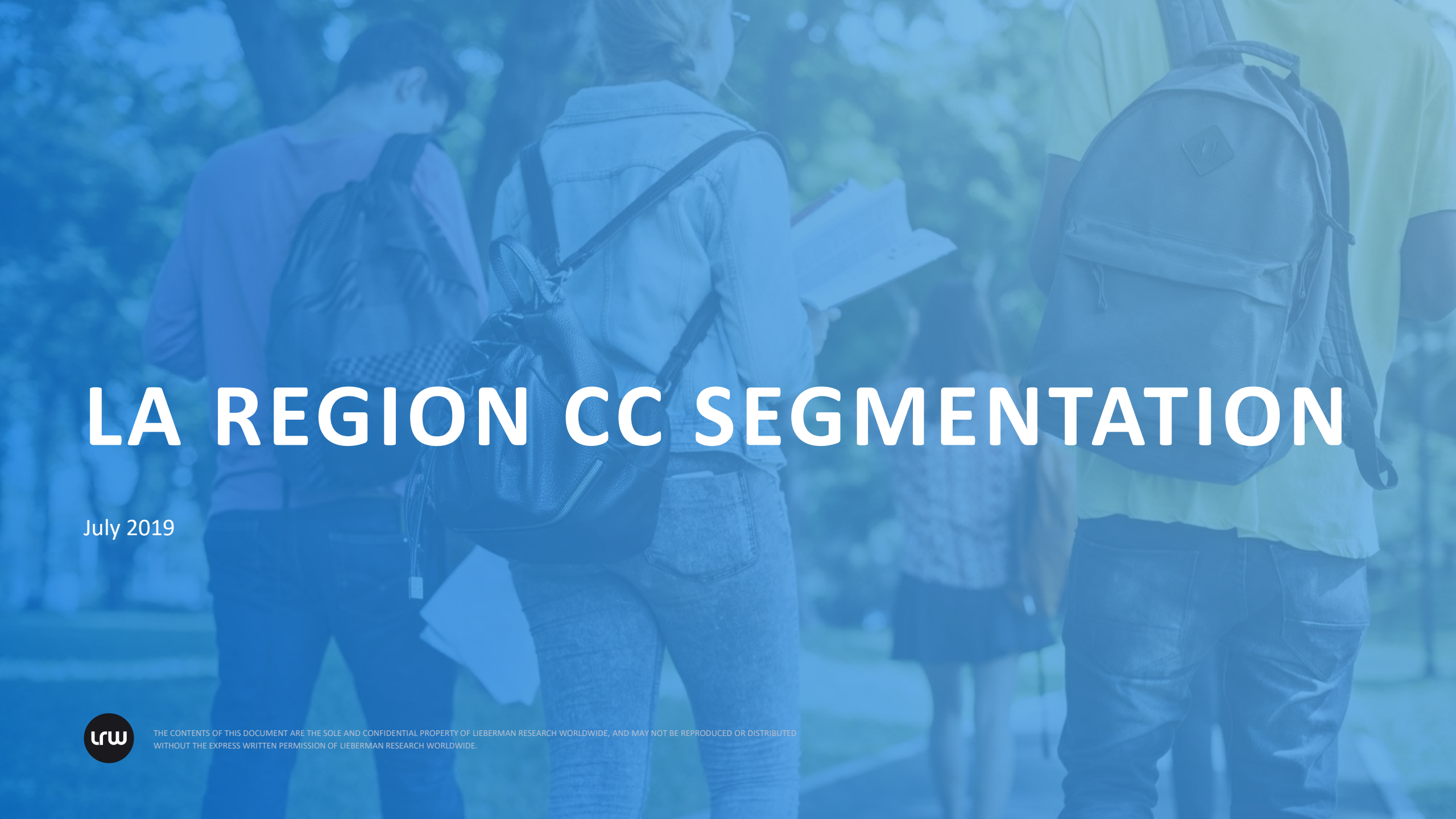

LA REGION CC SEGMENTATION

July 2019

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Background & Objectives

The 19 CCs are facing increased competition from online programs, 4-year Extensions, and job-focused trainings. Enrollment is dropping across the board, and they are looking to identify messaging, branding, and consumers to target to address the changing education landscape.

Overall Goal: Leverage consumer insights from research to inform strategy and innovation to lead to solutions that encourage more students to pursue “career education” at one of the 19 local community colleges

Research Objectives

Identify and create a new segmentation through differentiation, and new attributes/motivations

Create a new and improved typing tool for segment classification

Uncover which motivations and accompanying needs and preferences are central to seeking post-secondary education

Business Objectives

Create an attitudinal-based segmentation that identifies targetable segments in order to increase enrollment to LACC schools

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Chapter 1

OPPORTUNITY ANALYSIS

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In the context of LA 19's current offerings, Proud Pupils and Support-Seeking Graspers are clear targets.

	Economic Potential	+	Capturability	+	Strategic Alignment	=	Overall Opportunity Index
Status Seekers	131	+	57	+	107	=	**93**
Pragmatic Skillers	81	+	122	+	64	=	**91**
Doubtful Drifters	81	+	89	+	65	=	**79**
Support-Seeking Graspers	79	+	104	+	138	=	**110**
Proud Pupils	128	+	129	+	126	=	**128**

Economic Potential
If you win, how big is the pie? How much are they worth?

Capturability
How easy is it going to be to win?

Strategic Alignment
How well are each segment's needs aligned with your brand's future direction and positioning?

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Various metrics fed into each input for our opportunity analysis on current offerings.

ECONOMIC POTENTIAL	IMPORTANCE
Agreement with “I am looking for a longer term program” (P5)	■□□
Agreement with “Finances are not something I worry about” (P8)	■■□

STRATEGIC ALIGNMENT	IMPORTANCE
Agreement with “Most of my education comes from school” (P2)	■■■
Agreement with “Education is the best way to explore my passions” (P2)	■■□
Agreement with “Higher education is mostly about gaining skills to make a better life” (P2)	■□□
Agreement with “Getting a good job depends mostly on having the right education” (P2)	■■■
Intent to switch careers (Selected any codes 2-3 at S32)	■□□
Agreement with “I’m concerned that my job or future job could be automated” (P8)	■□□

CAPTURABILITY	IMPORTANCE
Stereotyping Exercise: Strong agreement with Community colleges are “worth the investment” (P6)	■■■
Current enrollment in LACC (Selected any codes 1-19 at S17)	■■□
Has previously attended a community college (Selected code 1 at S22 or D2)	■□□
Considered enrolling at a community college after high school (P3)	■□□
Agreement with “Community college is a great fit for me and my needs” (P12)	■■■
Certificate from a community college is essential in achieving professional goals or dreams (Selected code 1 at P7)	■■■
Positive feelings towards community college (Selected codes 1-6 at P1 for community college)	■■□
Agreement with “I would be happy to get all of my education from a community college” (P12)	■■■
At least researched post-secondary options (Selected any codes 3-4 at S28)	■□□

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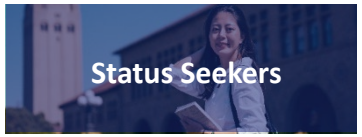
Proud Pupils and Support-Seeking Graspers show the most opportunity for LA 19.

These segments have the greatest alignment with LA 19's current offerings, and are capturable as well due to their favorable views of community college.

HIGH MED LOW	ECONOMIC POTENTIAL	+	STRATEGIC ALIGNMENT	+	CAPTURABILITY	=	OVERALL OPPORTUNITY INDEX
 Status Seekers		+		+		=	
Pragmatic Skillers		+		+		=	
Doubtful Drifters		+		+		=	
Support-Seeking Graspers		+		+		=	
Proud Pupils		+		+		=	

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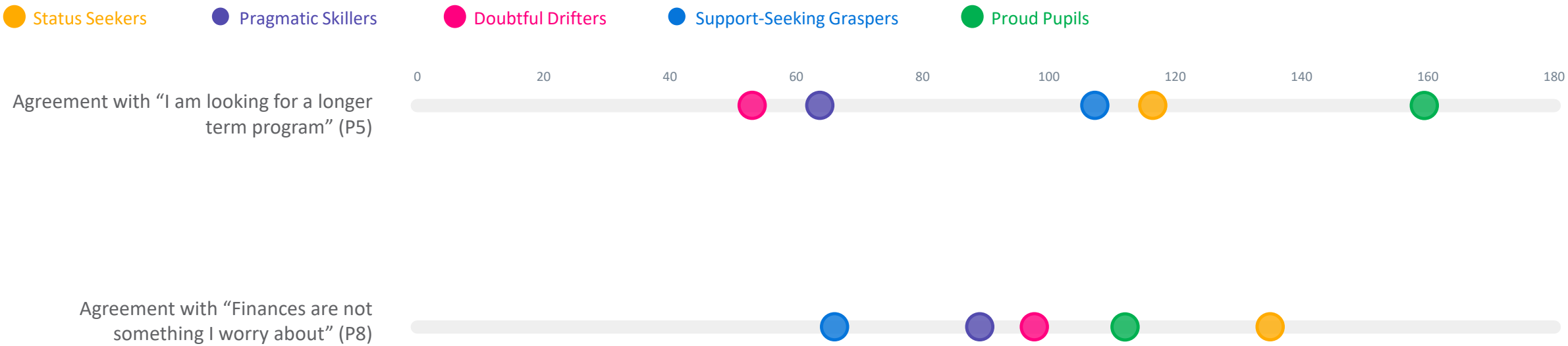
Status Seekers and Proud Pupils have the highest economic potential for the traditional community college offering.

Economic potential counts for less of the final opportunity score due to the general targets of Community Colleges.

ECONOMIC POTENTIAL



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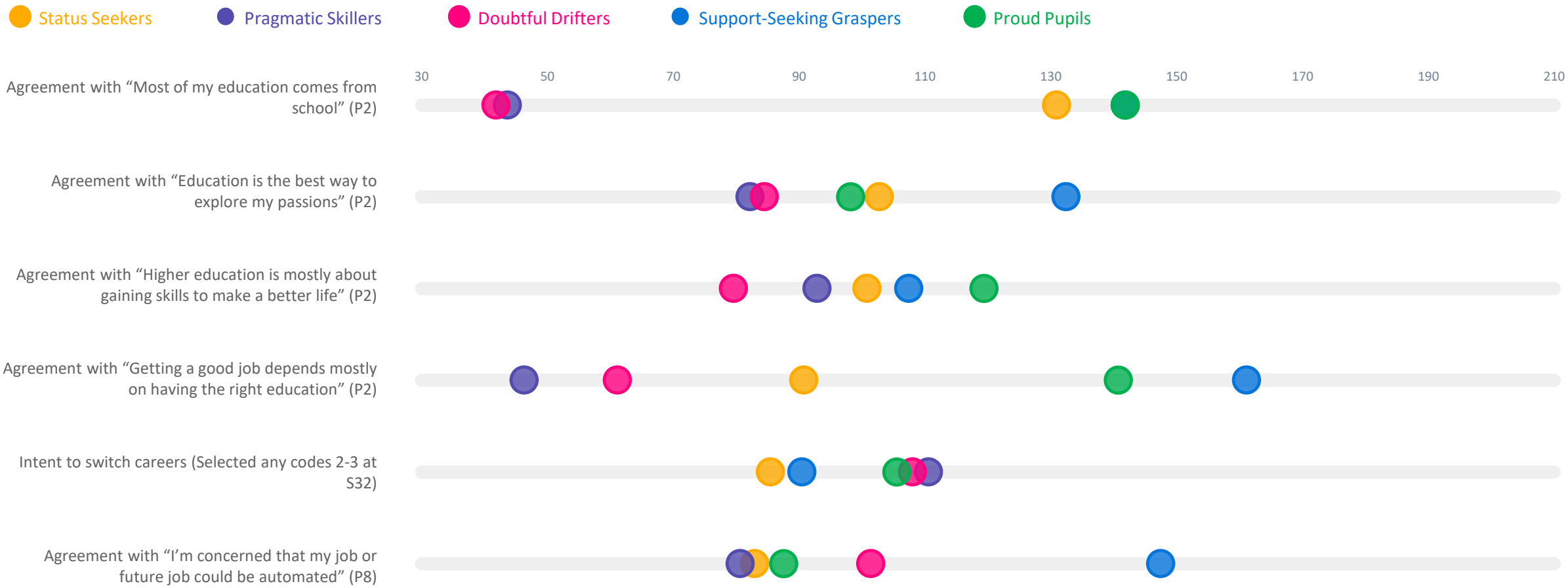
Because of their views on education, Support-Seeking Graspers and Proud Pupils are most strategically aligned for growth.

STRATEGIC ALIGNMENT



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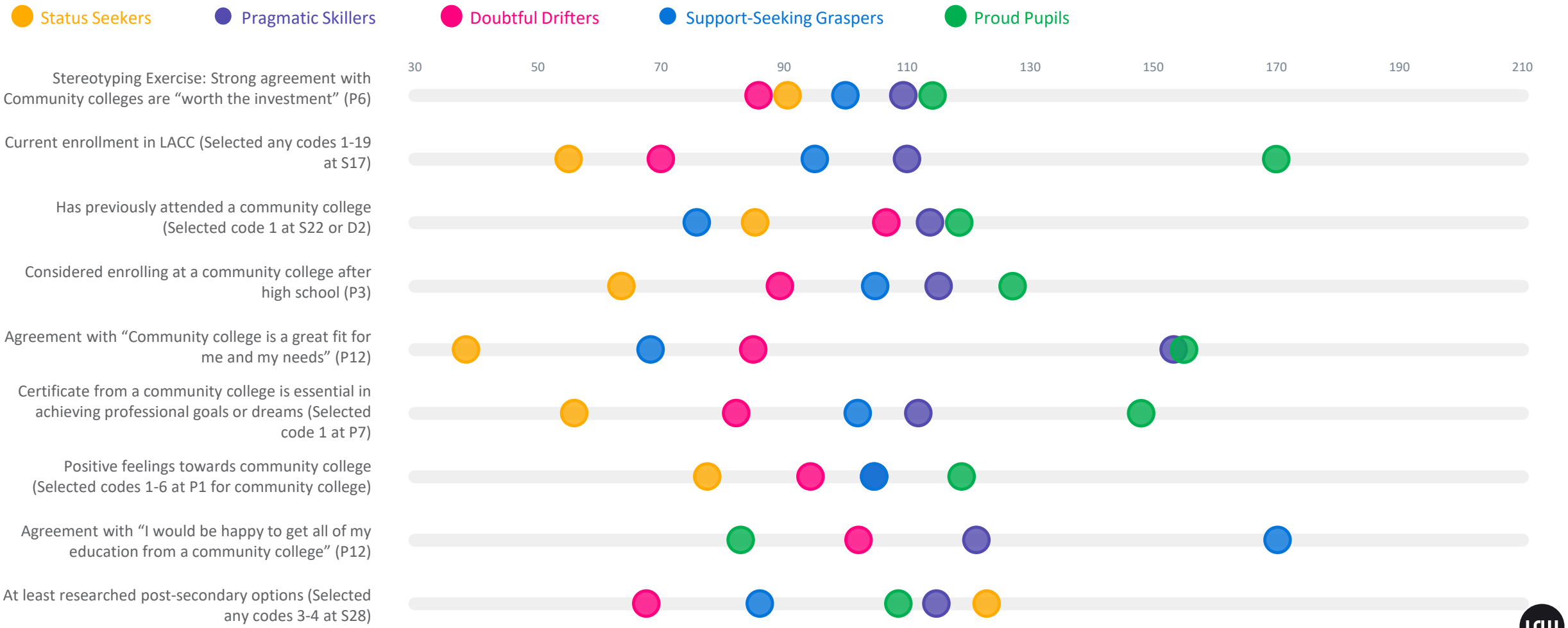
Proud Pupils and Pragmatic Skillers are also capturable, as they're most open to getting their education from community college.

CAPTURABILITY



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By adding an online offering, LA 19 can also grow by attracting Pragmatic Skillers.

This group is characterized by its preference for online, self-driven courses, as well as openness towards community college.

ECONOMIC POTENTIAL	IMPORTANCE
Agreement with "I am looking for something to get quick experience" (P5)	■■■
Agreement with "Finances are not something I worry about" (P8)	■■□

STRATEGIC ALIGNMENT	IMPORTANCE
Agreement with "Flexibility in my schedule is most important" (P5)	■■■
Agreement with "It doesn't matter who I'm learning with as long as who I'm learning from is an expert" (P2)	■■■
Agreement with "I prefer to start and stop a class at my own pace" (P5)	■■■

CAPTURABILITY	IMPORTANCE
Agreement with "I would prefer to take classes online" (P8)	■■■
Stereotyping Exercise: Strong agreement with Community colleges are "worth the investment" (P6)	■■■
Current enrollment in LACC (Selected any codes 1-19 at S17)	■■□
Has previously attended a community college (Selected code 1 at S22 or D2)	■□□
Considered enrolling at a community college after high school (P3)	■□□
Agreement with "Community college is a great fit for me and my needs" (P12)	■■■
Certificate from a community college is essential in achieving professional goals or dreams (Selected code 1 at P7)	■■■
Positive feelings towards community college (Selected codes 1-6 at P1 for community college)	■■□
Agreement with "I would be happy to get all of my education from a community college" (P12)	■■■
At least researched post-secondary options (Selected any codes 3-4 at S28)	■□□

Bolded statements are unique to this version of the opportunity analysis.

