

CSUCI Student Market Research Campus Presentation

April 2009

Objective of the Engagement is Largely to Inform Marketing

- Understand what draws students to CSUCI and to competitors
- Identify resources students use to learn about CSUCI and competitors
- Understand the profile and perceptions of prospects
- Determine whether current students are generally satisfied

Methodology

- **Two focus groups were held with a mix of high school and transfer students in the local area in May 2008 - these focus groups primarily informed development of the quantitative survey instrument**
 - One group was focused on Latino market (although no differences in results across the two groups exists)
- **Web Based survey was sent to CSUCI prospects and students in November 2008 including:**
 - **Current CSUCI students**
 - **Non-enrolling Admits** (Admitted to CSUCI but did not matriculate)
 - **Inquiries** (Showed interest but never applied)

Group Surveyed	Qualified Completes	Response Rate
Current CSUCI students	785	21%
Non-enrolling Admits	221	4%
Non-applying Inquiries	38	5%

- What drives students to select CSUCI and the competition?
 - Enrollment drivers and student decision-making criteria
 - CSUCI in the competitive landscape
 - Target markets
- How is CSUCI reaching its audience?
- How is CSUCI doing with current students?

CSUCI Admits Enrolling Elsewhere Focus More on Academic Quality and Career Prep than Do CSUCI Students When Selecting a School

Percent Rating Feature as 'Significant' in Decision to Enroll		
Academic and/or Campus Feature	Current	Admits Enrolled Elsewhere
Location compared to home	80%	58%
Availability of specific major program	77%	73%
Small class size	72%	41%
Quality of academics	61%	71%
Career preparation	61%	66%
Cost	61%	50%
Campus size	59%	38%
Setting/physical environment	59%	53%
Ability to complete program in timely manner	55%	41%
Faculty quality	53%	52%
Reputation of specific major program	44%	59%

Eduventures national benchmark studies indicate that career preparation is second only to quality academics when traditional students and parents are evaluating schools; convenience and flexibility are second to academic quality for adult students.

Focusing on Messaging Related to Key Enrollment Drivers - Quality Academics & Career Prep - Will Likely Help to Convert More Admits

Admits Enrolled Elsewhere Perceptions of CSUCI				
	CSUCI Traits	Agree/ Strongly Agree	Disagree/ Strongly Disagree	Don't Know
Important enrollment drivers to Admits Enrolled Elsewhere	Quality academics	63%	6%	31%
	Good career preparation	49%	6%	44%
	Good program reputation	58%	15%	27%
	Nice campus setting/physical environment	81%	7%	12%
	Quality faculty	44%	3%	54%
Semi-important enrollment drivers	Helpful staff	44%	4%	52%
	Commitment to student needs/interests	48%	4%	48%
	Broad variety of majors/courses in major	44%	28%	29%
	Sense of community	40%	11%	49%
	Small class sizes	62%	3%	35%
	Good preparation for graduate school	34%	12%	54%
Weaker enrollment drivers	Ethnic/cultural diversity	48%	8%	43%
	Community and social opportunities	36%	14%	51%
	Opportunity to participate in extracurricular activity	41%	16%	43%

This is good news - CSUCI has a chance to CREATE perception; CSUCI does not have to UNDO negative perceptions.

Focus Group Responses Corroborate Fact that Students do Not Have Clear or Strong Perceptions of CSUCI, especially Regarding Academic Quality

- Most common descriptors of CSUCI in focus groups are fairly vague
 - New, just starting up, a beginning, just beginning to grow
 - Beautiful campus, pretty, typical CA surroundings, lots of space
 - Close to home, safe
 - No social life, not a lot going on
 - Not a lot of majors, doesn't have my major
- Nursing is the single major that students identify with CSUCI
- Questions students raised about academic quality that indicate some misperceptions include:
 - Did the school get accredited? Are individual programs accredited? Should they be?
 - Why aren't SATs required? Why is the GPA requirement low?
- The majority of focus group participants wanted to see more about internships at CSUCI; some wanted to see more about research opportunities with faculty

Interestingly, Admits Enrolled Elsewhere Apply to CSUCI for the Same Reasons that Current CSUCI Students Enroll At CSUCI

“Why did you choose CSUCI?”
***Current students say*¹:**

- Proximity to home/work (25%)
- Small class size (11%)
- General location (11%)
- Cost/financial aid (8%)
- Particular major available (8%)
- Small school environment (7%)

“Why did you apply to CSUCI?”
Admits Enrolled Elsewhere said¹:

- General location (19%)
- Proximity to home/work (18%)
- Small class size (9%)
- Particular major available (8%)
- Not accepted at top choice (7%)

¹ Analyzed from open-ended responses

But Enrollment Driver Gaps Between These Two Groups Confirm that Admits Enrolled Elsewhere Are More Likely to Select Based on Factors Related to Academic Quality

Most Significant Enrollment Driver Gaps Between Current CSUCI Students and Admits Enrolled Elsewhere

