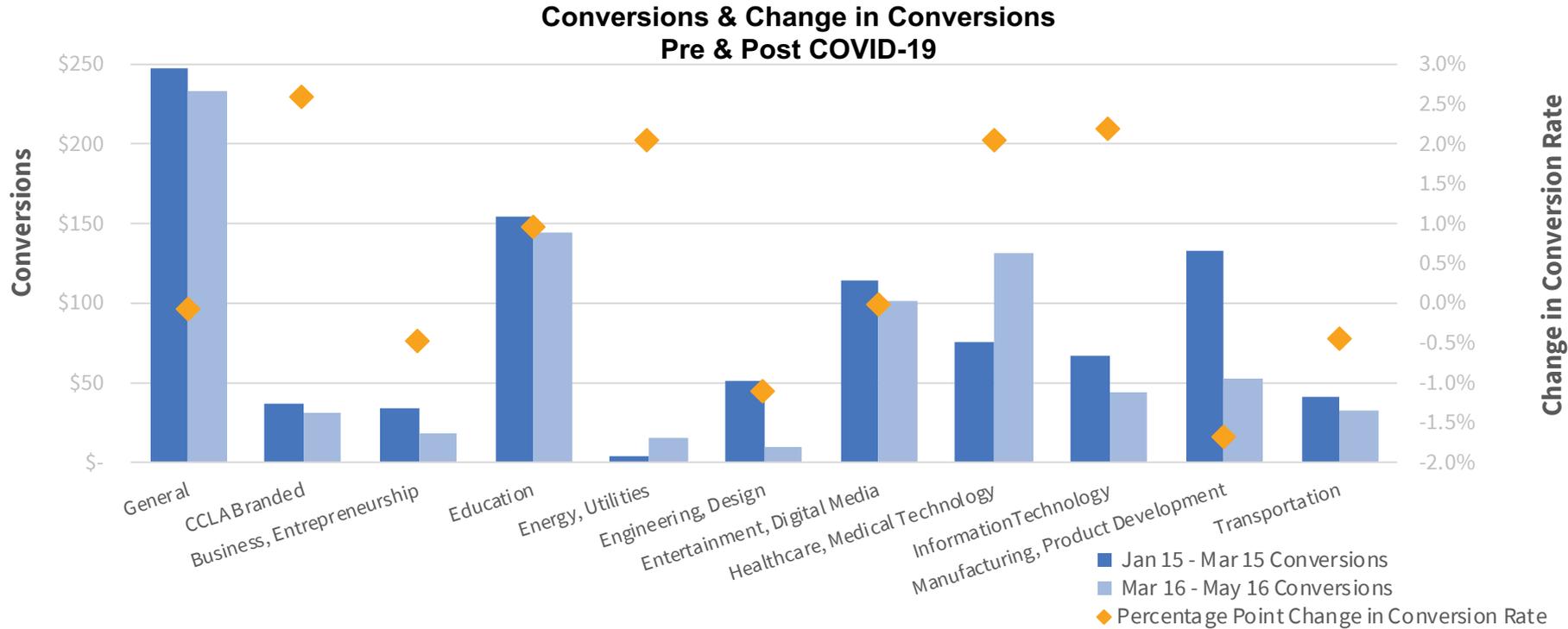


There were also increases in search volume for **non-degree-level-specific keywords, online graduate degrees and concentration-specific bachelor's programs**

CCLA Campaign Performance Since COVID-19, Conversion

Analysis and comparison of conversions in the two months leading up to the Coronavirus pandemic (Jan 15 – Mar 15) and the two months since (Mar 16 – May 16) along with the change in conversion rate over the two time periods.