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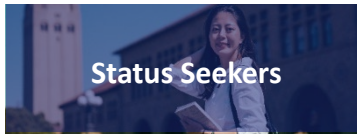
Beyond attracting Pragmatic Skillers, an online option is also likely to be used by Support-Seeking Graspers as well as Proud Pupils.

HIGH MED LOW	ECONOMIC POTENTIAL	+	STRATEGIC ALIGNMENT	+	CAPTURABILITY	=	OVERALL OPPORTUNITY INDEX
 Status Seekers	🟠	+	🟠	+	🔴	=	🔴
Pragmatic Skillers	🔵	+	🟠	+	🔵	=	🔵
Doubtful Drifters	🔵	+	🟠	+	🟠	=	🟠
Support-Seeking Graspers	🔴	+	🟠	+	🟠	=	🟠
Proud Pupils	🔴	+	🟠	+	🔵	=	🟠

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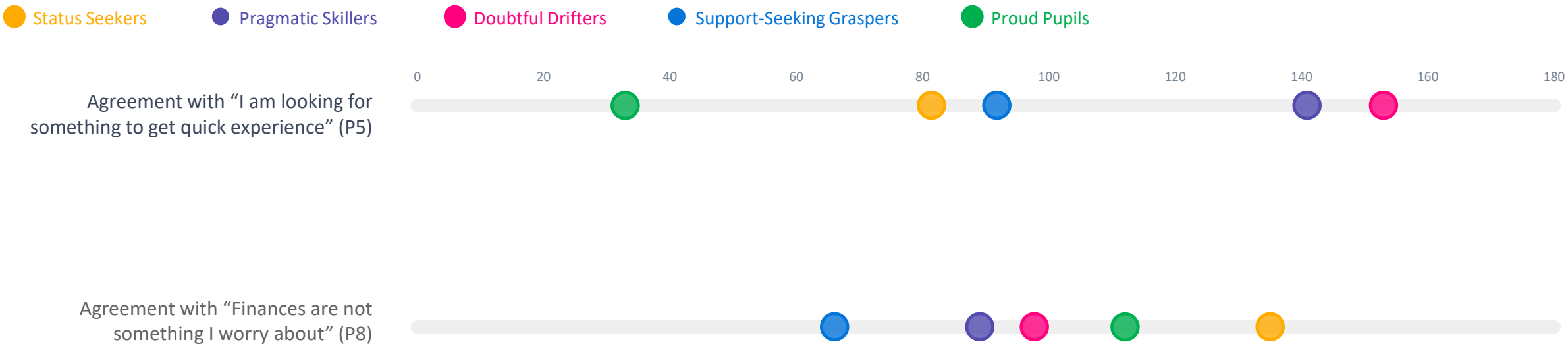
Pragmatic Skillers have high interest in something that will give them quick experience.

Economic potential counts for less of the final opportunity score due to the general targets of Community Colleges.

ECONOMIC POTENTIAL



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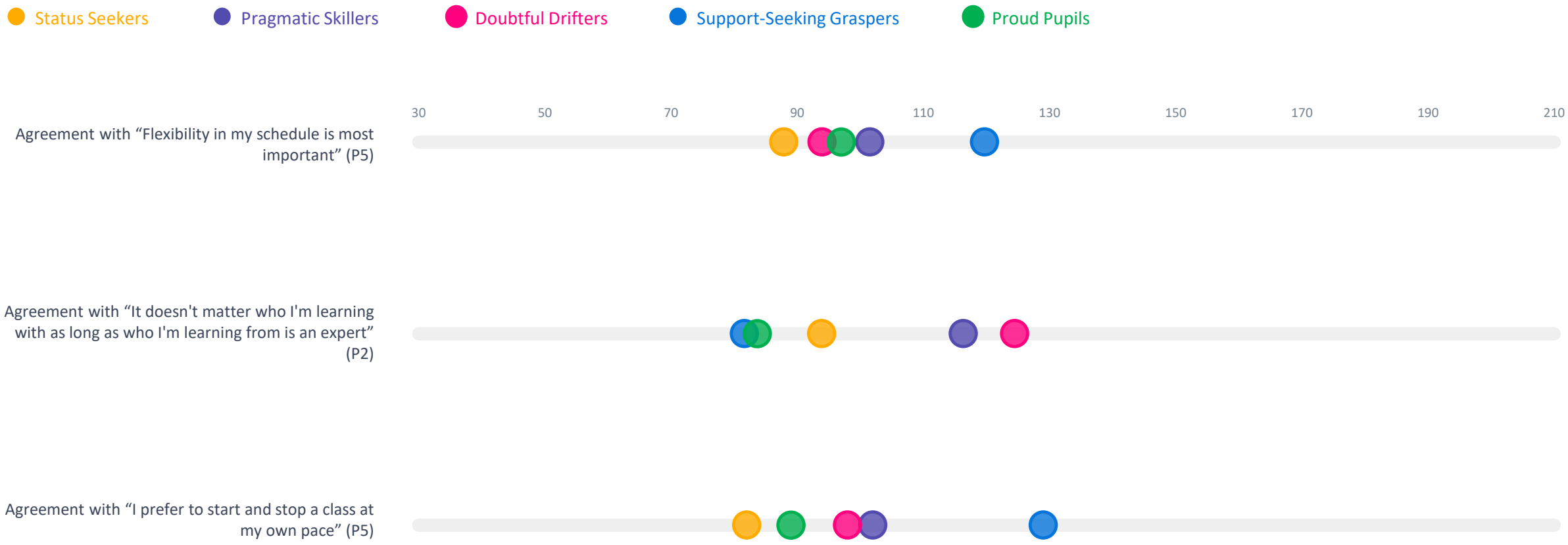
Because of their views on education, Support-Seeking Graspers and Proud Pupils are most strategically aligned for growth.

STRATEGIC ALIGNMENT



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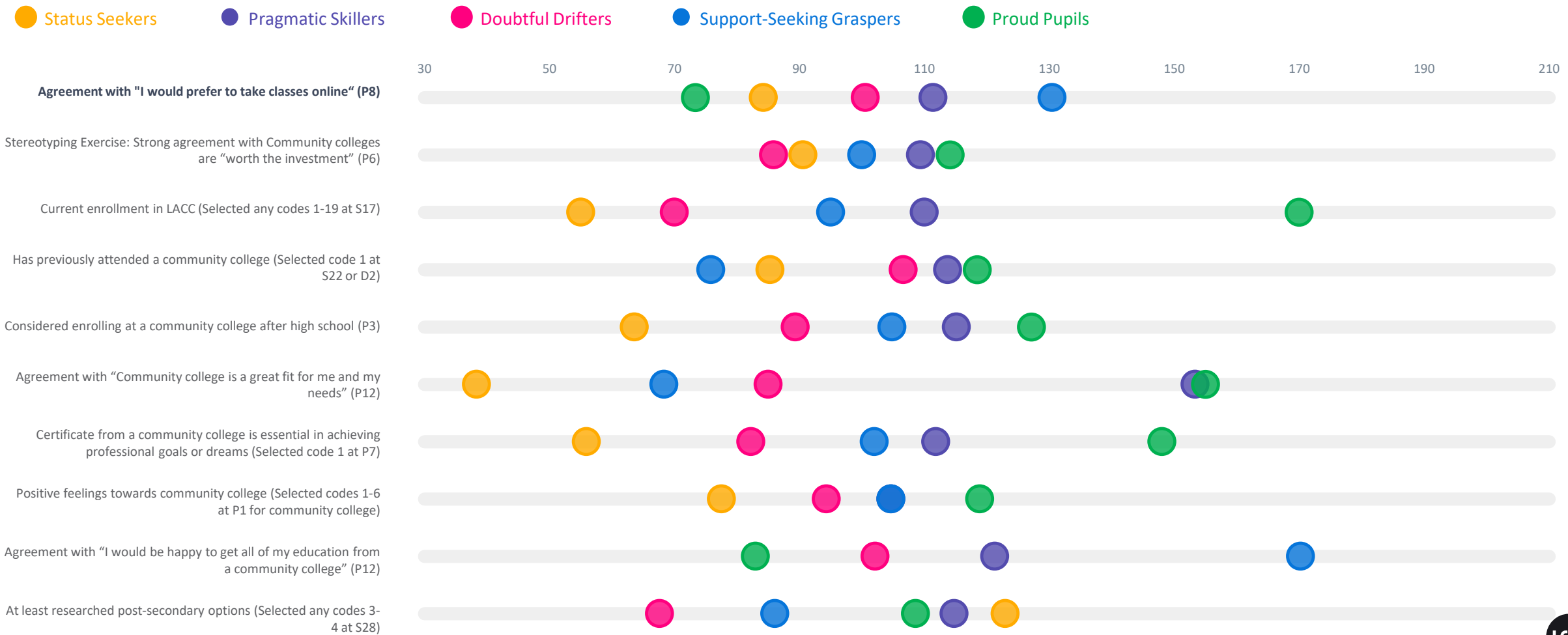
Because of their preference for online classes, Pragmatic Skillers are a prime target for a more-developed online offering.

CAPTURABILITY



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Chapter 2

MEET THE SEGMENTS

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We have identified five segments within the market for higher education.

Status Seekers are focused on one thing: a degree. They have a clear vision of what they want to do with their degree and how to get there, and are willing to pursue it no matter the cost.

Status Seekers are **not** a target for LA 19, though some will go through the CC system as determined transfer students.

Pragmatic Skillers are more about the results than the journey: if they can skip the formal education pathway, they will. They see that most of their education comes from outside of school, and have a focus on learning, not just grades.

Pragmatic Skillers are a ***future*** **target** for LA 19.

Doubtful Drifters are unclear on where they want to go in life, and are skeptical if higher education is even the way to get them there. They feel that they are too busy in their life with other things to make education a priority.

This group is **not** a target for LA 19.

Support-Seeking Graspers are looking for flexible schedules to fit their busy life, consistent support from their counselors, and one-on-one attention from professors to help ensure their success.

Support-Seeking Graspers are a ***current*** **target** for LA 19.

Proud Pupils are community college cheerleaders: They're proud to attend, and know that they fit in with everyone who goes there.

Proud Pupils are a ***current*** **target** for LA 19

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LRW Segmentation Process

Our segmentation process is extremely rigorous from a quantitative and statistical perspective. On the other hand, it is also highly intuitive and flexible in its interpretation and application.

Review & Exploration

Develop bi-polars and other forced choice constructs to capture and help distinguish between key groups on their beliefs, attitudes, and motivations for seeking post-secondary education

Multivariate Segmentation

A variety of techniques are used to maximize the robustness and reproducibility of the results

A set of situational rules is developed to ensure that minimum standards are met or exceeded

Evaluation Of Alternatives

LRW Marketing Science team evaluates a wide range of solutions

Project team examines the most promising

If necessary, additional “rounds” conducted

Selecting Final Segmentation Solution

The best alternatives are presented today!

Together, we all immerse ourselves in the data and evaluate the options

Outcome

An intuitive segmentation scheme that is insightful and actionable

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Proud Pupils

Proud Pupils are community college cheerleaders: They're proud to attend, and know that they fit in with everyone who goes there. They know that professors at community colleges are just as good as at the larger schools and that they have something to offer to people regardless of where they are in their career.

Proud Pupils **are a *current* target** for LA 19, as it makes up a sizable portion of those currently attending community colleges. They are advocates for the community college experience and are using it as a stepping stone to transfer to a four-year program.

This group has high aspirations and is willing to work to reach them. Attract them with longer-term programs that include supportive professors with real-world experience. Proud Pupils also show a preference for online courses, but aren't currently taking them, implying the need to refresh and update online offerings to provide the courses that they need.

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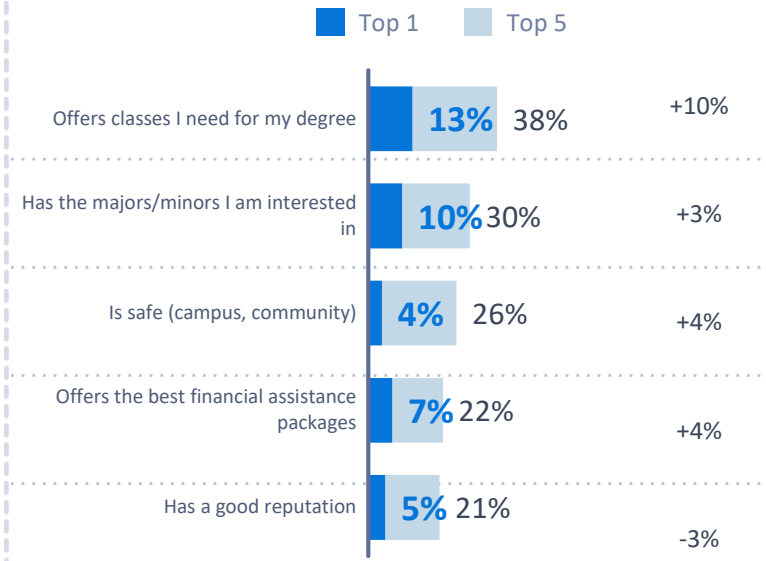
Proud Pupils see the value in higher education and the doors it can open. These are mostly transfer students or students seeking an Associate's degree.

Key Attitudes About Education

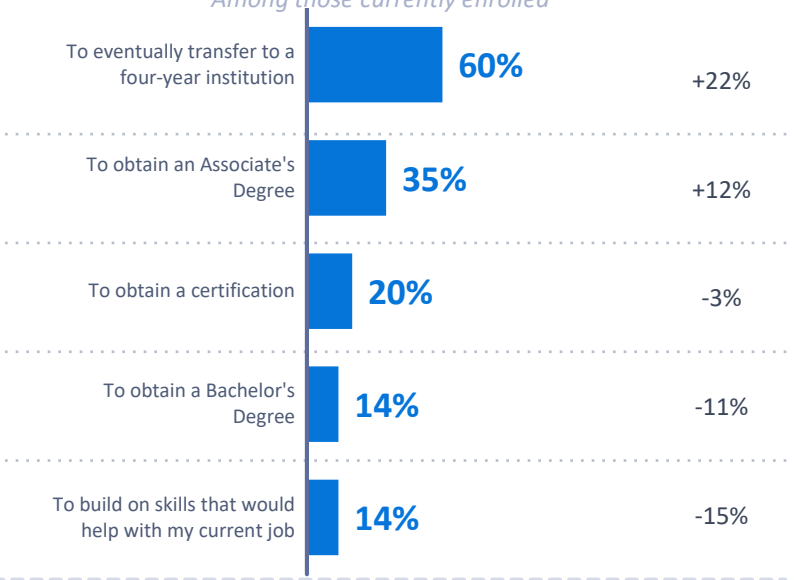
Most of my education comes from school	78%	(+23%)
Getting a good job mostly depends on having the right education	76%	(+21%)
I have a clear vision of what I would do with a degree	86%	(+20%)
I like to collaborate when learning	71%	(+19%)
I take my education very seriously	93%	(+15%)
Higher education is mostly about gaining skills to make a better life	90%	(+14%)
I would only be happy with my education if I completed a degree	85%	(+13%)
The most important things to learn are taught outside of school	53%	(-11%)
I care about my education because I think it is very important	86%	(+10%)
As long as the information is there, the way it's presented to me doesn't matter	71%	(+10%)

Top Considerations

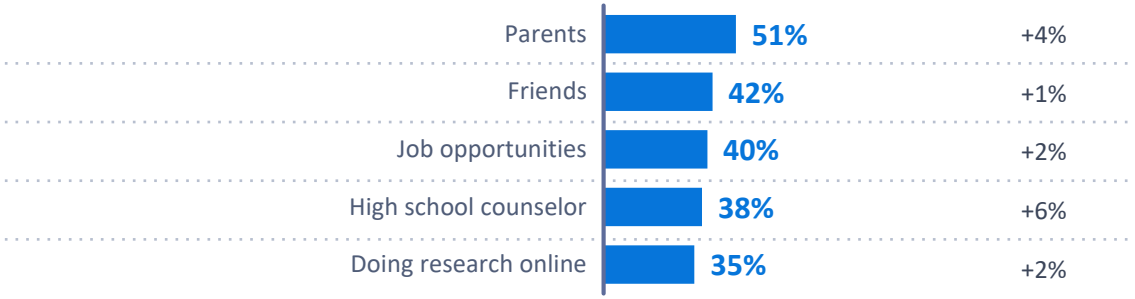


Top Reasons For Taking Classes

Among those currently enrolled

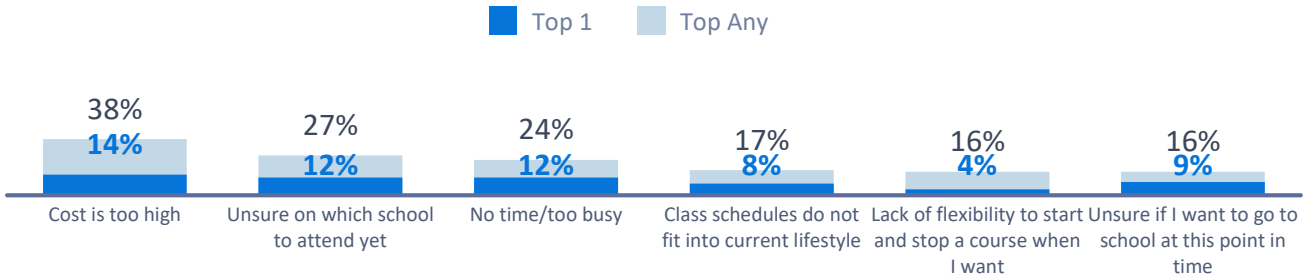


Decision sources



Top Barriers

Among those not currently enrolled



Percentages + or – are comparisons versus total sample.