	Academic and/or Campus Feature	Current	Admits Enrolled Elsewhere	Gap
Environment	Small class size	72%	41%	31
	Location compared to home	80%	58%	22
	Campus size	59%	38%	21
	Size student body	49%	30%	19
Quality	Overall reputation of school	36%	54%	-18
	Reputation of specific major program	44%	59%	-15
	Quality of academics	61%	71%	-10
Flexibility	Availability of evening and weekend courses	25%	6%	19
	Ability to enroll part-time	20%	5%	15
	Ability to complete program in timely manner	55%	41%	14

The Same Pattern Occurs When Evaluating by Affinity to CSUCI, that is, Whether CSUCI Was a Top Choice School for Applicants

CSUCI Not a Top Choice School

Top enrollment factors

- Availability of specific major
- Quality of academics
- Career preparation

CSUCI is a Top Choice School

Top enrollment factors

- Availability of specific major
- Location compared to home
- Small class size



Less Affinity to CSUCI

More Affinity to CSUCI

“Availability of specific major” was a top enrollment factor across respondents regardless of where CSUCI ranked in their lists.

Majors of Interest to Admits Enrolled Elsewhere: Is there Opportunity for CSUCI to Develop Programs of Distinction?

Accounting/Information Systems	2%	Nursing	13%
Agriculture	1%	Political Science	2%
Art	1%	Pre-Med	1%
Biology	8%	Psychology	9%
Business	10%	Sociology	2%
Chemistry	1%	Spanish	1%
Communication	3%	Undecided	5%
Computer Science	1%	Other, please specify	23%
Education	2%		
Engineering	2%		
English: Literature and Writing	4%		
Environmental Science/Resource Management	1%		
History	3%		
Hospitality/Tourism	1%		
International Studies	1%		
Kinesiology/Exercise Science	1%		
Liberal Studies	5%		
Mathematics	1%		

Drivers that Relate to the Service Learning Mission Pillar are Most Relevant to Recruiting Messaging; Other Mission Pillars are not Strong Recruiting Messages, Although They are Relevant Mission Focus Points

Percentage Rating Feature as ‘Significant’ in Decision to Enroll: Mission Pillars and Related Enrollment Drivers		
Academic and/or Campus Feature	Current CSUCI Students	Admits Enrolled Elsewhere
University commitment to multicultural perspective	27%	23%
Ethnic/cultural diversity	25%	24%
Commitment to student needs and interests	49%	48%
Sense of community	45%	43%
University commitment to interdisciplinary courses	27%	20%
University commitment to service learning	26%	21%
Career preparation	61%	66%
Opportunity to conduct research with faculty	27%	16%
University commitment to global/int'l perspectives	24%	24%
Study/travel abroad	25%	31%

Less Significant Enrollment Drivers Should not be Focal Point Messages

Percentage Rating Feature as ‘Significant’ in Decision to Enroll		
Academic and/or Campus Feature	Current	Admits Enrolled Elsewhere
Study/travel abroad	25%	31%
Ethnic/cultural diversity	25%	24%
Availability of evening and weekend courses	25%	6%
University commitment to global/int'l perspectives	24%	24%
Ability to enroll part-time	20%	5%
Social opportunities in local communities	18%	24%
Extracurricular activities	13%	21%

Mid-tier Enrollment Drivers Should Not be Focal Point Messages

Percent Rating Feature as ‘Significant’ in Decision to Enroll		
Academic and/or Campus Feature	Current CSUCI Students	Admits Enrolled Elsewhere
Helpfulness of staff	49%	49%
Commitment to student needs/interests	49%	48%
Size student body	49%	30%
Faculty advising	46%	44%
Variety of courses in major program	46%	47%
Sense of community	45%	43%
Graduate school preparation	38%	40%
Character of students	34%	40%
Residence halls	28%	29%

There are Some Nuances in Drivers of Certain Student Segments

Adult Students

- Place more emphasis on:
 - Availability of specific major
 - One-third want ability to enroll part-time
 - One third want evening/weekend courses
- Place less emphasis on:
 - Size of student body
 - Campus setting
 - Sense of community
 - Extracurricular activities

Commuter Students

- Place more emphasis on:
 - Availability of specific major
 - Location compared to home
- Place less significance on:
 - Size of student body
 - Campus setting
 - Sense of community
 - Extracurricular activities
- Place less emphasis on flex options than one might think:
 - One quarter want part-time
 - One quarter want evening/weekend