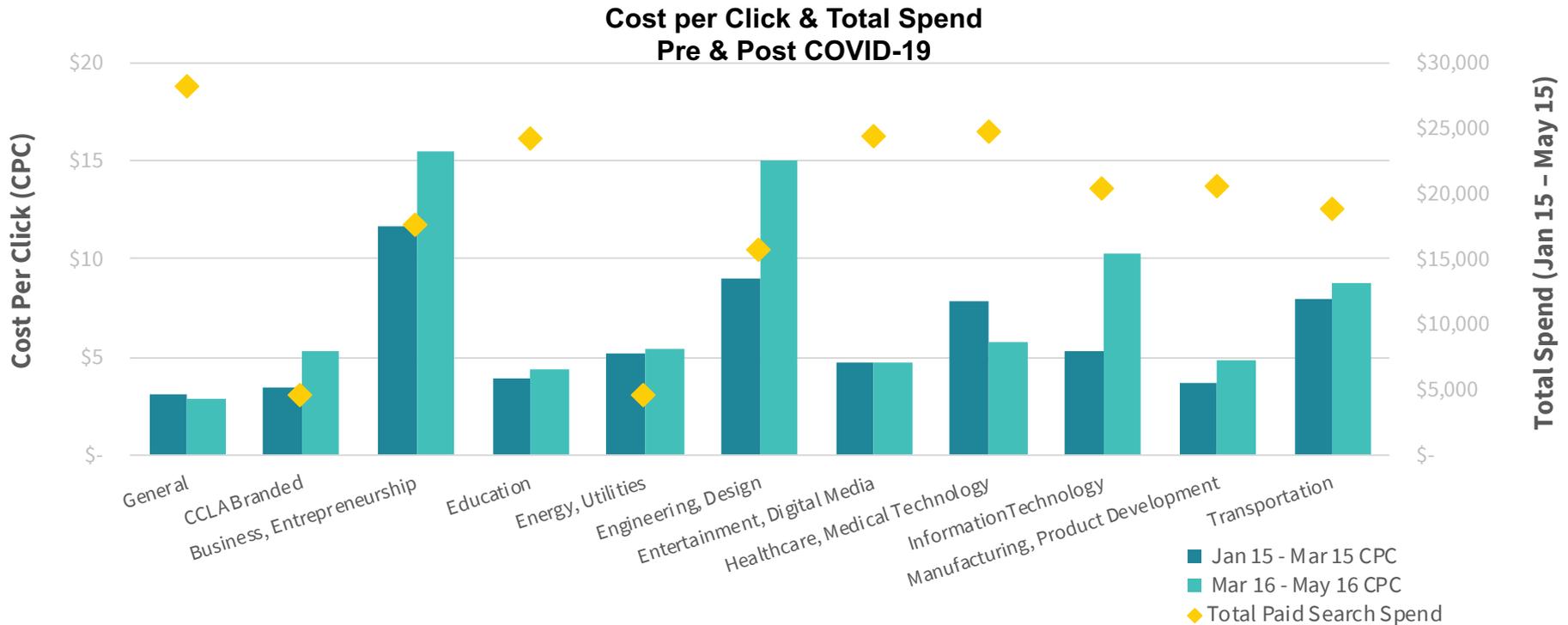
- Overall, there was a 17% decline in conversion volume as a result of 19% reduction in spend.
- The cost per conversion remained stable
- The conversion rate has experienced a 10% increase
- There has been a significant drop in conversions for Business, Engineering Design, Manufacturing and PD
- The biggest increase in conversion (+74%) came from the Healthcare Medical Technology campaign
- Most campaigns, including CCLA Branded, Education, Energy Utilities, Health Medical Technology and Information Tech have had an uptick in conversion rate.



CCLA Campaign Performance Since COVID-19, Cost

Analysis and comparison of cost per click (CPC) in the two months leading up to the Coronavirus pandemic (Jan 15 – Mar 15) and the two months since (Mar 16 – May 16) along with total spend in the past 4 months for each campaign.

- Across all but three of the campaigns, the cost per click (CPC) was up since the pandemic
- The most significant increases in CPC have been in Information Technology, Business, Education and Engineering Design campaigns
- Healthcare Medical Technology was the only campaign that saw a notable reduction in CPC even with high bid keyword terms.
- The General and Entertainment, Digital Media campaign had modest decreases in CPC



A woman with dark hair and glasses, wearing a white lab coat, is holding a molecular model. The model consists of several spheres connected by grey rods. The spheres are colored red, black, blue, and white. She is looking directly at the camera with a slight smile. The background is a blurred whiteboard with some faint text.

SEO Best Practice & Performance

What is SEO?

DEFINITION & GOALS

“*SEO (Search Engine Optimization) is the process of making your site better for search engines.*”

- [Google in SEO Starter Guide](#)



Increase the quality and quantity of organic traffic



Improve brand awareness and visibility online



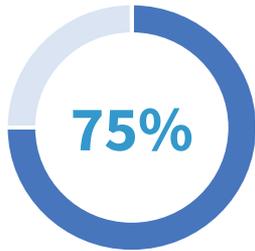
Generate new leads



Retain and convert leads

Is SEO really this important?

It's a dynamic, search-driven, customer-first online world, dominated by Google. The competition for audiences' attention is steep, and customer journeys are becoming increasingly more complex.