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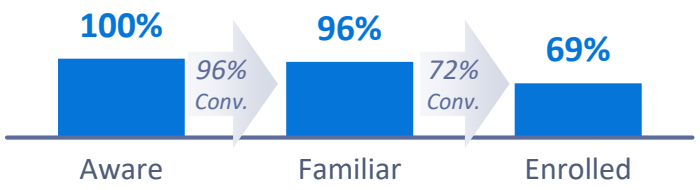
Proud Pupils are already fans of CCs and are proud to go there. They see it as a place that can help people at various stages in their career, and know they fit right in.

Community College Awareness



Considered Enrollment

74%

(+16%)

Currently Enrolled in CC

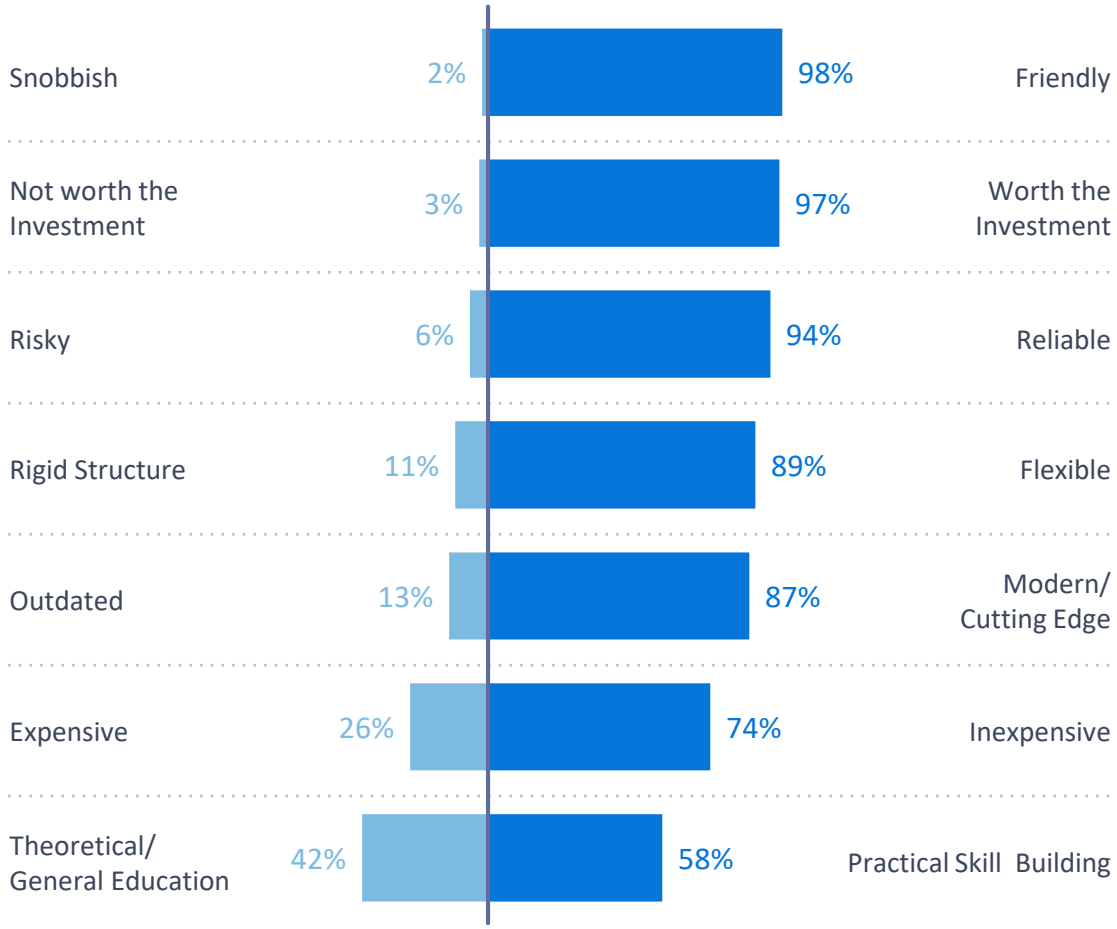
37%

(+15%)

Community College Perceptions

I would be proud to tell others I go to community college	**95%**	(+34%)
Community college is a great fit for me and my needs	**93%**	(+33%)
I think I would fit right in with the kinds of students that go to community college	**94%**	(+30%)
Community colleges can help people at various stages in their careers	**95%**	(+18%)
Community college professors are just as good as they are at bigger schools	**91%**	(+18%)
Community college caters to a wide variety of interests	**89%**	(+16%)
I had/have a pretty good idea of what community college is all about	**91%**	(+9%)
I would use community college as stepping stone to a better school	**61%**	(+7%)

CC Word Associations



Awareness of community college was a requirement to enter the study. Percentages + or – are comparisons versus total sample.

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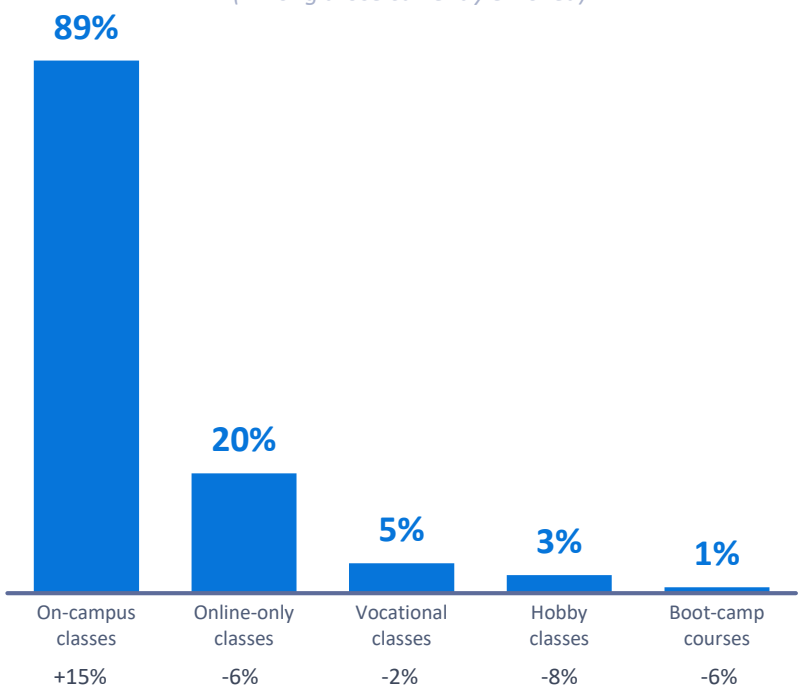
As fans of more traditional education, Proud Pupils opt for long-term programs that are focused on a degree. However, there is some preference for online courses.

School Specifics

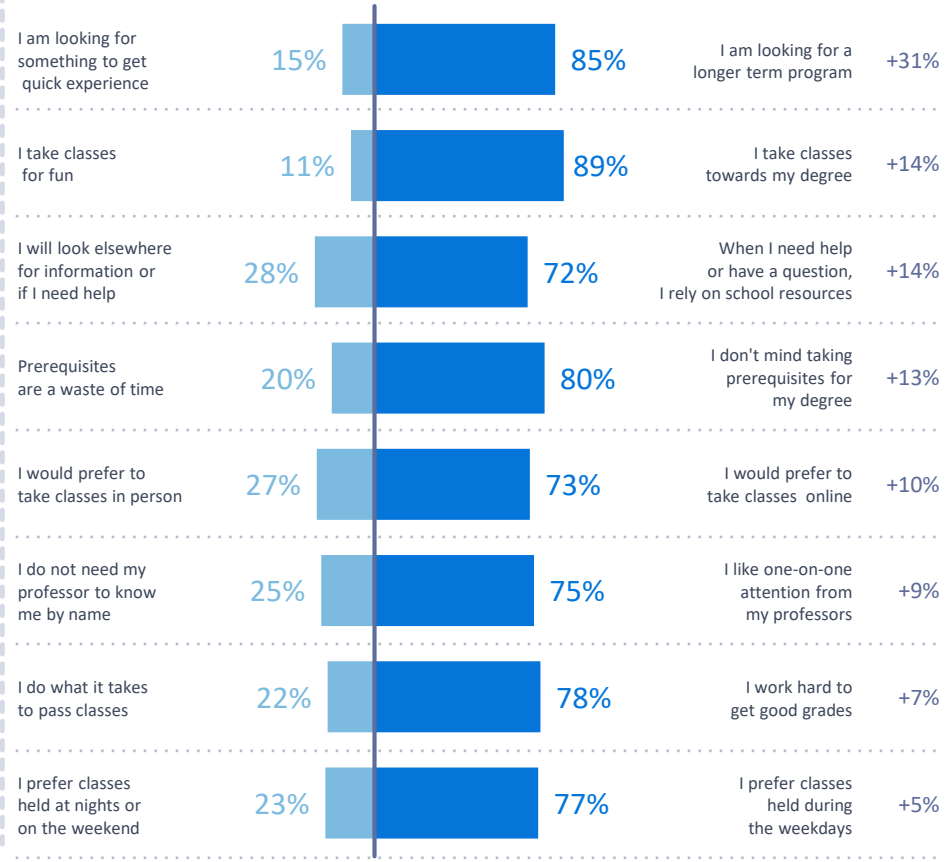
52% Currently Enrolled in education

Types of Classes

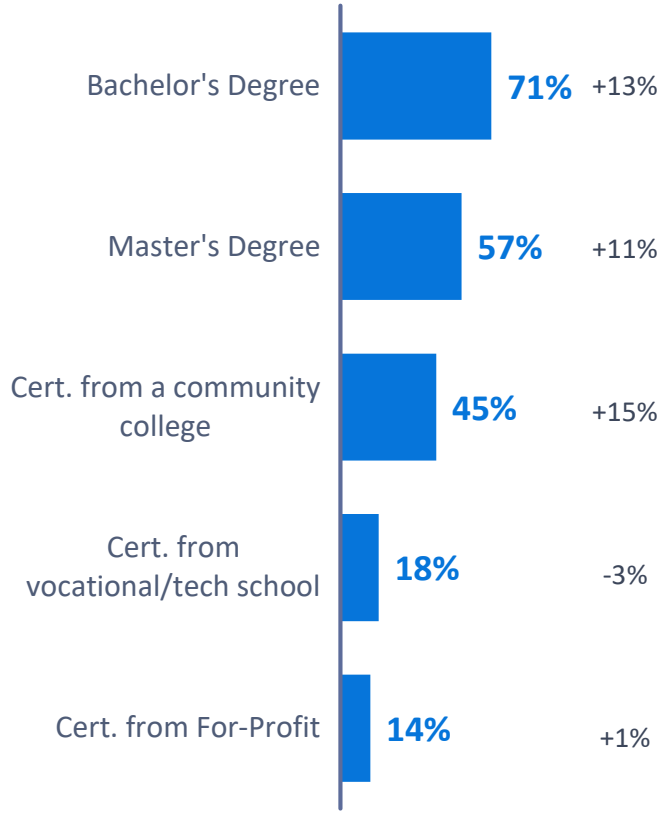
(Among those currently enrolled)



School Preferences



Essential Degree



Percentages + or – are comparisons versus total sample.

Proud Pupils

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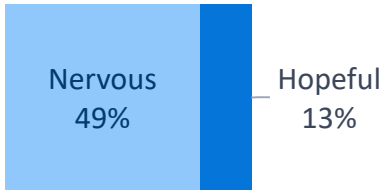
Proud Pupils are not yet stressed about automation, and many of them are interested in or pursuing careers in health services.

Automation & Strong Workforce

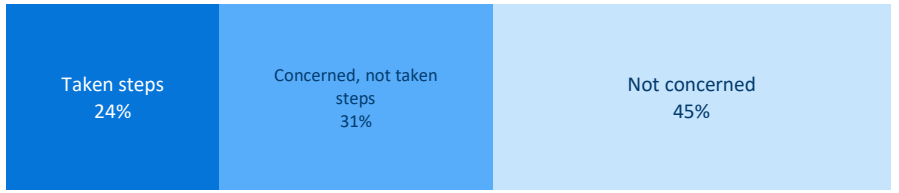
49% (-6%) Aware of Automation

34% (+5%) In Automation-Risky Jobs

How does Automation make you feel?



Actions Against Automation



Top 3 Considerations for Major

32%	Passion/Interests
22%	Potential Salary
11%	Work-Life Balance

Top 3 Program Interest

44%	Health Services
41%	Entertainment & Digital Media
32%	Information & Communications Technology

Top 3 Industry Pursuing

(Among those currently enrolled)

23%	Health Services
15%	Social Sciences
11%	Business

Percentages + or – are comparisons versus total sample.

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Proud Pupils skew younger, but have a clear idea of what their passions are. This group is largely Hispanic and skews lower income.

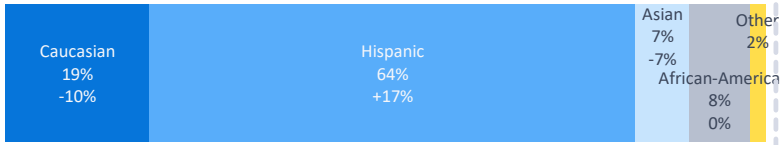
General Attitudes & Demos

Lifestyle

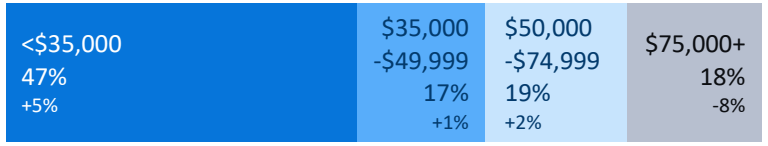
I have a clear idea of what my passions are	71%	(+19%)
I have a strong support system in my life	82%	(+13%)
I think everyone is responsible for their own good fortune	76%	(+11%)
People depend on me	75%	(+8%)
Success is more about working smarter	53%	(-8%)
I'm willing to make sacrifices today to have a better life in the future	88%	(+7%)
I make it a point to focus on my own needs	60%	(+7%)
I know that my job won't be automated	62%	(+5%)
It's important to make a good impression on others	51%	(+4%)
I struggle to make ends meet	61%	(-4%)

Age

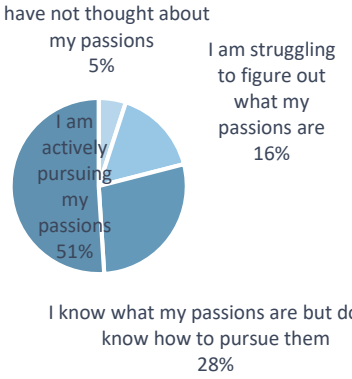
Ethnicity



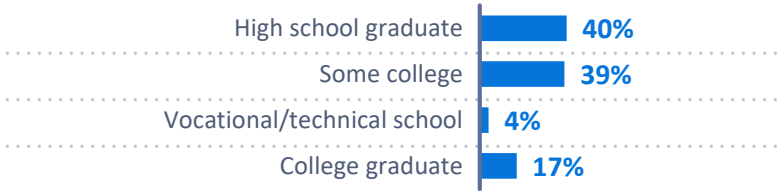
Income



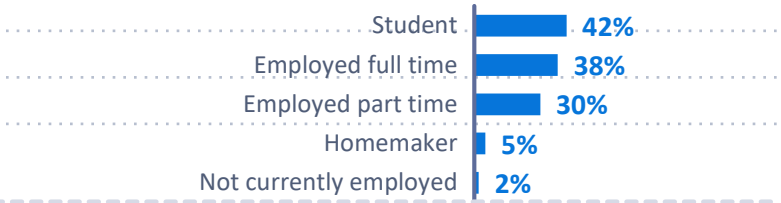
Passion



Education



Employment



Gender

Male	45%
Female	54%

Parents

24%

Household Size

3.7

of People Financially Support

1.3

Unhoused (Living situation)

10%

Percentages + or – are comparisons versus total sample.