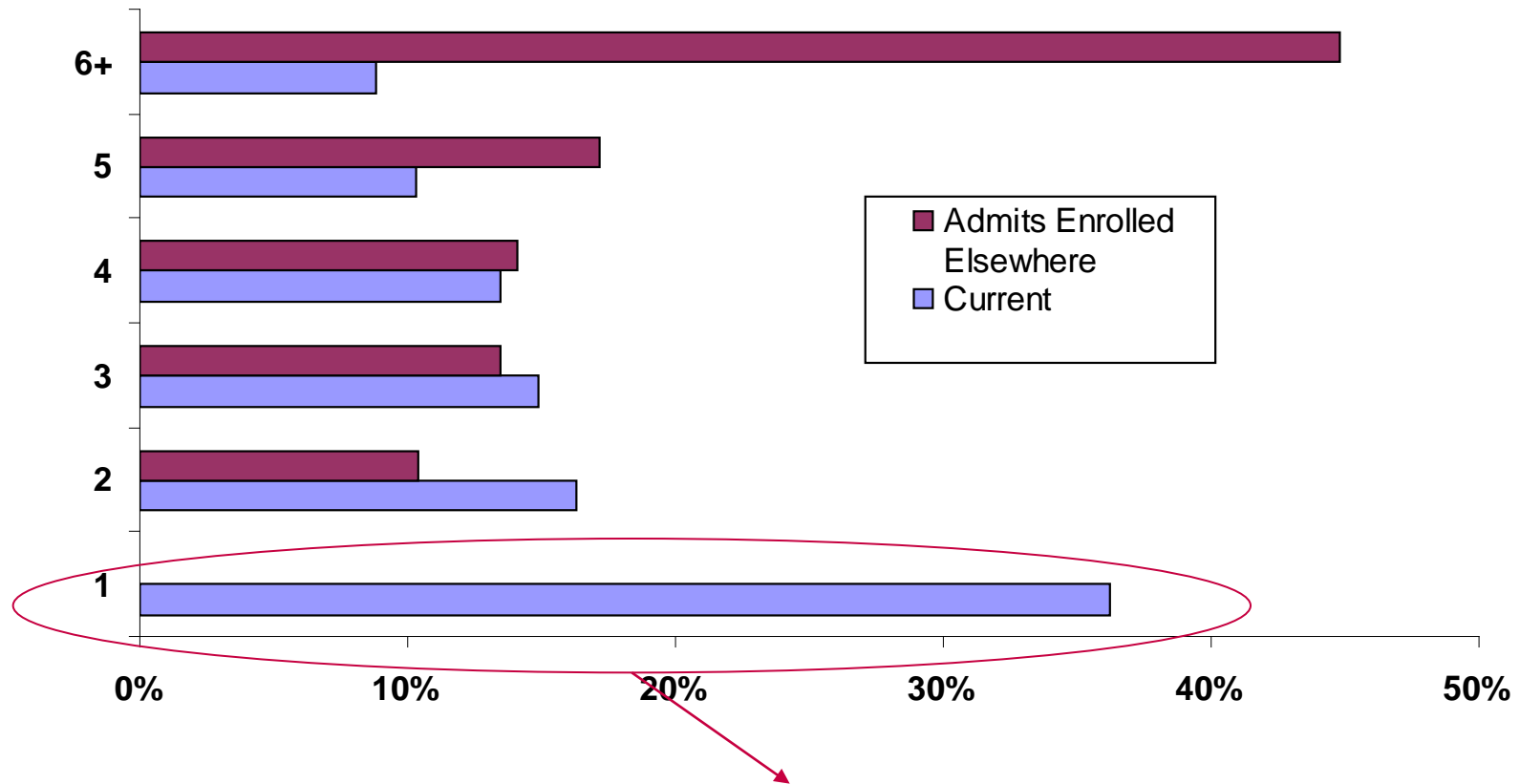
Latino/a Students

- Place more emphasis on:
 - Location compared to home
 - Quality of academics
 - Career prep
 - Cost
 - Ethnic and cultural diversity
 - Multicultural perspective
 - Service learning

Some nuances of marketing strategies could be distinct for each audience.

Majority of Admits Enrolled Elsewhere Apply to Four to Six Schools; Majority of CSUCI Students Apply to Three or Fewer

Total Number of Schools to Which Students Applied (Includes CSUCI)