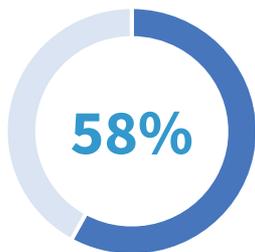
of **all** global desktop search traffic is attributed to Google



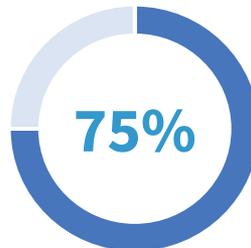
of the global population uses the Internet daily, making 6 billion organic searches on google.com alone



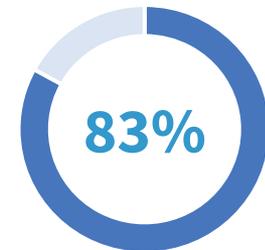
of purchases begin with an online search



of referral traffic to an average site is from Google (10x more than FB)



of searchers never click past Page 1 on Google, making the top 3 results most valuable with 67.7% of all clicks



of US shoppers who visited a store last week say they used search before doing so

Effectiveness & ROI from SEO-focused content

20x

more traffic opportunity than PPC on both mobile and desktop

3-5x

more leads

6x

higher conversion rates

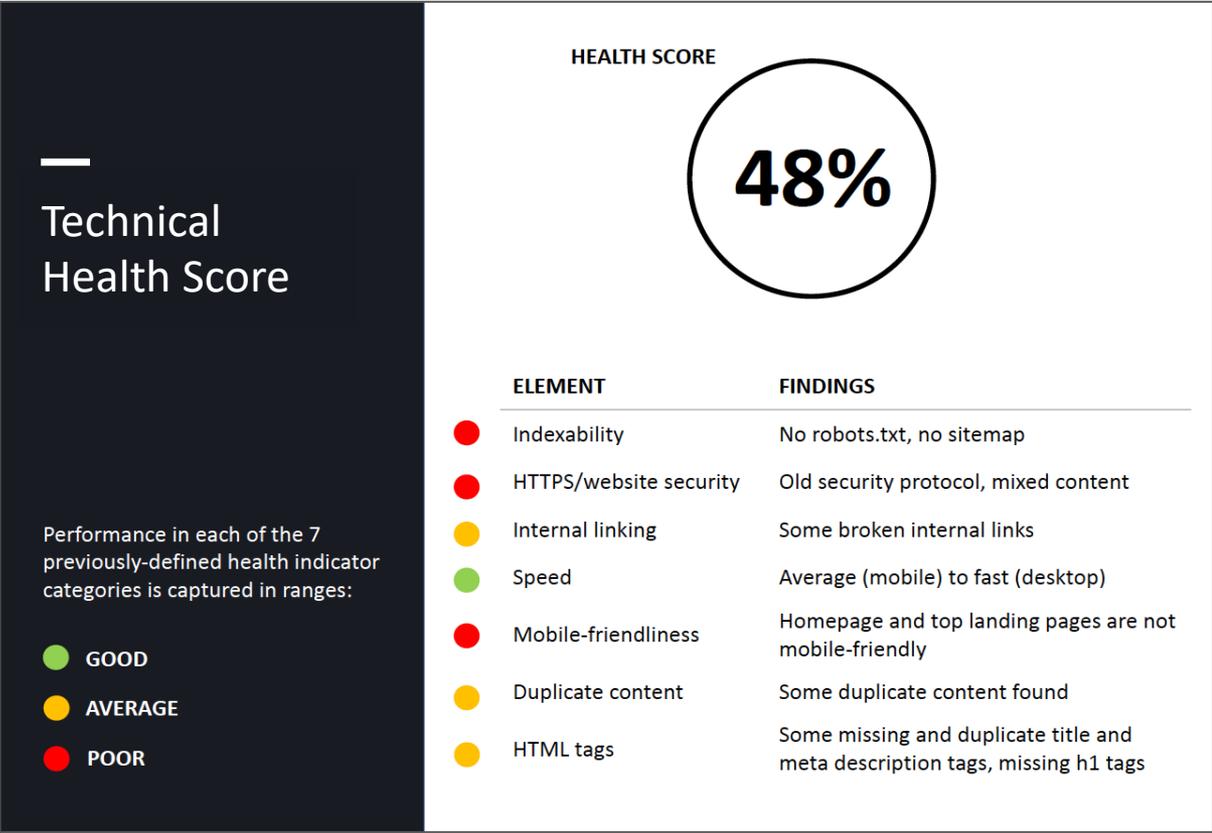
74%

of organizations that use SEO in combination with content marketing found that both **lead quantity** and **lead quality** improved drastically thanks to an informed content strategy

SEO-focused content allows brands to join conversations their audiences are already having and is, therefore, one of the most impactful strategies in reaching, engaging, and converting high-quality prospects.