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Support-Seeking Graspers

Support-Seeking Graspers are looking for flexible schedules to fit their busy life, consistent support from their counselors, and one-on-one attention from professors to help ensure their success.

Support-Seeking Graspers **are a *current* target** for LA 19, as these students are currently attending or are generally open to attending community colleges. However, this group has some level of risk built in due to the support network required to ensure their success.

To help retain and provide for these students, LA 19 should identify these students and ensure that they get the support they need. Targeted counseling that supports both their school and personal lives will go a long way toward retention. Additionally, LA 19 should provide ways to help them identify their passions and how to pursue them in order to further promote resonance with the community college brand.

These students are more aware and worried about the future of automation. Help quell their fears by offering “future-proof” programs (ideally certificates or shorter-term) with job placement prospects. As this group is lower-income and more cost-averse, implement novel payment plans (such as a percentage of their paycheck after starting their career, or other deferred-cost programs) to help support them in their goals.

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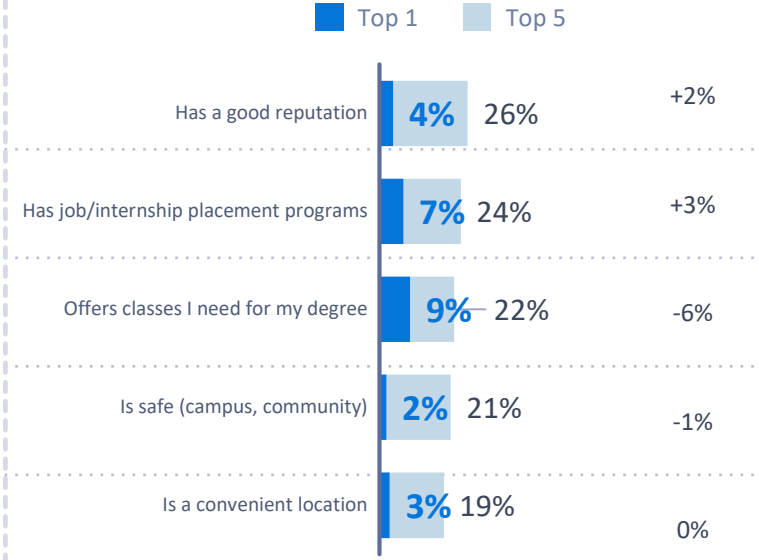
Support-Seeking Graspers place a high value on having the right education to get a job, but recognize that much of their education comes from outside of school. They see the value in a real-world education over a theoretical one.

Key Attitudes About Education

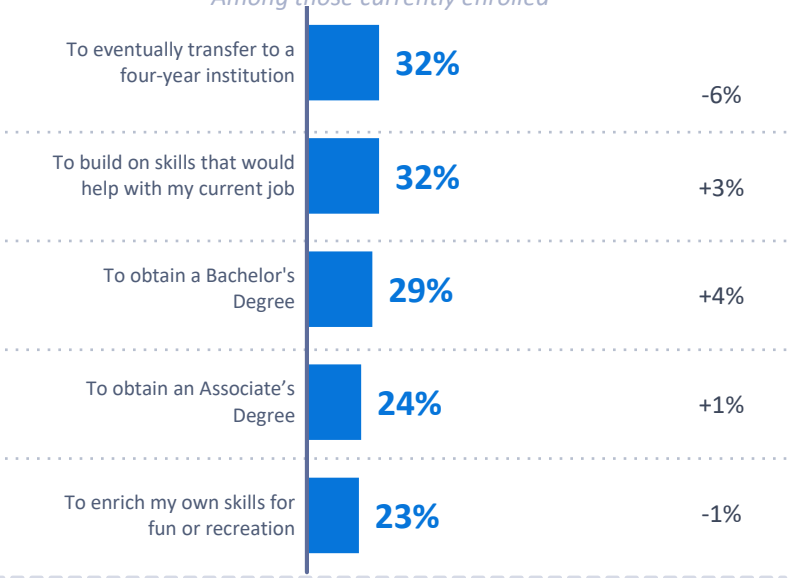
Getting a good job mostly depends on having the right education	87%	(+32%)
Most of my education comes from ways other than school	78%	(+23%)
I like to collaborate when learning	70%	(+18%)
Education is about learning real-world skills	69%	(+17%)
My education will keep going even long after I finish school	53%	(-16%)
Financial aid is a must for me to consider a degree	82%	(+15%)
Education is the best way to explore my passions	58%	(+15%)
When it comes to education, I'm more concerned about getting good grades	56%	(+15%)
I would only be happy with my education if I completed a degree	86%	(+14%)
My education experience depends on how good the teachers are	56%	(+14%)

Top Considerations

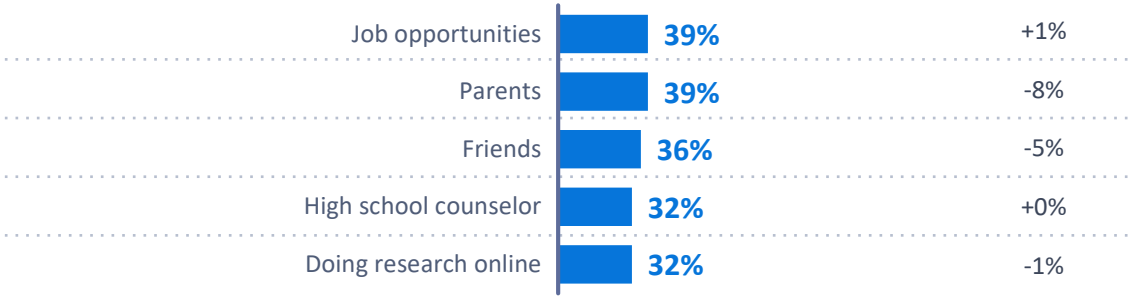


Top Reasons For Taking Classes

Among those currently enrolled

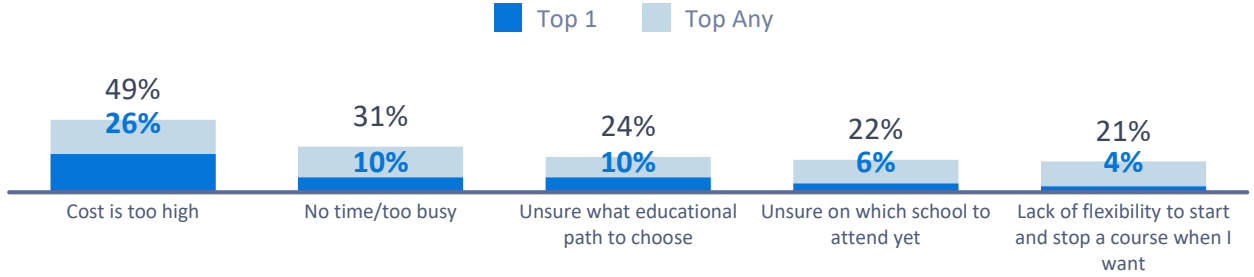


Decision sources



Top Barriers

Among those not currently enrolled



Percentages + or – are comparisons versus total sample.

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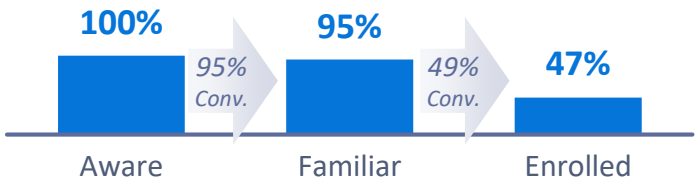
While Support-Seeking Graspers see CCs as only good for people just graduating high school, they would also be happy to get all their education from one. However, they still have general concerns about CCs.

Community College Awareness



Considered Enrollment

61%
(+3%)

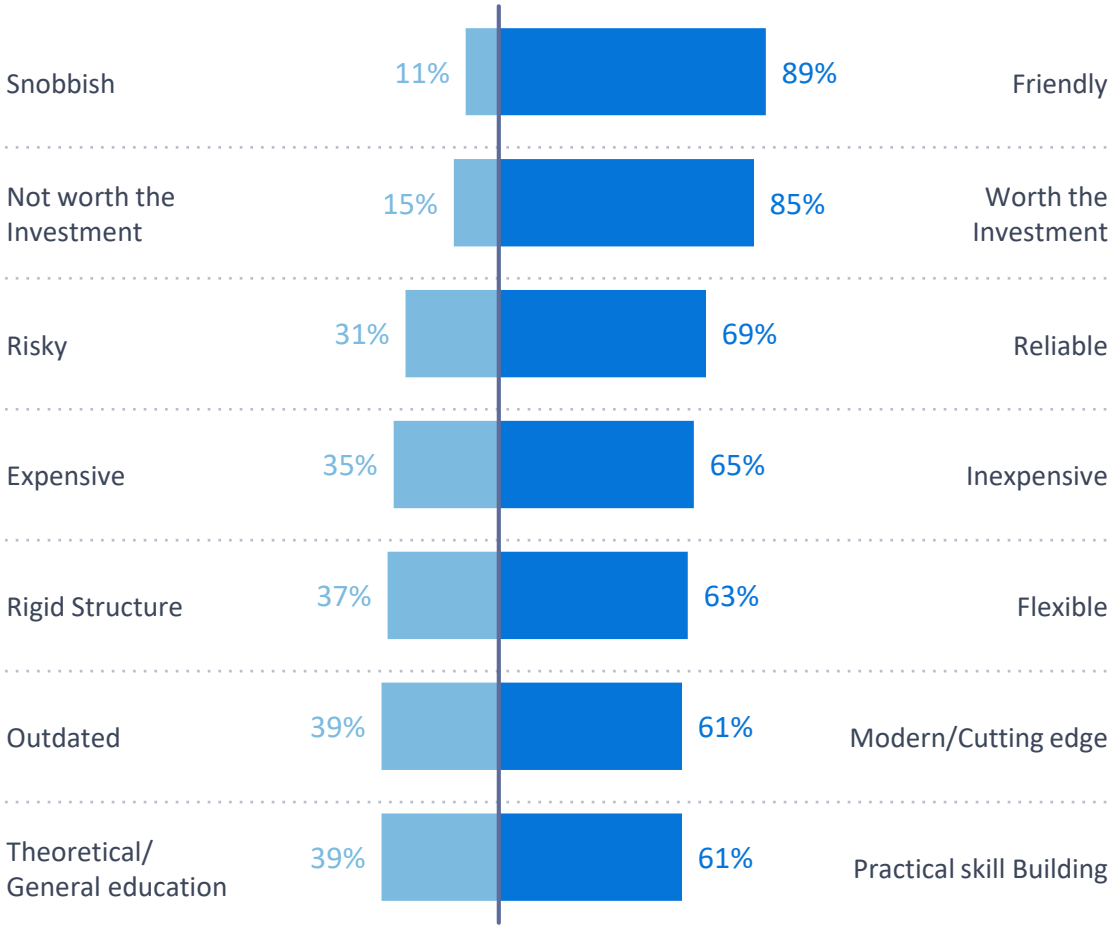
Currently Enrolled in CC

23%
(+1%)

Community College Perceptions

Community colleges are only good for people who have just graduated from high school	**58%**	(+35%)
I would be happy to get all of my education from a community college	**80%**	(+34%)
I have concerns about community college	**59%**	(+19%)
I would keep it to myself that I go to community college	**55%**	(+16%)
I think I would fit right in with the kinds of students that go to community college	**77%**	(+13%)
Community college professors are just as good as they are at bigger schools	**80%**	(+7%)
I had/have a pretty good idea of what community college is all about	**85%**	(+3%)
Community college caters to a wide variety of interests	**74%**	(+1%)

CC Word Associations



Awareness of community college was a requirement to enter the study. Percentages + or – are comparisons versus total sample.

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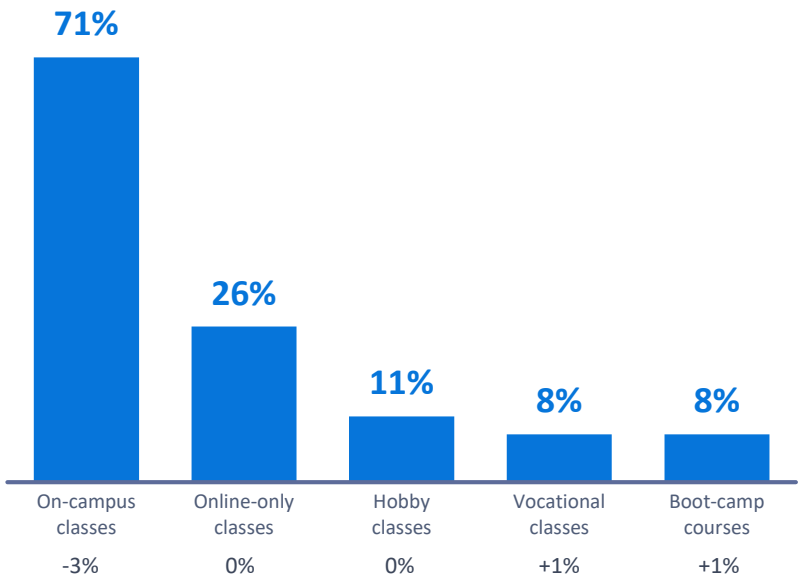
Consistent communication from their counselors and connections with their professors are key for Support-Seeking Graspers. They're also in need of flexibility in their schedule, and would like to be able to start/stop classes at their own pace.

School Specifics

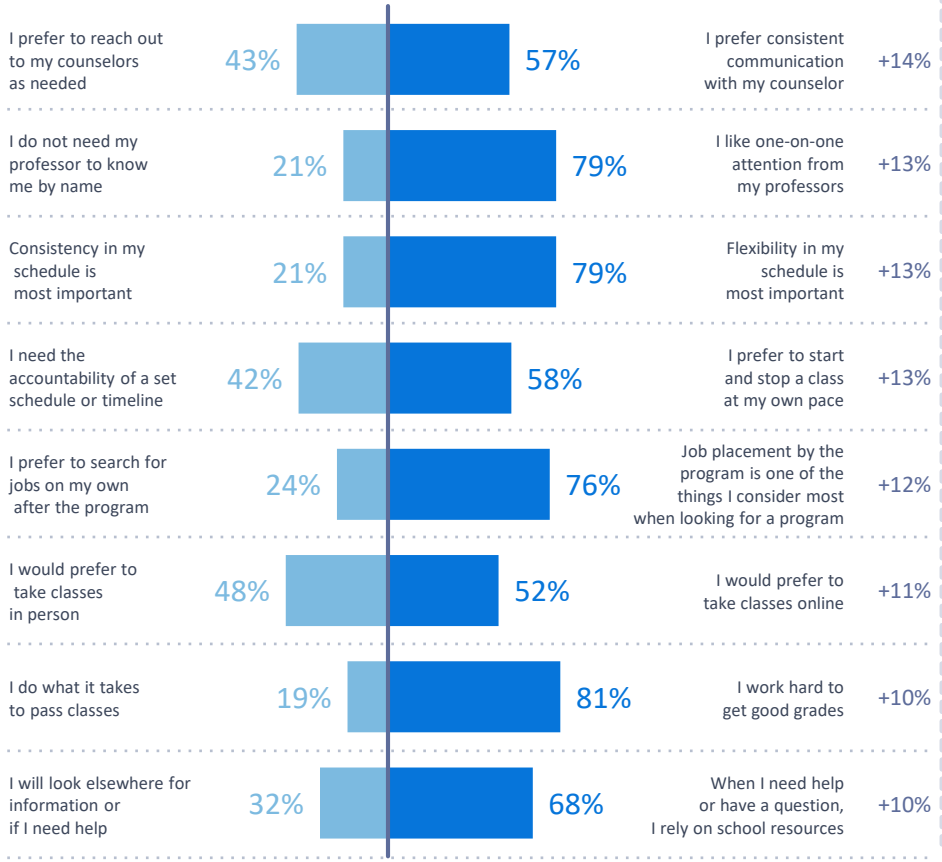
54% Currently Enrolled in education

Types of Classes

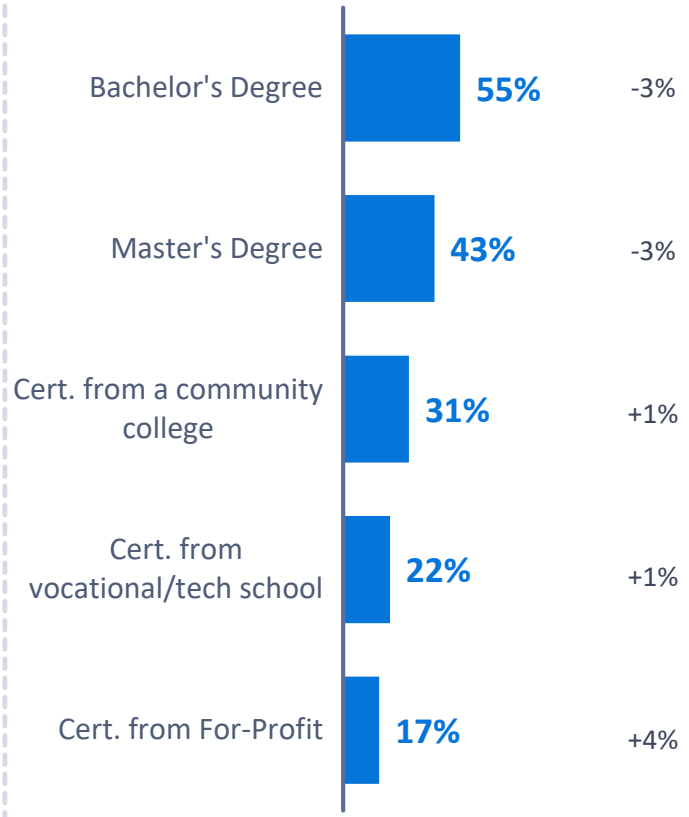
(Among those currently enrolled)



School Preferences



Essential Degree



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Most Support-Seeking Graspers have taken steps against or are concerned about automation. Many of them show interest in health services as a field.