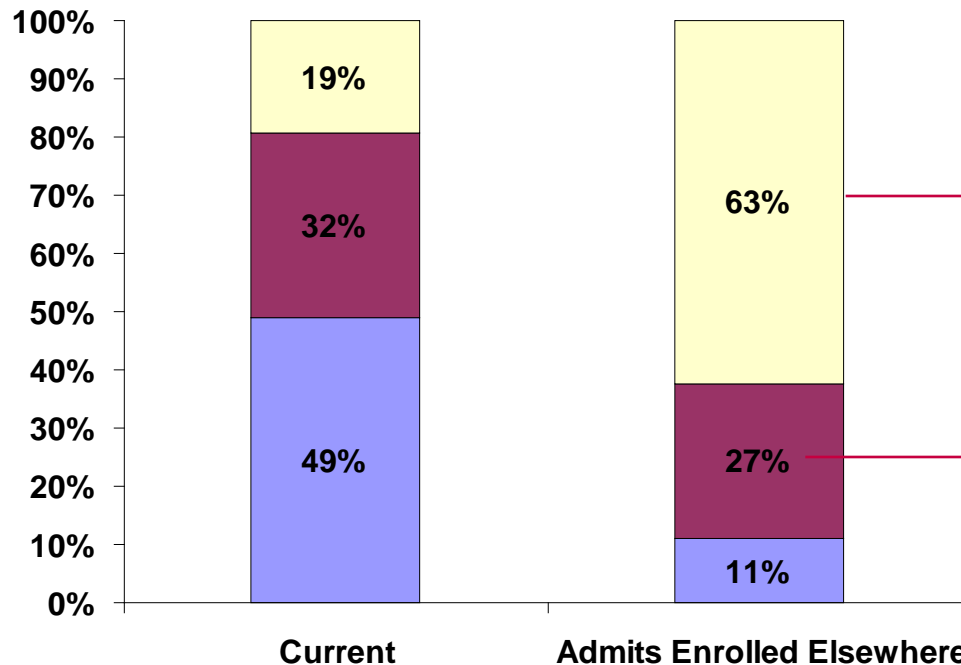


Goal could be to profile and target these folks.

Over 80% of Current Students Say CSUCI Was Their First or Second Choice Compared to 38% of Admits Enrolled Elsewhere

Where CSUCI Ranks in List of Institutions to Which Respondents Applied

■ CSUCI = 1st choice
 ■ CSUCI = 2nd choice
 ■ CSUCI not in top 2



This may be a "Reach Market", requiring more significant investment to attract

Goal is to message properly to win these folks, they are the "Next Target Market".

CSUCI can profile and target those with strong affinity to the school; aligning marketing with enrollment drivers can create stronger affinities with more students over time.

Let's Evaluate The "Reach" and "Next Target Markets"; "Next Target" Tends to be Adults, "Reach" Tends to be Traditional Student

	Reach Market	Next Target Market	Reliable Market
	Admits Enrolled Elsewhere/ CSUCI not a Top Choice	Admits Enrolled Elsewhere/ CSUCI is a Top Choice	Current Student/CSUCI is a Top Choice
Average age	19.6 yrs	23.1 yrs	22.3 yrs
Gender	Female = 74% Male = 26%	Female = 74% Male = 26%	Female = 78% Male = 22%
Average GPA	3.44	3.12	3.33
Latino market	26%	36%	24%
Employment	Full time = 5% Part time = 38% Not emp = 58%	Full time = 10% Part time = 50% Not emp = 40%	Full time = 14% Part time = 49% Not emp = 36%
Income (household)	< 100k = 52% 100-149k = 10% 150+k = 15%	< 100k = 67% 100-149k = 11% 150+k = 10%	< 100k = 58% 100-149k = 17% 150+k = 6%
Aware Quality Academics	59%	85%	97%
Aware Quality Career Prep	50%	65%	74%
	↓	↓	↓
	Traditional undergrad; stronger academically	Adult student, not as strong academically, price sensitivity, higher percent Latino	Adult student, price sensitive

These two items based on current student satisfaction.

Northridge and Long Beach are Top Cross-App Competitors, so CSUCI Strategy as it Relates to These Two Schools is Important

Current CSUCI Students Also Applied to:	
CSU Northridge	23%
CSU Long Beach	13%
UC Santa Barbara	11%
SDSU	10%
Cal Poly SLO	8%
Admits Enrolled Elsewhere Also Applied to:	
UC Santa Barbara	27%
CSU Long Beach	22%
CSU Northridge	21%
SDSU	19%
CSU Fullerton	14%

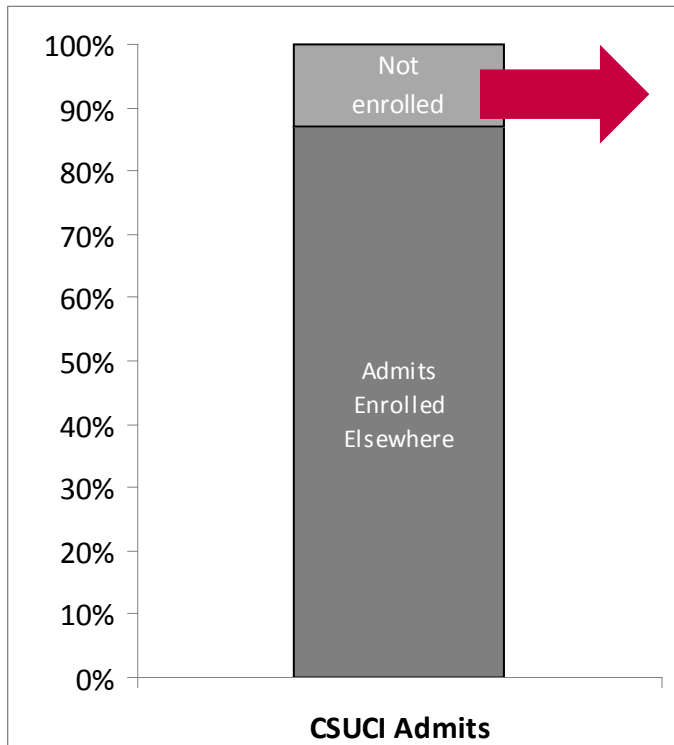
Differentiation from UC schools and others on this list is important. Certainly cost/value is one point. Additionally, do these schools do a good job of articulating career prep? Of messaging strongly to the adult market? Where can CSUCI message in ways that these schools do not?