CCLA SEO Technical Audit

The CCLA campaign project included an SEO audit of the technical aspects for each college website. The audit determined a technical health score for each website, based on the number of errors and warnings found and their uniqueness and severity against the total number of pages crawled (up to 10k per site/domain). The higher the score, the better optimized for search engines and the more user-friendly they are.



- LA19 websites scored in the 30—50% range
- Individual reports delivered to each institution
- Reports include top issues, explanations, and best practice recommendations

Sample report screenshot

Most Common Issues with CCLA SEO

All examined websites exhibited technical SEO issues. The most common and most concerning ones were related to HTTPS implementation and website security.

TOP COMMON ISSUES	CATEGORY
No HTTPS implemented	Security & HTTPS
Running SSL or old TLS protocol (version 1.0)	Security & HTTPS
Mixed content	Security & HTTPS
Duplicate content	Duplicates, Indexability
Duplicate and/or missing HTML tags	Meta tags, Duplicates, Indexability
Broken links	Link profile, Crawlability
Slow speed	Speed, Overall site performance, UX
Not mobile-friendly	Mobile

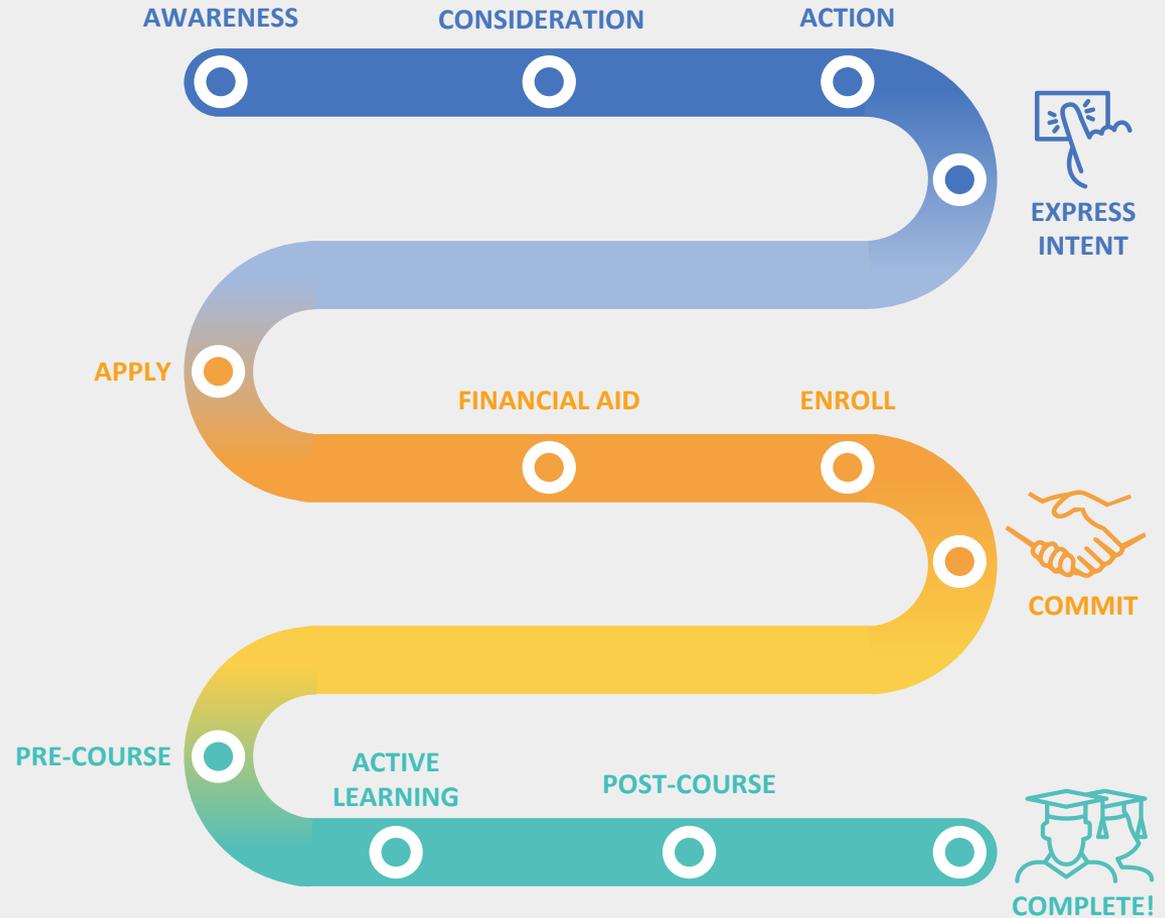
Lead Nurture Best Practices



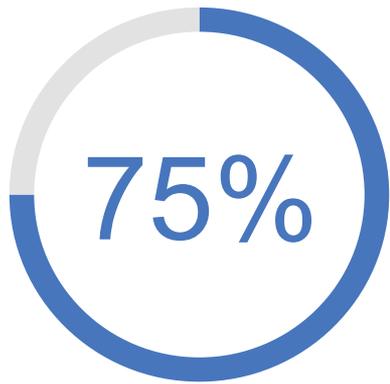
Lead-to-Enroll Takes Time

3-18
MONTHS

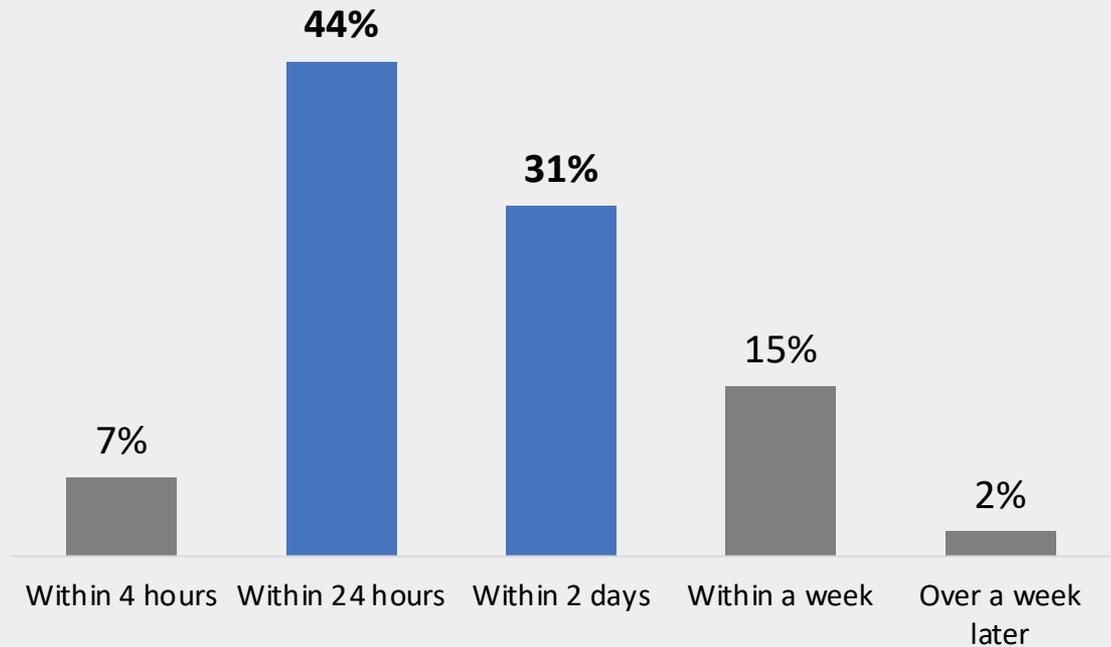
Students are often long-term buyers. The average length of their customer journey varies by degree, location, and/or modality.



Expectations on Follow-up are High



75% expect a response to a voicemail or an email within 24-48 hours.



Survey question fielded to 1,000 prospective students across all ages*:

If you left a voicemail for or sent an email to a college or university, how quickly would you expect to receive a response?

*Source: Blackboard research study completed in collaboration with UPCEA, March 2017

Lead Nurture can Help

In a highly competitive environment, a combination of a well-optimized, user-friendly website and a personalized, targeted lead nurture strategy can help differentiate your brand and minimize the time from lead to enroll.

Definition

Lead nurture is the process of continually developing a relationship of trust, authority, and expertise with every prospective student at every stage of the enrollment funnel and through every step of the prospect's customer journey. Typically achieved through various modes of communication like automated emails, calls, text messages (SMS), lead nurture focuses on listening to the needs of prospects and providing them with the information and answers they need in order to progress quicker through the enrollment funnel.

Goal

The goal of lead nurture is to speed up your direct access to leads and to increase your chances of converting them to enroll. As part of the process, it's important to help leads see your brand as the ultimate expert in the field and your program offerings as the best solutions for their needs.