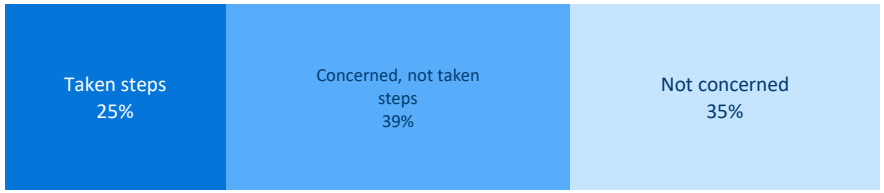
Automation & Strong Workforce

53% (-2%) Aware of Automation

32% (+3%) In Automation-Risky Jobs

How does Automation make you feel?

Actions Against Automation



Top 3 Considerations for Major

1. Passion/Interests — **26%**
2. Potential Salary — **18%**
3. Work-Life Balance — **16%**

Top 3 Program Interest

1. Entertainment & Digital Media — **41%**
2. Health Services — **40%**
3. Information & Communications Technology — **30%**

Top 3 Industry Pursuing

(Among those currently enrolled)

1. Health Services — **19%**
2. Business — **18%**
3. Advanced Transportation — **10%**

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Additionally, Support-Seeking Graspers are very worried that their job could be automated, and are trying to figure out their passions in life.

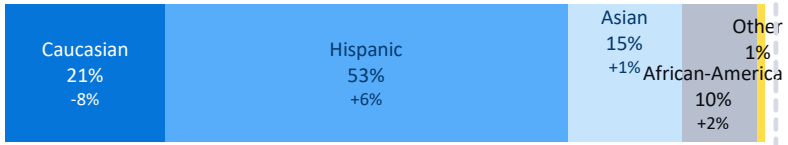
General Attitudes & Demos

Lifestyle

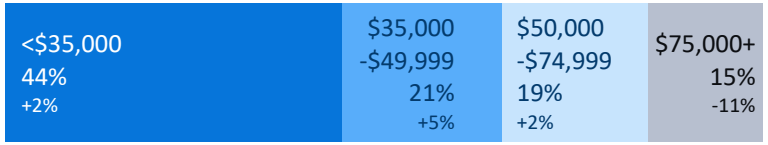
I'm concerned that my job or my future job could be automated	64%	(+21%)
I'm still trying to figure out my passions in life	68%	(+20%)
I think everyone is responsible for their own good fortune	79%	(+14%)
I struggle to make ends meet	77%	(+12%)
My family obligations often prevent me from focusing on my own needs	59%	(+12%)
I'm not really concerned about how others think of me	64%	(+11%)
People depend on me	75%	(+8%)
I'm willing to make sacrifices today to have a better life in the future	86%	(+5%)
I have a strong support system in my life	74%	(+5%)
Success is more about working smarter	64%	(+3%)

Age

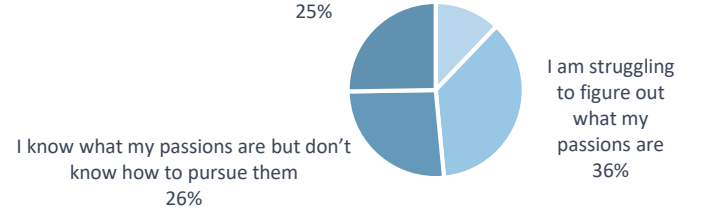
Ethnicity



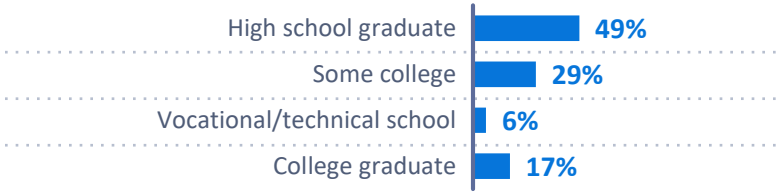
Income



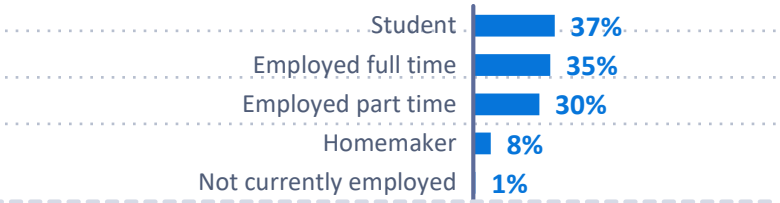
Passion



Education



Employment



Gender

Male	55%
Female	45%

Parents

24%

Household Size

3.4

of People Financially Support

1.3

Unhoused
(Living situation)

12%

Percentages + or – are comparisons versus total sample.

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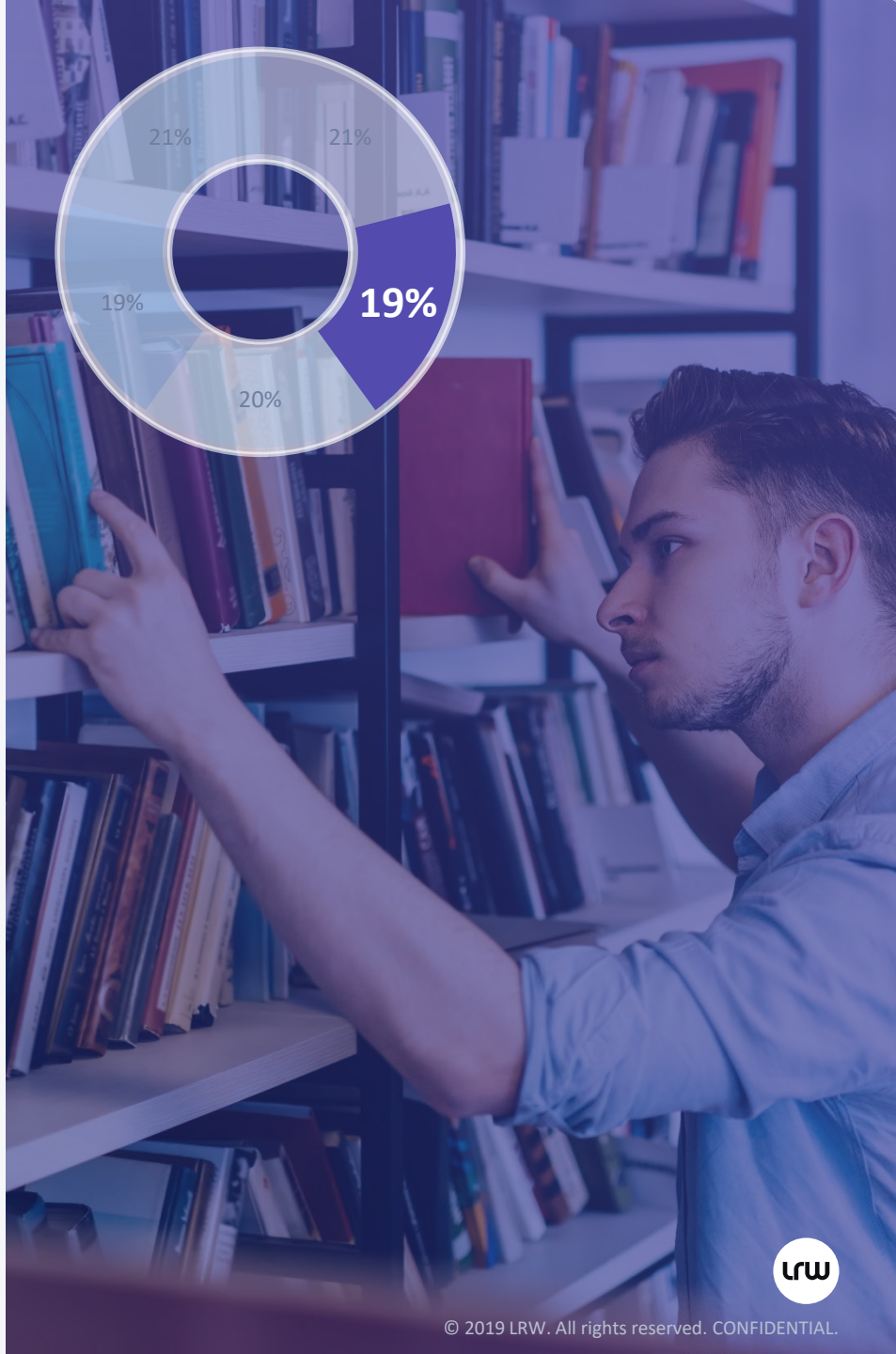
Pragmatic Skillers

Pragmatic Skillers are more about the results than the journey: if they can skip the formal education pathway, they will. They believe most of their education comes from outside of school, and have a focus on *learning*, not just grades.

As they are skeptical of the benefits of the traditional 4-year pathway to education, Pragmatic Skillers **are a *future* target** for LA 19. They aren't concerned about the prestige of an institution but more of what it can offer, and already think that community college would be a great fit for their needs. Meet their needs by developing short, targeted, online programs for the skills that they seek.

They prioritize **quick experience** when choosing from educational options. They're independent, preferring to learn on their own, making them a good fit for online courses and certificates. They can also become advocates for LA 19 courses, as they think that they would fit right in at community college, and would be proud to tell others that they attend.



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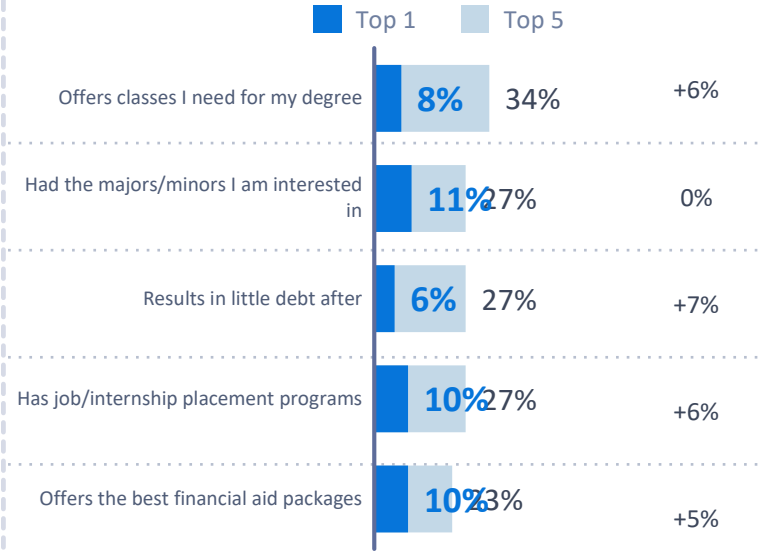
Pragmatic Skillers are “street smart”. Most of their education comes from outside of formal schooling, and they think that good jobs come from knowing people. Their top considerations are around their degrees, but job placement is also important.

Key Attitudes About Education

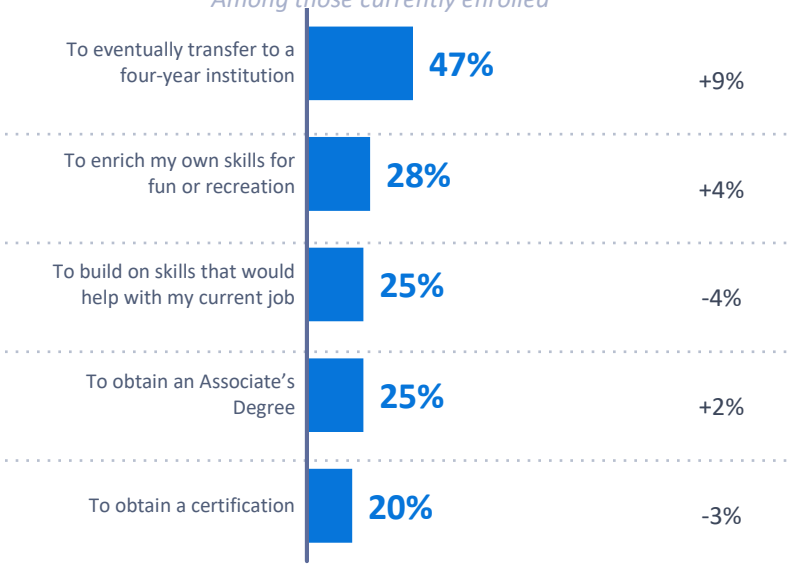
Most of my education comes from ways other than school	76%	(+31%)
Getting a good job is mostly about knowing the right people	75%	(+30%)
I like to learn on my own	71%	(+23%)
Financial aid is a must	82%	(+15%)
Most important things to learn are taught outside of school	77%	(+13%)
Classmates don’t matter as long as professor is an expert	57%	(+8%)
Education is the best way to make a better life	64%	(+7%)
As long as the information is there, the way it’s presented to me doesn’t matter	54%	(-7%)
When it comes to education, I’m more concerned about learning	66%	(+7%)
Education is about learning theory and how to think critically	55%	(+7%)

Top Considerations

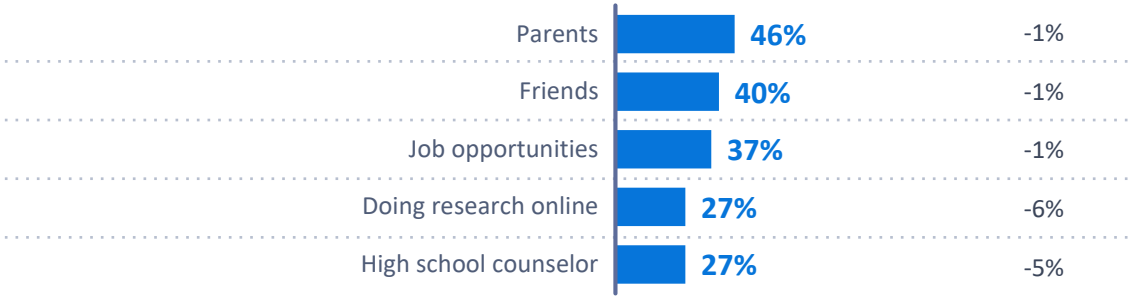


Top Reasons For Taking Classes

Among those currently enrolled

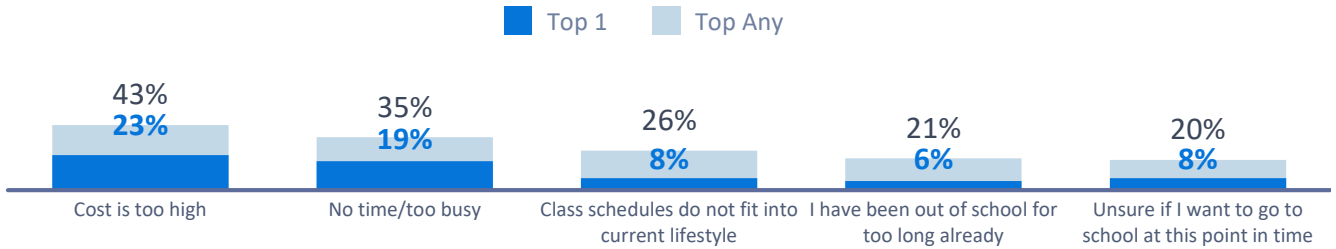


Decision sources



Top Barriers

Among those not currently enrolled



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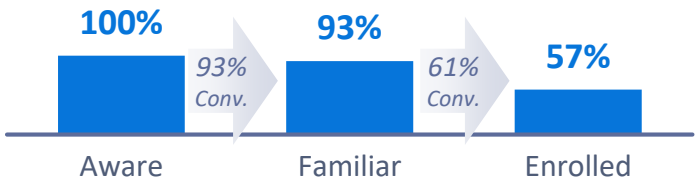
Additionally, Pragmatic Skillers are very open to community colleges: They say it's a great fit for them and that they would fit right in.