The Majority of Non-Enrolling Admits Attend Northridge; CSU, UC, State Schools are Biggest Cross Admit Competitors

Schools that Admits Enrolled Elsewhere Attend	
Percent	School Name
8%	CSU Northridge
6%	Cal Poly State, SLO
5%	CSU Long Beach
5%	UCSD
4%	Moorpark College
4%	UC Santa Barbara
4%	UC Santa Cruz
3%	California Lutheran University
3%	California Poly Pomona
3%	San Diego State University
3%	San Jose State University

Over 50 competitor schools comprise the remainder of the list, with many only mentioned once.

Majority of Applicants Who Enrolled Nowhere Have Strong Affinity to CSUCI; Converting Requires Financial Aid and Campus Visits



Traits of Admits Not Enrolled Anywhere*

- Admitted but did not matriculate at CSUCI or any other school
 - 57% stated CSUCI = 1st choice
 - 17% stated CSUCI = 2nd choice
- Primary reason for not going to school: Financial (31%)
- Only 55% applied for financial aid (10%+ lower than current students or other AEEs)
- 44% did NOT visit the campus or attend any recruiting events; only 17% of current CSUCI students and 20% of admits enrolled elsewhere did not visit campus

*Small sample size of 29; can only give 'directional' information
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Inquirers Who did Not Apply are Generally Traditional Student, Converting them Could Help Balance out Male/Female Ratio

Inquirer¹ Demographics

- **Higher percentage of men** in this group than within current students (40% vs. 23%)
- **Less likely to be employed** (50% not currently employed¹)
- Income, age, race/ethnicity data points are vary similar to current students

Inquirer¹ Marketing Insights

- **More likely to have visited the website** (97% vs. 87%) and look for a specific academic program (46% vs. 37%)
- **More likely to say 'have not visited the CSUCI campus'** (50% vs. 17% current students)

Inquirer¹ Reasons for Not Applying to CSUCI

- Not my first choice of schools
- Proximity to family/work
- Cost/financial reasons
- Lack of activities in free time

¹Inquirers are those who expressed interest but never applied; small sample size of 38 therefore can only give 'directional' information

- What drives students to select CSUCI and the competition?
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Raising Awareness: CSUCI Will Benefit from Generating More Word-of-Mouth Buzz, Web Marketing, and Listing in Third-Party College Guides

How Students First Hear of Their Chosen School		
	Current	Admits Enrolled Elsewhere
Friends	36%	52%
Family	35%	38%
Web search	21%	36%
High school counselor	20%	28%
Community college counselor	16%	10%
Current students or alumni	13%	22%
High school teacher	12%	20%
Recruiter at your school or an event	10%	11%
Recruiting/marketing material	7%	13%
Advertising	7%	4%
Community college teacher	6%	1%
College guides produced by third party	3%	12%
Faculty/staff from the school	2%	5%

Focus group students reacted negatively to ads in restaurants, on TV, on buses. They indicate it gives a "career school" image instead of a "university" image.

Engaging Aware Prospects: Investments Should Focus on Leveraging Alumni, CSUCI-produced Materials and Listings in College Guides