Key terms

- **Lead/prospect** – an individual who has expressed interest in your programs, which makes him/her a potential student (customer)
- **Applicant** – an individual who has begun an application, whether fully submitted or incomplete
- **Admitted** – an individual who has been accepted for admission, regardless if s/he has paid a deposit or has registered for classes

Importance of Understanding Target Audiences

Responding to your prospective students' inquiries alone is not enough to win them over the competition. **Prospects expect fast, high-quality customer care, tailored to their needs and their circumstances.** Therefore, it is important to truly get to know your target audiences – who they are, what their needs/fears/aspirations are, how they consume media and information, etc. **The better you know your audience, the more tailored your pre-enrollment nurture can be, thus increasing the chances for enrollment.**



Young Learners

High school graduates interested in furthering their education, but either dropped out of a 4-Year or were never accepted



Aspiring Bachelor Seekers

Graduating high school students interested in earning their bachelor's degree from a respected institution



Parents

Parents of high school graduates or future graduates who are very involved in their children's lives and drivers in their decision process



Adult Learners

Working professional motivated to advance their career by furthering their education in a growing field

Tailoring Lead Nurture Through Segmentation

Knowing your audiences well will allow you to group them into segments according to personal attributes (both attributes you have collected through forms and events and attributes you have assumed based on their persona profile). Each segment should have its own communication strategy in order to maximize the impact of outreach and to create a more meaningful engagement.

SAMPLE COMMUNICATION SEGMENTATION MATRIX

(Best-practice email segmentation combination options for existing audiences)

Funnel Stage	SEGMENT PROSPECTS
Attribute	BY DEMOGRAPHICS (age, gender, company, job title, income level, etc.)
Attribute	BY AFFILIATION (job function and industry or some other relevant affiliation.)
Attribute	BY SIGN-UP SOURCE (info session, event, website homepage, blog, ads, social posts, etc.)
Attribute	BY ENGAGEMENT HISTORY (opened other emails, contacted the College, registered for an event on campus or online)
Attribute	BY INACTIVITY (are they opening emails, are they clicking, have they taken an info session, have they begun an application)
Funnel Stage	SEGMENT APPLICANTS
Attribute	BY DEMOGRAPHICS (age, gender, company, job title, etc.)
Attribute	BY AFFILIATION (military, job function and industry)
Attribute	BY INTEREST & PREFERENCES (interests they've indicated around program modality or specialization)
Attribute	BY ACTIVITY (started an application but is incomplete; stopped engaging with calls from enrollment team, stopped opening emails)
Funnel Stage	SEGMENT STUDENTS & BUILD BRAND ADVOCATES
Attribute	BY ENGAGEMENT (deposit missing, enrollment in classes missing)
Attribute	BY ACADEMIC SUCCESS

Top Takeaways



Top Takeaways

With declining enrollments and shifting demographics, community colleges have experienced new and growing competition from providers attracting the students community colleges have traditionally served. Furthermore, the current pandemic is likely to alter student demand and enrollment behavior in unprecedented ways.

As the competitive landscape becomes increasingly diverse, the product offerings are diversifying as well—with various format and credentialing options to attract the evolving needs of today’s “post-traditional” student.

An increase in competition has meant an increase in recruitment tactics. Schools are investing more and more in marketing, especially digital channels. Advertising is up across the industry and nation, and is particularly active in the competitive LA market, making it expensive.

As prospective students increasingly turn to the internet to research their education options, it is more important than ever to have a strong organic presence to be top-of-mind as students make decisions.

In this competitive environment, it’s important that schools follow up with prospective students once they express interest to support them through the decision-making process and increase their chances of enrolling. This step is often overlooked and is essential to converting leads that are very expensive.

Monitor the competitive landscape to keep a pulse on competitive tuition, program offerings, and recruitment tactics. Consider new opportunities and pivot existing strategy as needed in face of COVID-19 pandemic.

Understand student demand—from a program and format standpoint—and consider updating offerings to meet students’ changing needs to ensure CCLA is positioned competitively.

Continue to invest in advertising, leveraging cost-effective, direct-respond channels to maximize return. Track and analyze performance, pivoting and iterating as needed to optimize results.

Engage separate CCLA campuses in widespread effort to improve SEO based on findings and actionable insights from Blackboard SEO report.

Ensure prospective students are being nurtured through the entire enrollment funnel—from the initial inquiry through to filling out an application and ultimately enrolling. Engage in comprehensive and cohesive multi-modal outreach.

Blackboard[®]

Appendix



Media – Auction Bidding Insights (Overall)

In the Google marketplace, there has been a shift since COVID-19 in what competitors are spending that has impacted who CCLA is competing with directly. The auction bidding insights show the competitors from pre-COVID to post-COVID over the past few months.