Community College Awareness



Considered Enrollment

67%

(+9%)

Currently Enrolled in CC

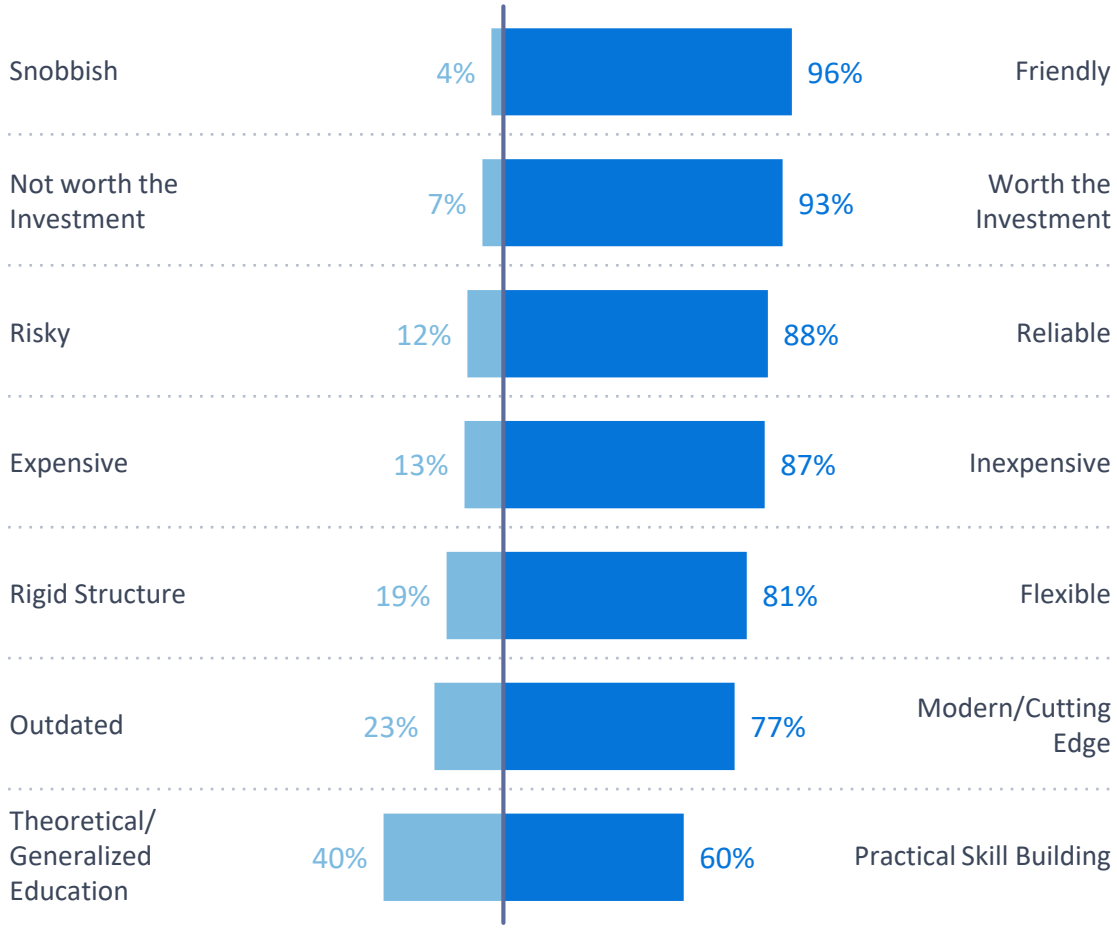
24%

(+2%)

Community College Perceptions

Community college is a great fit for me and my needs	**92%**	(+32%)
I would be proud to tell others I go to community college	**86%**	(+25%)
I think I would fit right in with the kinds of students that go to community college	**81%**	(+17%)
Community colleges can help people at various stages in their careers	**90%**	(+13%)
Community college caters to a wide variety of interests	**86%**	(+13%)
I would be happy to get all of my education from a community college	**57%**	(+11%)
Community college professors are just as good as they are at bigger schools	**81%**	(+8%)
I had/have a pretty good idea of what community college is all about	**85%**	(+3%)

CC Word Associations



Awareness of community college was a requirement to enter the study. Percentages + or – are comparisons versus total sample.

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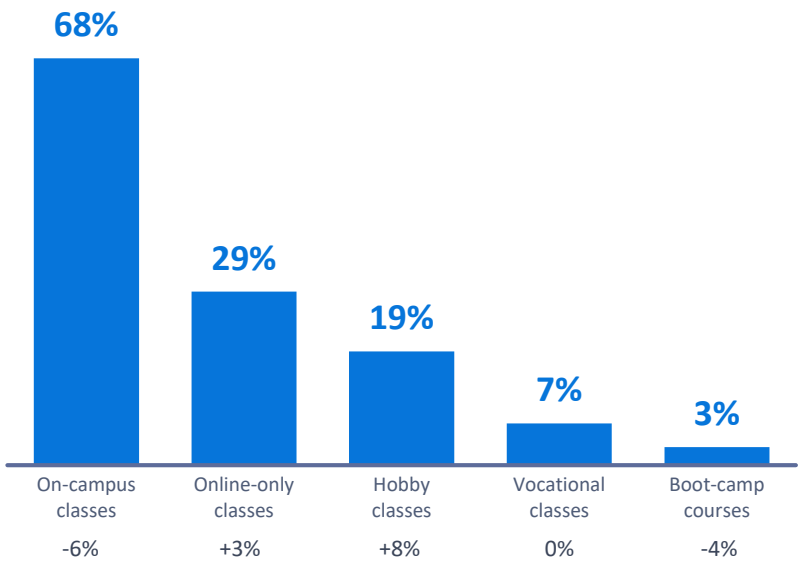
A differentiating item for Pragmatic Skillers is that they want programs for quick experience, and a third consider a certificate from a CC as essential for their goals.

School Specifics

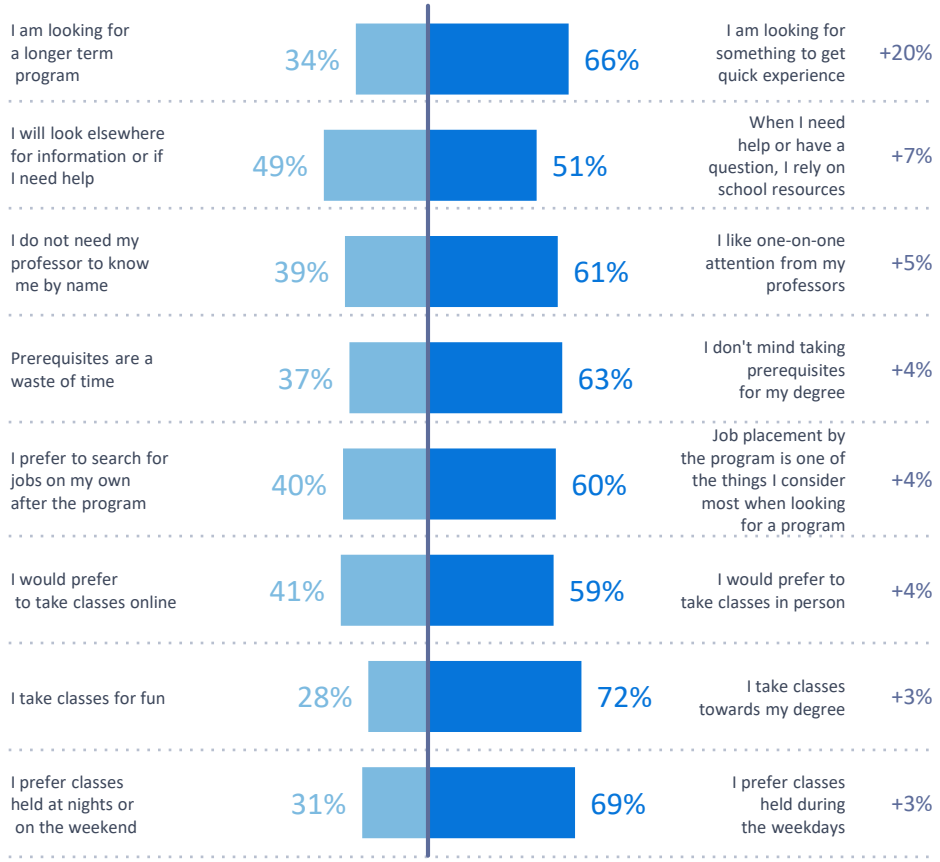
41% Currently Enrolled in education

Types of Classes

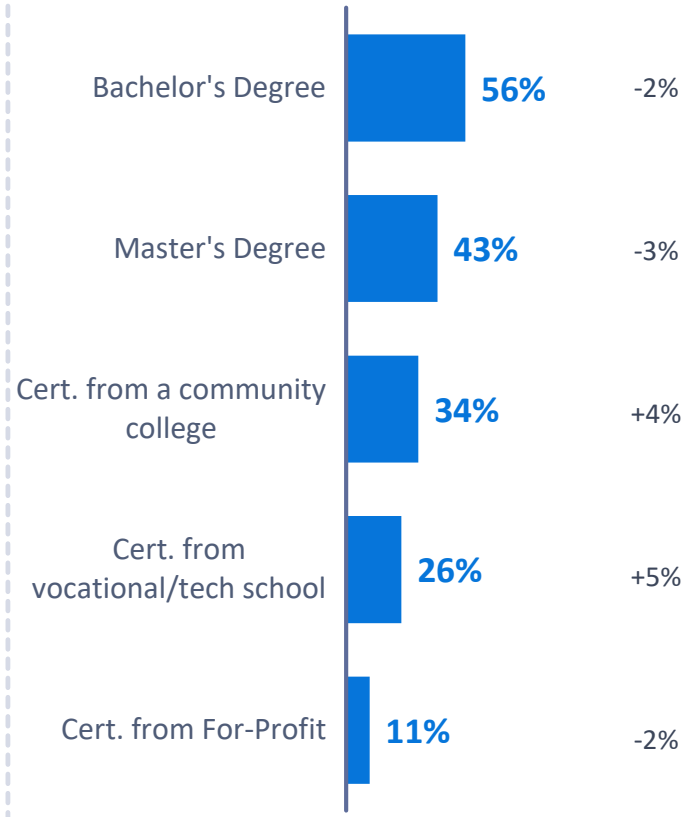
(Among those currently enrolled)



School Preferences



Essential Degree



Percentages + or – are comparisons versus total sample.

Pragmatic Skillers

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Alignment with their passion & interests is a main consideration by far for Pragmatic Skillers when selecting a major.

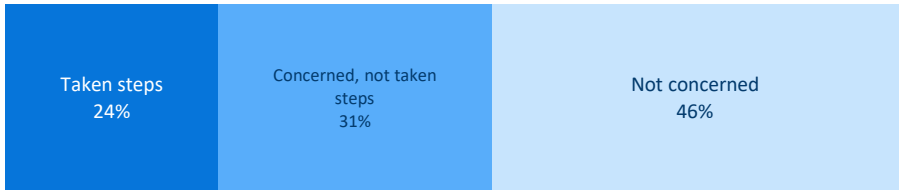
Automation & Strong Workforce

59% (+4%) Aware of Automation

28% (-1%) In Automation-Risky Jobs

How does Automation make you feel?

Actions Against Automation



Top 3 Considerations for Major

32%	Passion/Interests
17%	Work-Life Balance
15%	Potential Salary

Top 3 Program Interest

38%	Entertainment & Digital Media
33%	Health Services
28%	Information & Communications Technology

Top 3 Industry Pursuing

(Among those currently enrolled)

16%	Social Sciences
15%	Information & Communications Technology
14%	Business

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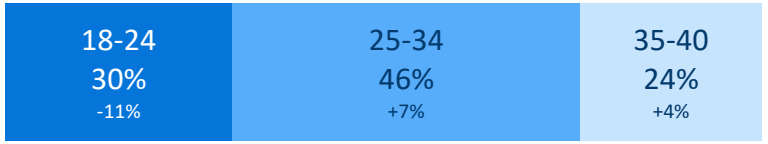
Pragmatic Skillers are more likely to say they know what their passions are, and many are actively pursing them.

General Attitudes & Demos

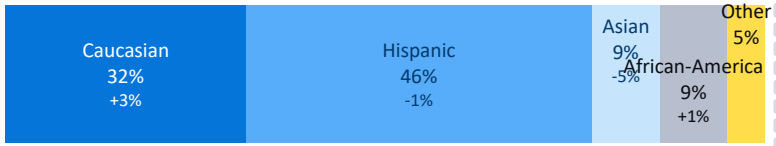
Lifestyle

I have a clear idea of what my passions are	66%	(+14%)
I know that my job won't be automated	65%	(+8%)
I'm not really concerned about how others think of me	59%	(+6%)
I think everyone is responsible for their own good fortune	59%	(-6%)
I have a strong support system in my life	63%	(-6%)
I struggle to make ends meet	69%	(+4%)
People depend on me	65%	(-2%)
I'm willing to make sacrifices today to have a better life in the future	79%	(-2%)
I make it a point to focus on my own needs	52%	(-1%)
Success is more about working smarter	60%	(-1%)

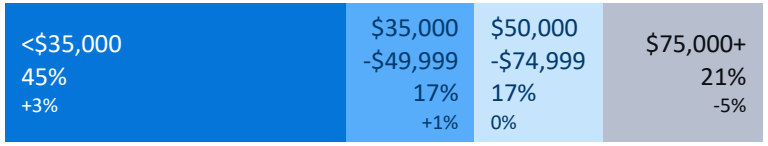
Age



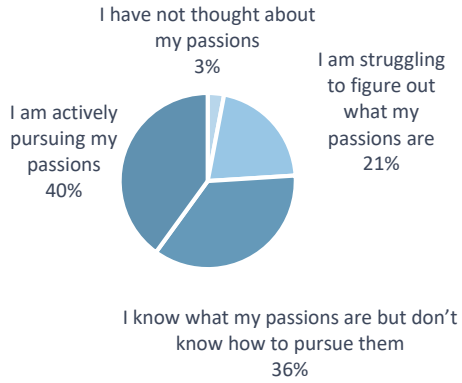
Ethnicity



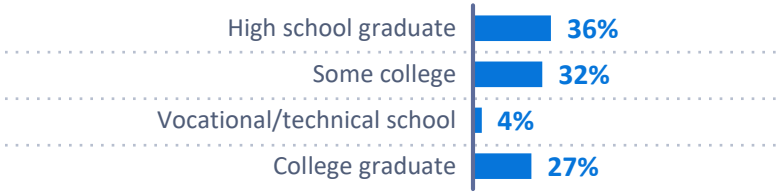
Income



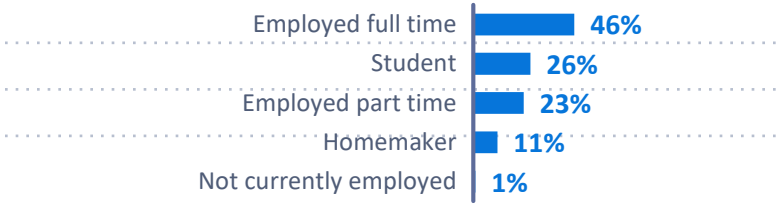
Passion



Education



Employment



Gender

Male	45%
Female	55%

Parents

30%

Household Size

3.3

of People Financially Support

1.3

Unhoused
(Living situation)

16%

Percentages + or – are comparisons versus total sample.

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Status Seekers

Status Seekers are razor focused on a degree and the associated pedigree. They have a clear vision of what they want to do with their degree and how to get there, and are willing to pursue it no matter the financial cost.

They strongly value education and think that most education comes from schools, not outside of them. They tend to prefer the accountability of a set schedule and timeline and are fond of traditional, in-person programs.