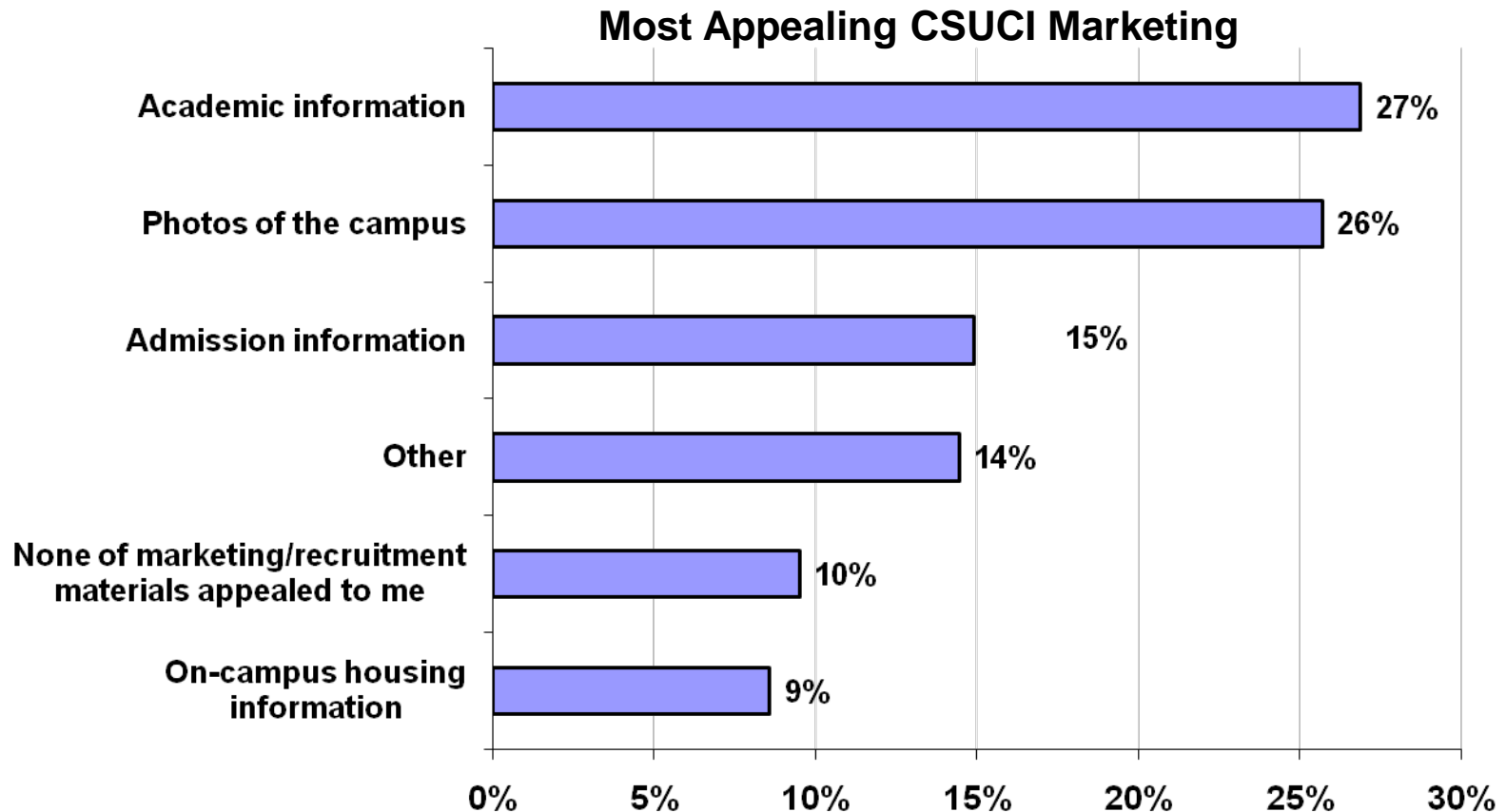
Percentage Rating Feature as 'Significantly Used' in Learning More About School		
Resource	Current	Admits Enrolled Elsewhere
Family	46%	40%
Web site for specific program	41%	44%
Institution's web site	39%	40%
Materials from institution	25%	31%
Friends	25%	35%
Current students/alums	15%	26%
Admissions office	14%	14%
Faculty or staff	13%	14%
Community college counselors	13%	7%
High school counselors	12%	12%
School recruiter	12%	6%
College guides	11%	25%
Other	9%	14%
High school teachers	9%	12%
Community college teachers	5%	2%

Focus group students corroborate, *"My family doesn't make the decision, but between them and my friends, they're the biggest influencers and information sources."*

Google Search and Texting are Among the Top Three Most Frequently Used Software/Services Across All Students

Percent of Students Regularly Using the Following Software/Services					
	18-22	23-29	30-39	40-49	50+
Google Search	85%	87%	87%	87%	88%
Texting	81%	81%	66%	51%	25%
Facebook	69%	47%	34%	13%	6%
iTunes	67%	48%	43%	31%	13%
YouTube	64%	54%	51%	49%	25%
MySpace	61%	48%	34%	8%	0%
Yahoo	50%	49%	56%	59%	50%
IM	41%	26%	23%	15%	13%
Gmail	22%	30%	26%	8%	6%
Google Video	7%	8%	2%	10%	6%
Twitter	2%	1%	2%	3%	0%
None of above	1%	1%	2%	0%	13%

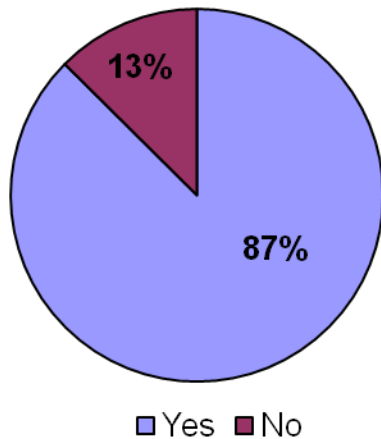
Academic Information and Campus Photos Are the Most Appealing Marketing/Recruitment Materials



This aligns with Eduventures benchmark research - students want to be able to easily find data regarding academics; their next priority is "getting a feel" for the institution, and photos of the campus that include unstaged student activity are highly attractive to prospective students.