General Campaign

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	25.24%	--	--	--
nu.edu	11.23%	8.94%	71.21%	23.63%
uei.edu	12.29%	22.61%	57.36%	21.97%
devry.edu	12.64%	15.62%	56.73%	23.00%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	26.76%	--	--	--
devry.edu	12.94%	17.98%	58.19%	23.96%
phoenix.edu	< 10%	4.03%	84.59%	25.85%
apus.edu	< 10%	5.94%	65.43%	25.72%
nu.edu	< 10%	4.72%	71.32%	25.86%
wgu.edu	< 10%	4.24%	59.11%	26.09%
sjvc.edu	< 10%	7.75%	65.54%	25.40%

Media – Auction Bidding Insights by Program Area

Healthcare Medical Technology

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	44.65%--	--	--	--
westcoastuniversity.edu	33.36%	52.13%	77.34%	26.65%
americancareercollege.edu	24.44%	39.00%	57.89%	34.57%
stanbridge.edu	23.09%	38.68%	50.73%	35.89%
concorde.edu	10.85%	14.13%	62.03%	40.73%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	62.22%--	--	--	--
wgu.edu	13.01%	15.80%	36.65%	58.61%
coloradotech.edu	13.12%	16.73%	56.18%	56.37%
americancareercollege.edu	23.18%	28.85%	47.30%	53.72%
concorde.edu	23.20%	27.33%	48.75%	53.93%
stanbridge.edu	29.34%	39.93%	53.53%	48.92%
westcoastuniversity.edu	29.67%	39.99%	23.23%	56.44%

Media – Auction Bidding Insights by Program Area

Manufacturing – Product Development

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	34.44%--	--	--	--
weldingclass.org	10.17%	20.28%	13.40%	33.50%
generalassemb.ly	10.26%	16.34%	78.03%	30.05%
summitcollege.edu	13.10%	19.20%	88.94%	28.56%
uei.edu	13.83%	12.38%	90.20%	30.59%
uti.edu	27.02%	37.72%	92.62%	22.41%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	32.27%--	--	--	--
generalassemb.ly	10.28%	19.96%	68.75%	27.84%
fiverr.com	10.73%	10.46%	56.23%	30.37%

Media – Auction Bidding Insights by Program Area

Education

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	19.04%	--	--	--
ashford.edu	32.81%	14.69%	92.58%	16.45%
csuglobal.edu	16.16%	0.91%	68.93%	18.92%
nu.edu	17.95%	21.50%	85.54%	15.54%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	19.70%	--	--	--
ashford.edu	31.27%	14.12%	90.08%	17.20%
gcu.edu	11.98%	18.44%	75.76%	16.95%
nu.edu	12.34%	22.16%	71.96%	16.56%
pacificoaks.edu	< 10%	13.87%	85.44%	17.37%
wgu.edu	< 10%	14.08%	61.94%	17.99%
devry.edu	< 10%	7.13%	66.34%	18.77%

Media – Auction Bidding Insights by Program Area

Manufacturing & Product Development

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	34.44%--	--	--	--
weldingclass.org	10.17%	20.28%	13.40%	33.50%
generalassemb.ly	10.26%	16.34%	78.03%	30.05%
summitcollege.edu	13.10%	19.20%	88.94%	28.56%
uei.edu	13.83%	12.38%	90.20%	30.59%
uti.edu	27.02%	37.72%	92.62%	22.41%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	32.27%--	--	--	--
generalassemb.ly	10.28%	19.96%	68.75%	27.84%
fiverr.com	10.73%	10.46%	56.23%	30.37%

Media – Auction Bidding Insights by Program Area

Entertainment & Digital Media

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	35.63%	--	--	--
ecornell.com	11.53%	4.38%	82.58%	34.34%
rmcad.edu	11.73%	17.44%	81.19%	30.58%
academyart.edu	16.54%	32.26%	40.92%	30.93%
generalassemb.ly	17.81%	12.48%	90.77%	31.59%
lafilm.edu	24.20%	33.50%	57.08%	28.82%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	30.74%	--	--	--
academyart.edu	13.77%	27.02%	44.00%	27.09%
lafilm.edu	15.23%	19.07%	67.47%	26.79%
generalassemb.ly	11.77%	10.29%	81.46%	28.17%
ecornell.com	11.97%	6.09%	83.85%	29.17%
nyfa.edu	11.61%	20.10%	39.53%	28.30%
fullsail.edu	10.42%	11.38%	78.51%	28.00%
udemy.com	13.06%	19.82%	40.34%	28.29%