Status Seekers **are not a priority target** for LA 19. They are attracted to the prestige of an institution more than its specific offerings, but are skeptical of Community Colleges as a whole – they think that they would feel like an outsider, have concerns about it meeting their needs, and would keep it to themselves that they go there. Those who do attend do so to eventually transfer to a four-year.

A potential way to an in-roads with this group would be through skill-building: many of them are already in the workforce and may be interested in classes to upskill for their current jobs. Build and market programs separate from the Community College moniker to attract this group.

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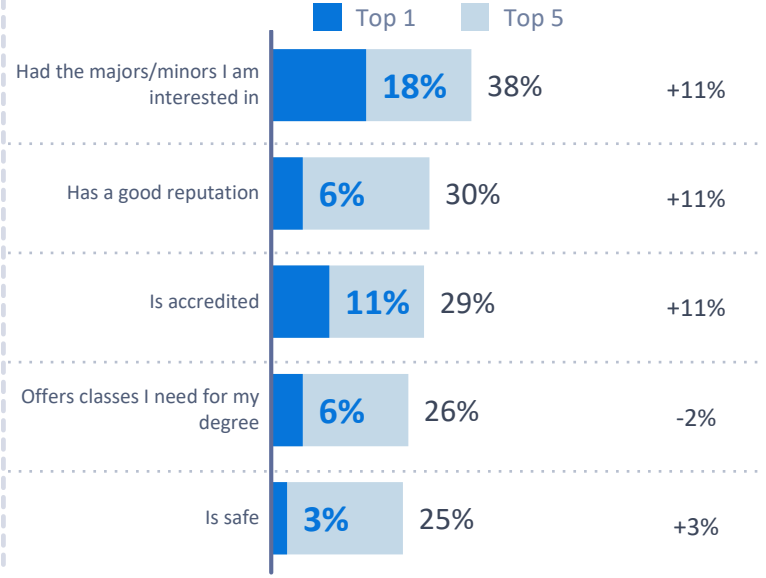
Status Seekers value education and degrees. They see education coming mainly from schools.

Key Attitudes About Education

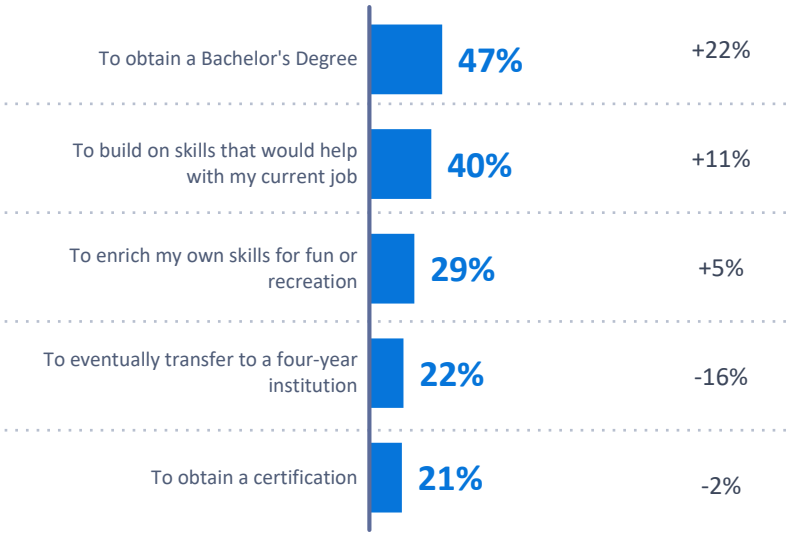
Only would be happy with a completed degree	**91%**	(+19%)
Education comes from school	**72%**	(+17%)
Clear vision of what to do with a degree	**79%**	(+13%)
Financial aid is a must	**55%**	(-12%)
Take education seriously	**86%**	(+8%)
Good job mostly about knowing the right people	**51%**	(+6%)
More concerned about learning	**54%**	(-5%)
I like to learn on my own	**52%**	(+4%)
Choose area of study based on interests/passions	**75%**	(+3%)
Classmates just as important as professors	**54%**	(+3%)

Top Considerations

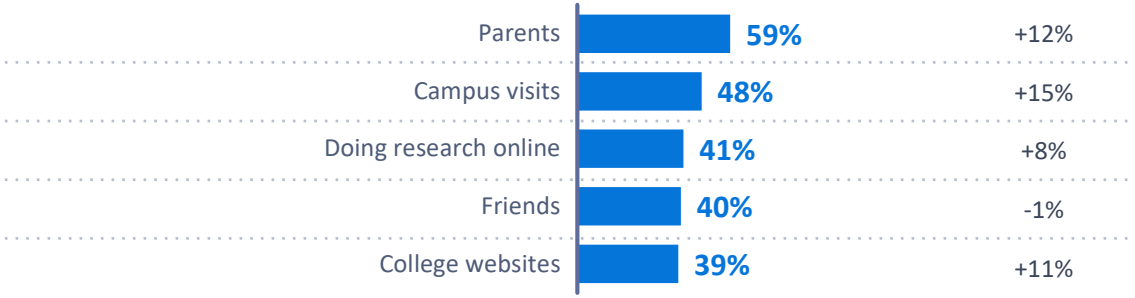


Top Reasons For Taking Classes

Among those currently enrolled

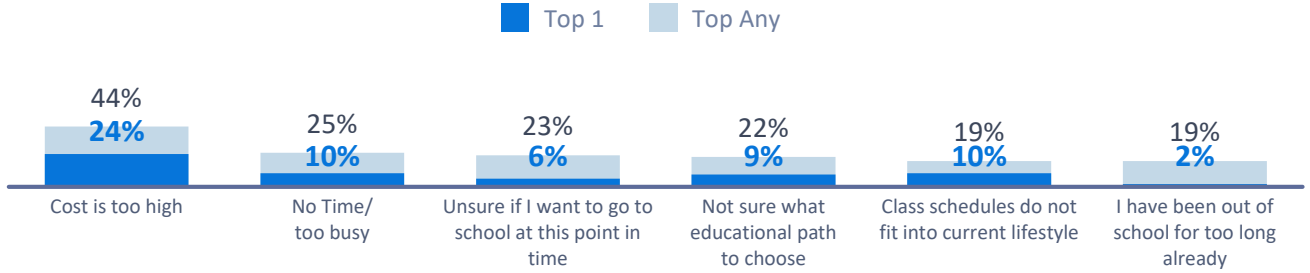


Decision sources



Top Barriers

Among those not currently enrolled



Percentages + or – are comparisons versus total sample.

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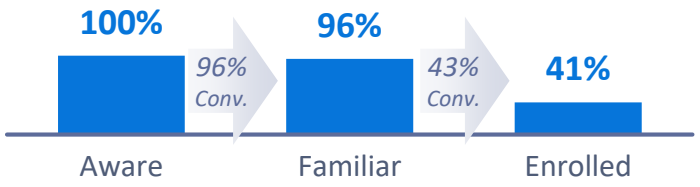
Status Seekers are less likely to have ever considered enrolling in community college, and are more likely to harbor concerns about community colleges and feeling like an outsider there.

Community College Awareness



Considered Enrollment

37%

(-21%)

Currently Enrolled in CC

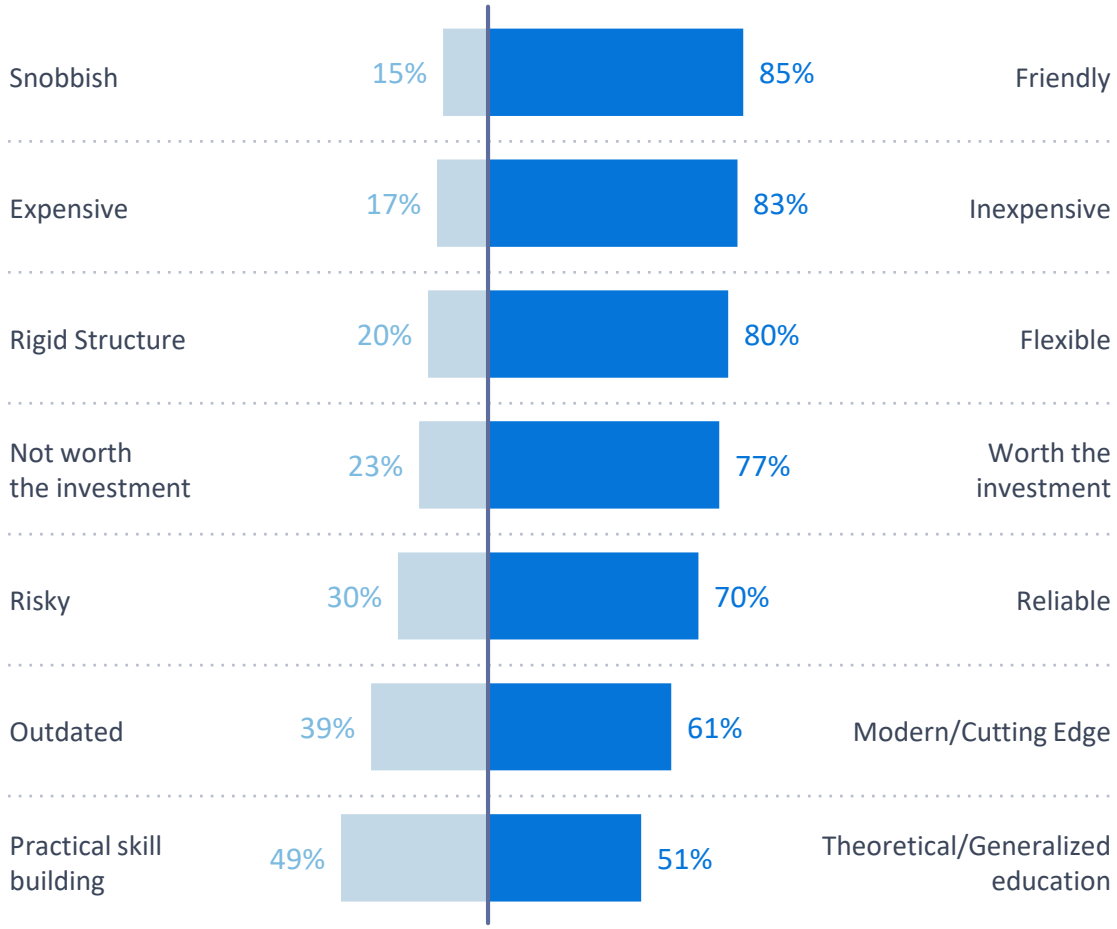
11%

(-11%)

Community College Perceptions

I would see myself as a bit of an outsider at a community college	**83%**	(+47%)
I have concerns about community college	**77%**	(+37%)
I would use community college as a stepping stone to a better school	**89%**	(+35%)
I would keep it to myself that I go to community college	**73%**	(+34%)
Community college professors are generally not as good as they are at bigger schools	**52%**	(+25%)
Community college caters to a wide variety of interests	**58%**	(-15%)
Community college can help people at various stages in their careers	**87%**	(+10%)
I had/have a pretty good idea of what community college is all about	**74%**	(-8%)

CC Word Associations



Awareness of community college was a requirement to enter the study. Percentages + or – are comparisons versus total sample.

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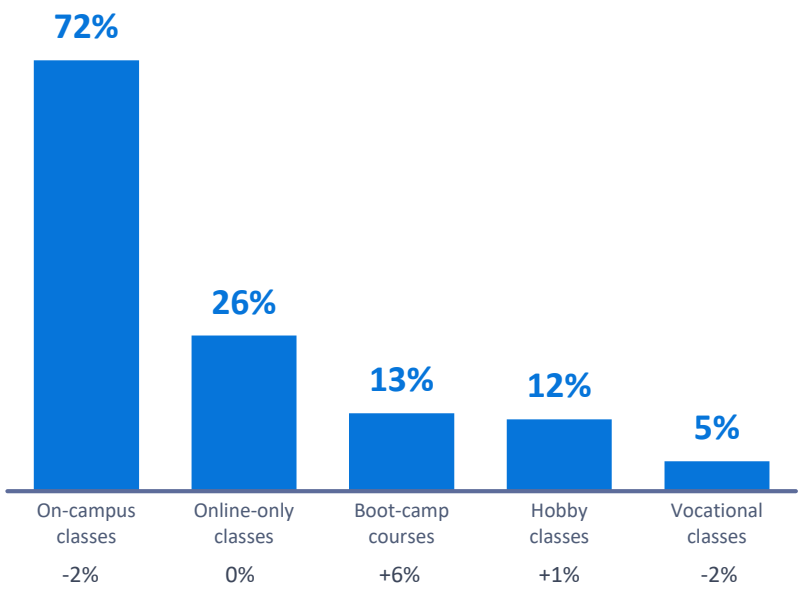
Status Seekers see a Bachelor's degree and beyond as essential. They have preferences for more "traditional" schooling, with set schedules and longer-term programs.

School Specifics

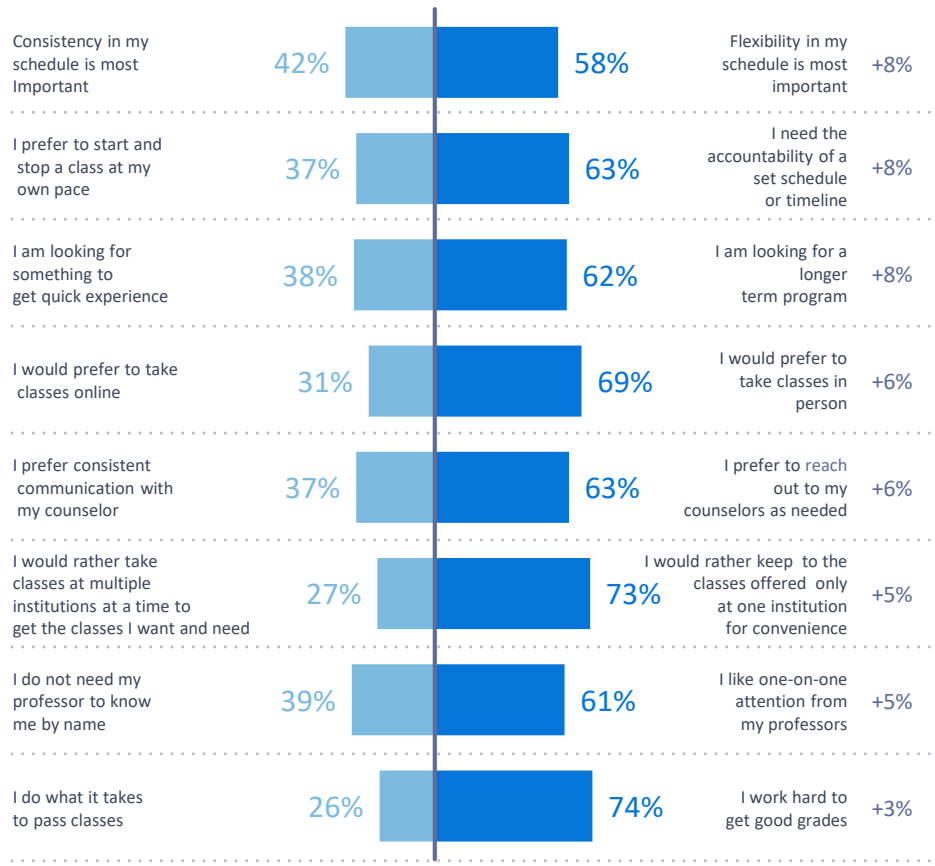
54% Currently Enrolled in education

Types of Classes

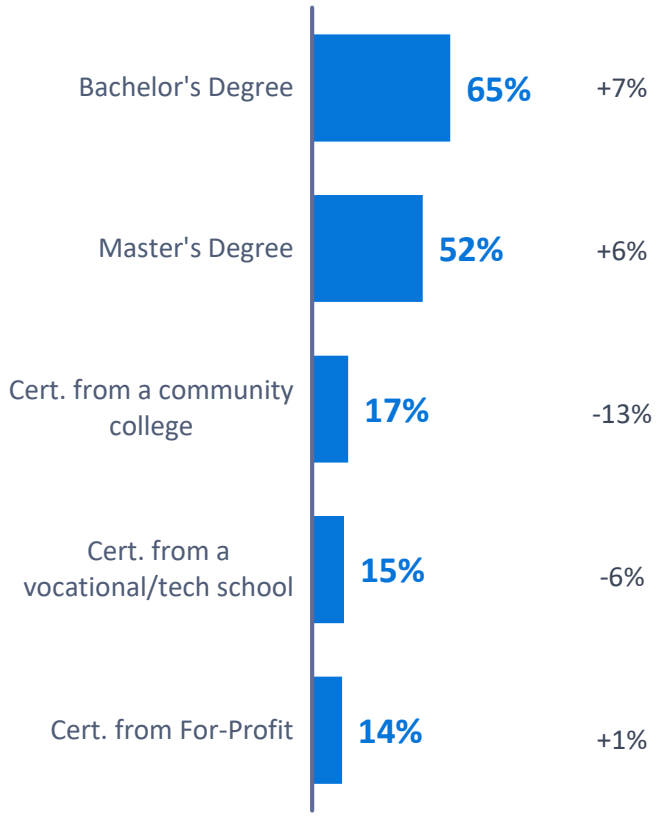
(Among those currently enrolled)



School Preferences



Essential Degree



Percentages + or – are comparisons versus total sample.