The Majority of Students Visited CSUCI's Web Site and Had a Positive User Experience

Percentage of Respondents Who Visited the CSUCI Web Site



Percentage Agreeing With Statements About CSUCU Web Site			
Statement	Agree	Disagree	Don't Know
Homepage was easy to use	82%	5%	0%
Homepage content was up-to-date	74%	12%	1%
I was able to find the information I was looking for	77%	10%	0%

This can probably be improved by providing easy access to academic programs and admissions information, and ensuring that all the detail students seek is available on the site

Students Want Easy Access to Academic Program of Interest and Admissions Information on the Web Site

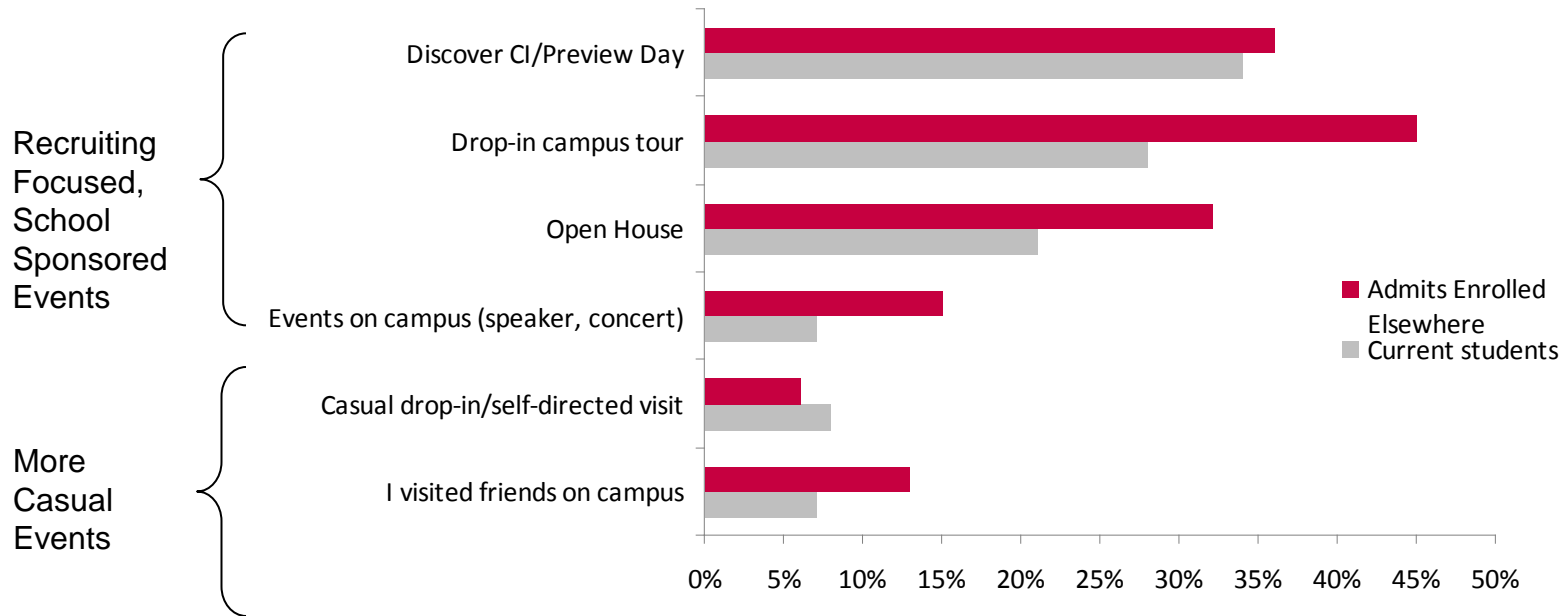
First Piece of Information Sought on Web Site by Percentage of Respondents	
Information	Percent
Specific academic program	34%
Admissions process and timeline	15%
I can't remember	14%
No response	13%
Financial aid and costs	9%
Campus life	7%
General academics	6%
Other	3%
Student body characteristics	1%

This is aligned with Eduventures benchmarking research which indicates that the top two items students look for on the Web site are:

- Admissions information
- Details about their academic program of interest

CSUCI Would Benefit from Attracting More Students to a Campus Visit

Percentage of Respondents Visiting Campus They Now Attend Before Enrolling



Of focus group students, only a few had visited CSUCI although three-quarters had visited other schools.

Eduventures benchmark research indicates that prospects "trust" what they see in campus visits more than they trust view books and the Web site. Best practice is to create frequent triggers to visit the campus on the Web site. The majority of institutions spend 5%-10% of their undergraduate recruitment budget on campus visit.