Media – Auction Bidding Insights by Program Area

Information Technology

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	17.56%--	--	--	--
flatironschool.com	10.16%	13.08%	86.39%	15.58%
uclaextension.edu	11.65%	15.24%	88.19%	15.20%
devry.edu	12.38%	9.25%	76.78%	16.31%
generalassemb.ly	15.63%	19.82%	76.79%	14.89%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	25.40%--	--	--	--
devry.edu	13.24%	16.96%	60.86%	22.77%
phoenix.edu	12.27%	10.16%	75.16%	23.46%
ciat.edu	10.40%	11.17%	73.44%	23.31%
umgc.edu	10.53%	13.49%	52.72%	23.59%

Media – Auction Bidding Insights by Program Area

Transportation

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	56.16%--		--	--
uti.edu	31.97%	39.51%	79.54%	38.51%
uei.edu	24.72%	32.21%	76.75%	42.28%
atpflightschool.com	19.60%	8.94%	64.68%	52.91%
spartan.edu	17.93%	13.65%	90.32%	49.24%
flyaeroguard.com	16.06%	7.35%	66.43%	53.42%
lincolnedu-usa.com	13.73%	18.42%	34.49%	52.59%
pennfoster.edu	10.96%	15.96%	4.22%	55.78%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	49.46%--		--	--
uti.edu	28.95%	38.53%	85.62%	33.15%
spartan.edu	16.87%	16.86%	94.41%	41.59%
uei.edu	22.59%	27.29%	77.20%	39.04%
atpflightschool.com	13.67%	7.89%	67.73%	46.82%

Media – Auction Bidding Insights by Program Area

Business

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	40.18%	--	--	--
phoenix.edu	13.84%	12.56%	46.20%	37.85%
wgu.edu	15.37%	16.34%	27.74%	38.36%
devry.edu	19.29%	20.80%	52.96%	35.76%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	48.08%	--	--	--
asu.edu	< 10%	11.30%	46.09%	45.57%
devry.edu	< 10%	12.71%	26.31%	46.47%
strayer.edu	< 10%	13.34%	26.52%	46.38%
hbs.edu	< 10%	14.60%	26.94%	46.19%
northeastern.edu	< 10%	8.21%	35.03%	46.70%
psu.edu	10.33%	17.42%	19.61%	46.44%
ashford.edu	< 10%	12.34%	43.03%	45.53%

Media – Auction Bidding Insights by Program Area

Energy Utilities

Pre-COVID: Oct 10, 2019 – Feb 10, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	28.25%	--	--	--
audesigndrafting.com	< 10%	7.08%	35.98%	27.53%
phoenix.edu	< 10%	10.90%	77.03%	25.88%

April 1, 2020 – May 31, 2020

Display URL domain	Impression share	Overlap rate	Position above rate	Outranking share
CCLA	25.14%	--	--	--
apus.edu	< 10%	8.97%	73.53%	23.48%
phoenix.edu	< 10%	7.71%	75.07%	23.68%

Glossary of Terms

IMPRESSION SHARE

The percentage of impressions we got versus the total amount of impressions our ad qualified for. For example, an Impression Share of 40% means our ad only showed up 40% of the time that it could have. Keep in mind, your competitors' Impression Share will be dependent on their own targeting criteria, statuses, bids and Quality Scores, so these numbers will be hard to compare against each other.

POSITION ABOVE RATE

How often another advertiser's ad in the same auction shows in a higher position than our own, and only when both of our ads appeared at the same time. If a competitor had a Position Above Rate of 50% and our Overlap Rate was 20%, that would mean that roughly 10% of the time our search ad was in the auction, the competing advertiser appeared above our ad.

OVERLAP RATE

How often another advertiser's ad received an impression in the same auction that your ad also received an impression. If another advertiser has an Overlap Rate of 20%, this means the competitor appeared in the same search results a fifth of the time our ad appeared. The higher the Overlap Rate the more likely we have similar targeting, Ad Rank, and budgets as the other advertiser. If their Overlap Rate is low, it could be due to a very small overlap in targeting, or that they have a smaller budget, or low-Quality Scores.

OUTRANKING SHARE

A percentage that represents the number of times your ad either ranked higher in the search auction than a competitor's ad or appeared when the competitor did not. This metric gives the best insight into how we are competing head-to-head with another competitor. If another advertiser is our sworn enemy, we want this metric as close to 100% as possible to make sure our ad appears first and is visible whenever possible, especially if we have a high Overlap Rate with that competitor.

AUTHORITY SCORE

SEMRush provides an Authority Score for all domains, which is a proprietary metric used to measure overall quality of domain and influence on SEO. The score is based on the number of backlinks, referring domains, organic search traffic, and other data. The score is on a 100-point scale.
