The Challenge

- Mindset Segmentation Toolkit
- "College" Search: Use, Trust, and Doubt
- Implications
- Q/A & Discussion
Demographics

The EM Vice Grip

Differentiation

Segmentation
✓ The Challenge

✓ Mindset Segmentation Toolkit

✓ "College" Search: Use, Trust, and Doubt

✓ Implications

✓ Q/A & Discussion
Building Enrollment Mindsets

Screening questions:
enrollment plans
demographics
key variables

• Why enroll? What are your expectations? How will this change your life?

• How will you learn best? What are your preferred learning experiences?

• What would be your desired program features? What are your investment decision criteria?
Traditional Student Mindsets

**Career**
- Experiential Interests: 29%
- Career Pragmatists: 19%

**Experience**
- Social Focus: 20%
- Exploration & Meaning: 19%

**Academic**
- Career Through Academics: 14%
- Grad School Bound: 12%
Adult / Working Learner Mindsets

- Personal Fulfillment
- Academic Focused
- New Direction
- Career Advancement
- Desperate Dreamers
- Career Advancement
- Content But Indifferent
- Risk Averse
- Successful But Skeptical

Immersion
- Graduate Degree
- Certificate/Non-Credit Courses
- Undergraduate Degree

Convenience

Career Advancement
The Challenge

Mindset Segmentation Toolkit

"College" Search: Use, Trust, and Doubt

Implications

Q/A & Discussion
Can You Hear Me Now?
From Application to Enrollment: Shifting Priorities

Experiential Interests
- Academic environment
- Career preparation
- Diversity of academic opportunities

Exploration & Meaning
- Affordability
- Core academic experiences
- Social environment

Social Focus

Career through Academics

Career Pragmatists

Grad School Bound
But as Some things Change, Others Stay the Same

Experiential Interests
Exploration & Meaning
Social Focus
Career through Academics
Career Pragmatists
Grad School Bound

0%
15%
30%
45%
60%
75%

Affordability
Core academic experiences
Social Media Engagement by Traditional Mindsets

Have you “followed” or “liked” a college you are considering?

<table>
<thead>
<tr>
<th>Mindset</th>
<th>Yes</th>
<th>No</th>
<th>Have not used social media in my college research process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploration and Meaning</td>
<td>21%</td>
<td>25%</td>
<td>53%</td>
</tr>
<tr>
<td>Social Focus</td>
<td>15%</td>
<td>25%</td>
<td>60%</td>
</tr>
<tr>
<td>Grad School Bound</td>
<td>27%</td>
<td>27%</td>
<td>46%</td>
</tr>
<tr>
<td>Career through Academics</td>
<td>27%</td>
<td>23%</td>
<td>50%</td>
</tr>
<tr>
<td>Experiential Interests</td>
<td>26%</td>
<td>33%</td>
<td>41%</td>
</tr>
<tr>
<td>Career Pragmatists</td>
<td>22%</td>
<td>27%</td>
<td>51%</td>
</tr>
</tbody>
</table>
Meeting them Where they Are (Traditional)

Social Media Use, 2019

<table>
<thead>
<tr>
<th>Platform</th>
<th>General Use</th>
<th>Use in College Search</th>
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</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>97%</td>
<td>62%</td>
</tr>
<tr>
<td>Instagram</td>
<td>84%</td>
<td>50%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>83%</td>
<td>26%</td>
</tr>
<tr>
<td>Facebook</td>
<td>56%</td>
<td>27%</td>
</tr>
<tr>
<td>Twitter</td>
<td>49%</td>
<td>25%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>46%</td>
<td>14%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>17%</td>
<td>4%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>12%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Moving from Use to Awareness (Traditional)

In early stages of college search, what made you aware?

- Emails from schools
- Word-of-mouth from family/friends
- School websites
- Postcards/brochures from schools
- Local colleges/universities
- Rankings (e.g., U.S. News & World Report)
- Social media
- Recommendations from my high school counselor
- Search engines
- Recommendations of high school teacher
- Online guides to colleges/universities
- Contact with current college students/alumni
- Print guides to colleges/universities
- Contact with college faculty

- Green bars indicate requested info from schools.
- Orange bars indicate have not requested info.
Trust vs Doubt (Traditional)

Top 10 Trusted Sources for Information about Colleges

1. School websites - 30%
2. Contact with current college students/alumni - 29%
3. Emails from schools - 26%
4. Contact with college faculty - 24%
5. Word-of-mouth from family/friends - 24%
6. Recommendations from my high school counselor - 23%
7. Rankings (e.g., U.S. News & World Report) - 23%
8. Postcards/brochures from schools - 16%
9. Recommendations of high school teacher - 14%
10. Print guides to colleges/universities - 13%
Predominant Search & Communication (Traditional)

- Top used information channels
- Over 50% would avoid speaking directly (37% + 20%).
- Balance continue to network with college admissions, alumni, family and friends.
Graduate Seeking Prospects (Working Adult)
During the Prior Year, Which Sources have You Used to Research Schools?

- Academic Focus
- Career Advancement
- Successful But Skeptical

Graph showing the percentage of prospects using various sources for research.
Use, Trust and Doubt (Working Adults – Undergrad)
Yes, we can hear you now…

I got the cutest puzzle in the mail with info from that school.

Alexa, when is my application due?

What was the title of that program my teammate told me about?

I’ll check out that school’s website on my break or ride home.
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Patterns of Use, Trust and Doubt

Traditional / 1st Time/Full Time

- Can be eager consumers, but also can go stealth
- More brand sensitive
- Blurred lines between social media lives and college search / decision-making
- But, all social media channels are not alike
- Responsive to personalization – print, social media, direct contact
- Likely on communication overload

“When you've got a 6 inch stack of college mail every week, it really helps a college to stand out from the others if their mail is different somehow.”
Patterns of Use, Trust and Doubt

Adult / Working

- Experienced consumers: greater skepticism, desire for faster, transactional experiences
- Reliant on existing personal networks and local connections
- Reluctant to engage in direct dialogue with prospective school or program
- Brand sensitivity often related to degree/program goals, available capital, and career pathway

“Don’t call me; I’ll call you or try to find it on your website”
Implications for EM, Marketing, & Strategic Planning

- The road to market and brand differentiation just got harder; there are no short cuts to standing out among your peer / cross-app schools

- Mindset differentiation & segmentation WILL shed new light but also ADD new challenges, processes and complications

- Business units grounded in experience with traditional student populations CAN adapt, but it requires MORE than a content / message refresh

- Confirms the importance of precision-goal setting, understanding your learner’s decision-making, and the job-market THEY wish to enter

- Measure once, twice, thrice... before you “cut”; embrace the complexity
Thank you.

ANY QUESTIONS?

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