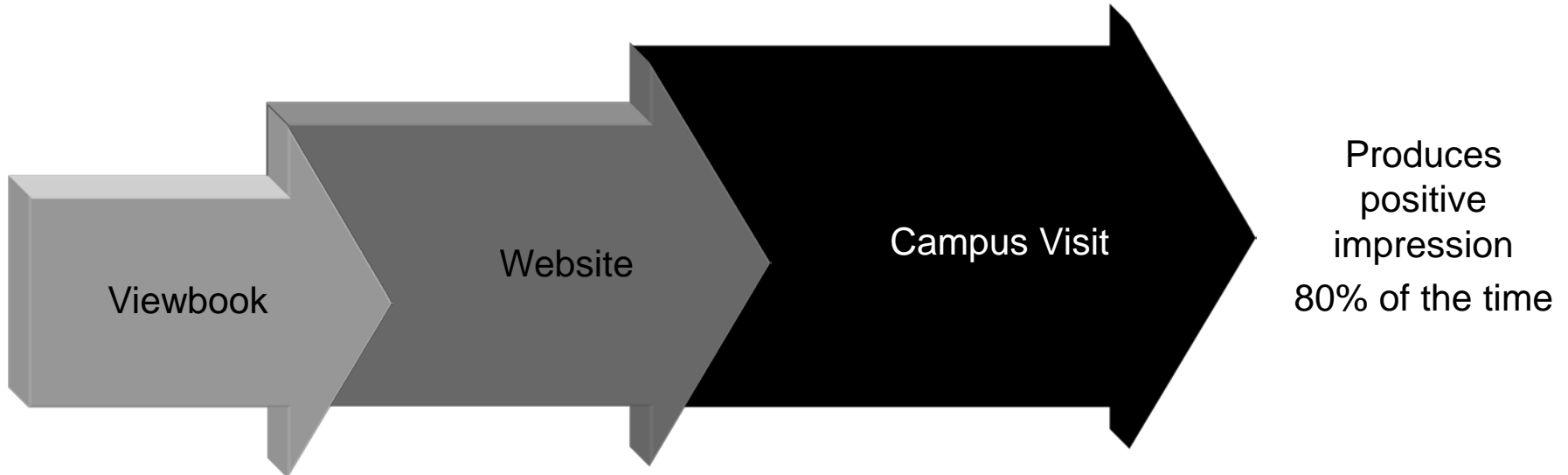
Viewbook and Website Should Drive Students Towards Campus Visit

Students¹:

64% Utilize
31% Trust

84% Utilize
55% Trust

64% Utilize
71% Trust



Parents²:

86% Utilize
61% Find useful

97% Utilize
87% Find useful

97% Utilize
92% Find useful

¹Source: Eduventures report: College Search and the Millennial Generation, 2008

²Source: Eduventures survey: Parent and Financial Aid Survey Report, 2008

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CSUCI Students are Satisfied with Key Enrollment Drivers; Next Step is to Move "Satisfied" to "Very Satisfied" in Some Areas

Student Satisfaction Rating of CSUCI With Top Enrollment Drivers					
Enrollment Drivers	Very Satisfied	Satisfied	Dis-satisfied	Very Dissatisfied	Don't Know
Location compared to home	69%	25%	3%	1%	1%
Availability of specific major program	49%	37%	8%	4%	2%
Small class size	72%	26%	2%	0%	1%
Quality of academics	47%	50%	2%	1%	1%
Campus size	66%	28%	5%	1%	1%
Setting/physical environment	65%	28%	4%	2%	1%
Ability to complete program in timely manner	43%	41%	7%	2%	7%
Faculty quality	47%	45%	6%	1%	1%
Quality of major program	38%	47%	4%	2%	9%
Quality of career prep/services	39%	35%	6%	2%	18%

When asked, "*What is the best part of attending CSUCI,*" students say: small classes, one-on-one interaction with faculty, sense of community at the school and being able to go to school close to home

Retention Could be Positively Impacted by Addressing Areas Where Students Show Some Dissatisfaction or Lack of Awareness

Most Significant Areas of Dissatisfaction or Inability to Rate Satisfaction with CSUCI		
	<i>% Dissatisfied or Very Dissatisfied</i>	<i>Don't Know (i.e. don't know enough to rate trait)</i>
Variety of courses in major	22%	--
Extracurricular activities	23%	30%
Social opportunities in local community	15%	31%
Four Mission Pillars	--	~28%

When asked, "*What is the most challenging part of attending CSUCI,*" students say: certain classes not offered frequently enough, lack of parking, lack of extracurricular activities

Although these areas did not factor significantly in students' decisions to enroll in CSUCI, they may gain in importance after enrollment. Many of these items can also help to create affinity to CSUCI among more prospects.

After Analyzing the Various CSUCI Constituencies, Several Recommendations Emerge in Marketing and Products

Final Recommendations	Marketing Changes	Product Changes
Create messaging around Quality and Career Prep	✓	?
Continue to invest in product suite	✓	✓
Consider serve distinct target markets in distinct ways (traditional student and adult learner)	✓	✓
Prioritize marketing/recruiting investments in: <ul style="list-style-type: none"> • Web marketing • Third party listings • Engaging alumni • Attracting prospects to visit campus 	✓	