Status Seekers

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When choosing a major, Status Seekers' main considerations are passion/interests and salary. As for automation, most have some concern or have taken steps to mitigate its impact on their lives.

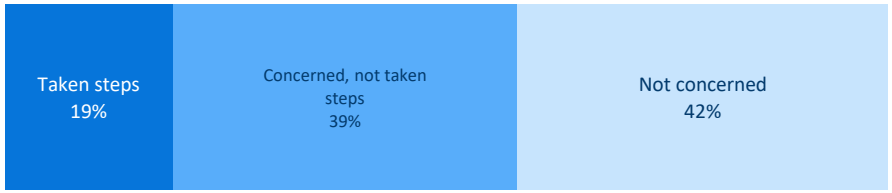
Automation & Strong Workforce

55% (+0%) Aware of Automation

20% (-9%) In Automation-Risky Jobs

How does Automation make you feel?

Actions Against Automation



Top 3 Considerations for Major

1. Passion/Interests — **27%**
2. Potential Salary — **24%**
3. Work-Life Balance — **19%**

Top 3 Program Interest

1. Entertainment & Digital Media — **33%**
2. Health Services — **32%**
3. Information & Communications Technology — **27%**

Top 3 Industry Pursuing

(Among those currently enrolled)

1. Aerospace & Defense — **16%**
2. Social Sciences — **15%**
3. Business — **15%**

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Status Seekers find it important to make a good impression. They also have some idea of what their passions are, but may not know how to pursue them.

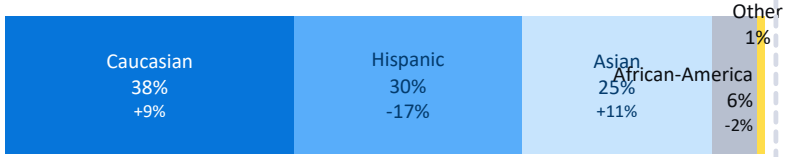
General Attitudes & Demos

Lifestyle

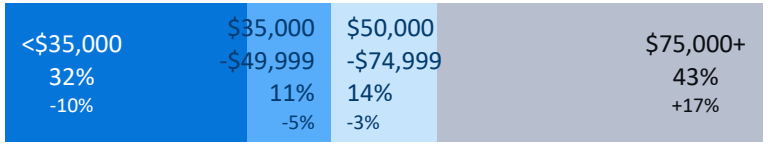
It's important to make a good impression on others	59%	(+12%)
I struggle to make ends meet	53%	(-12%)
I think everyone is responsible for their own good fortune	55%	(-10%)
I know that my job won't be automated	64%	(+7%)
I make it a point to focus on my own needs	60%	(+7%)
I have a clear idea of what my passions are	59%	(+7%)
People depend on me	61%	(-6%)
I Success is more about working smarter	64%	(+3%)
I have a strong support system in my life	67%	(-2%)
I'm willing to make sacrifices today to have a better life in the future	82%	(+1%)

Age

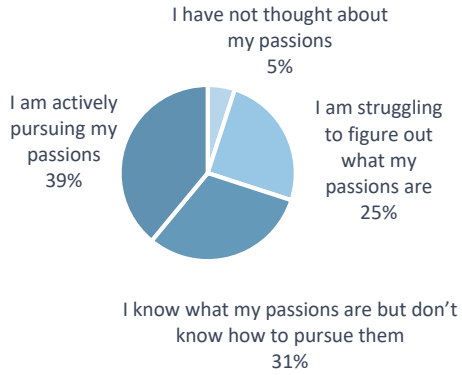
Ethnicity



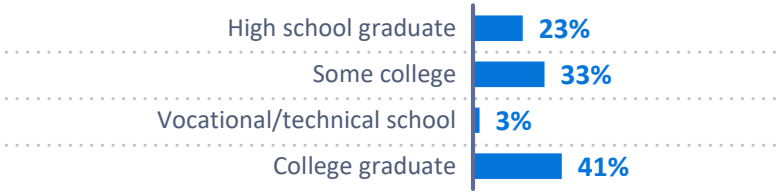
Income



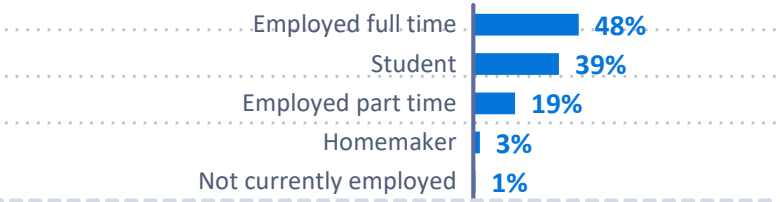
Passion



Education



Employment



Gender

Male	48%
Female	52%

Parents

24%

Household Size

3.1

of People Financially Support

1

Unhoused (Living situation)

10%

Percentages + or – are comparisons versus total sample.

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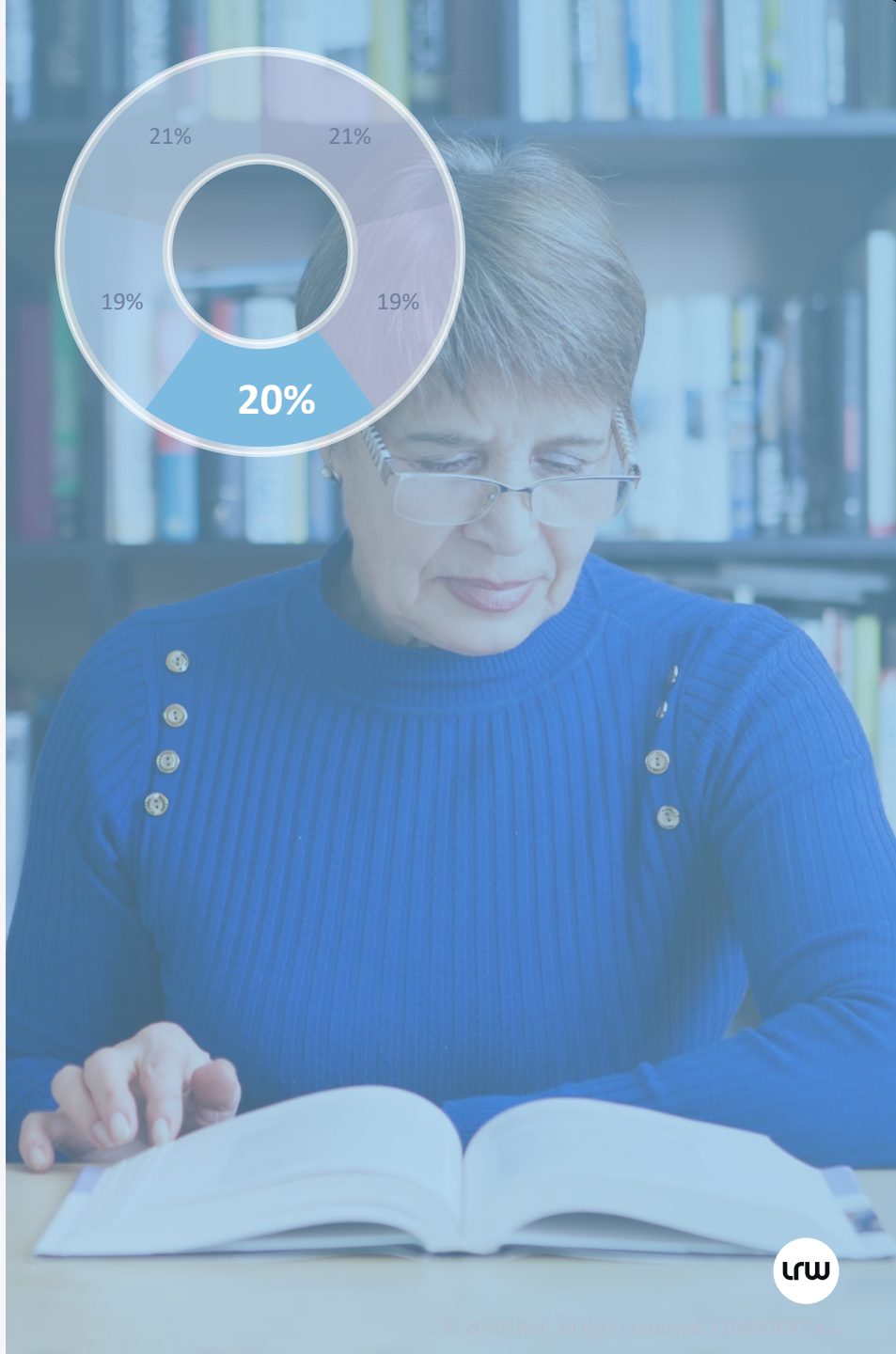
Doubtful Drifters

Doubtful Drifters do not have clear vision for where they want to take their lives, and are skeptical of whether higher education is even the way to get them there. They feel that they are too busy in their life with other things to make education a priority.

This group **is not a recommended priority target** for LA 19. They are skeptical of community colleges overall, see them as only good for certain things, and are more likely to see themselves as outsiders at community college.

At the same time, this group could potentially be targeted using short-term online programs. Because of their schedules, they are more likely to prefer taking courses on weekends or at night, and typically operate independently from school-provided services. Short-term programs would align with the fact they are not particularly degree-motivated. However, they are willing to take classes to build on skills for their current job, or earn a certification.

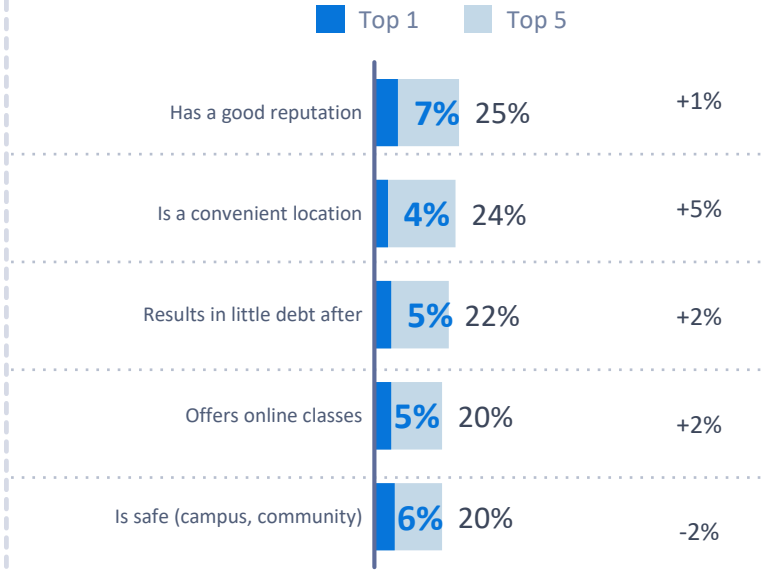


Doubtful Drifters are not interested in getting a degree and aren't even sure which one they'd want. Those currently taking classes are doing so for up-skilling or to gain a certificate, not a degree.

Key Attitudes About Education

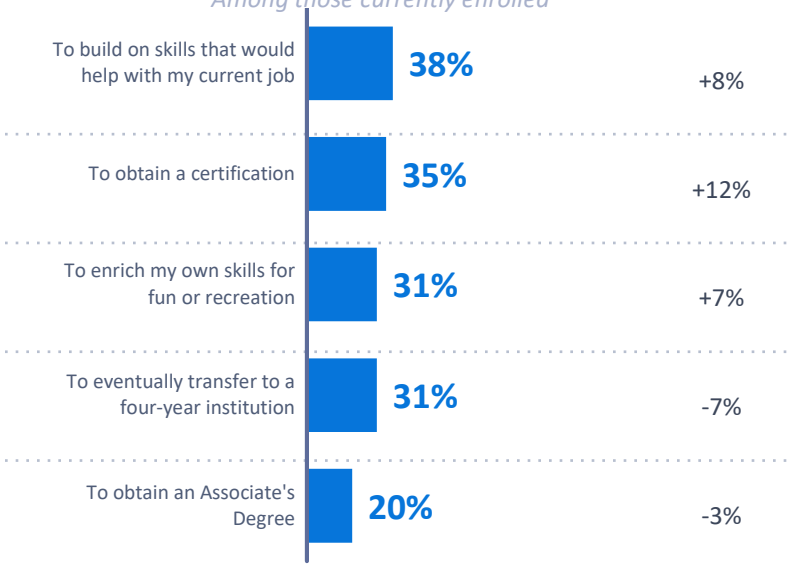
I haven't decided what degree I want	**80%**	(+46%)
I would be happy with my education even if I didn't finish a degree	**74%**	(+46%)
Most of my education comes from ways other than school	**77%**	(+32%)
I take my education very seriously	**54%**	(-24%)
Getting a good job is mostly about knowing the right people	**67%**	(+22%)
I care about my education because I think it is very important	**56%**	(-20%)
Higher education is mostly about gaining skills to make a better life	**60%**	(-16%)
Choose area of study based on my current interests or passions	**56%**	(-16%)
I struggle to pay attention during lectures	**53%**	(+14%)
It doesn't matter who I'm learning with as long as my professor is an expert	**61%**	(+12%)

Top Considerations

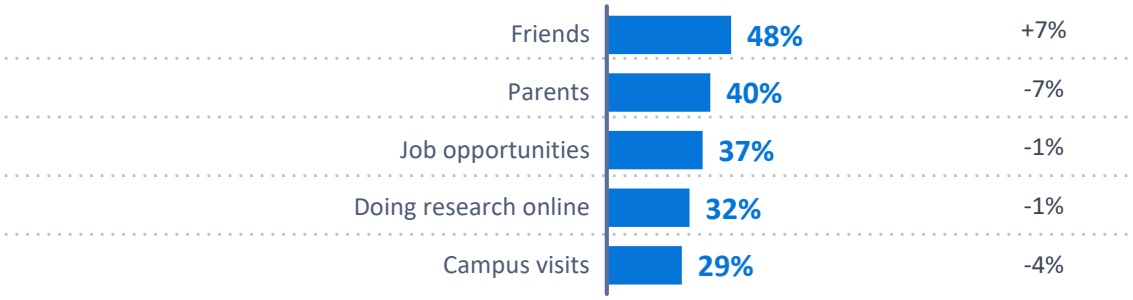


Top Reasons For Taking Classes

Among those currently enrolled

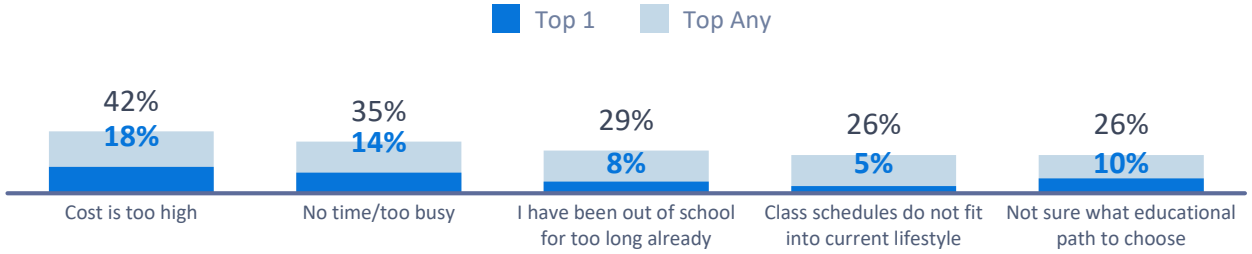


Decision sources



Top Barriers

Among those not currently enrolled



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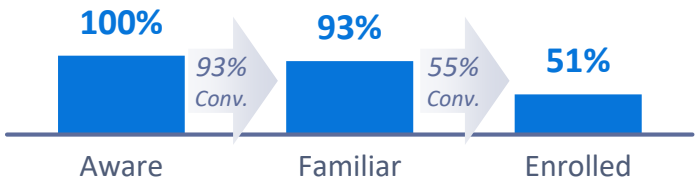
Skepticism of CCs is prevalent among Doubtful Drifters. They are more likely to feel that they're only good for certain things and would see themselves as an outsider. However, around half have enrolled at a CC in the past.

Community College Awareness



Considered Enrollment

52%

(-6%)

Currently Enrolled in CC

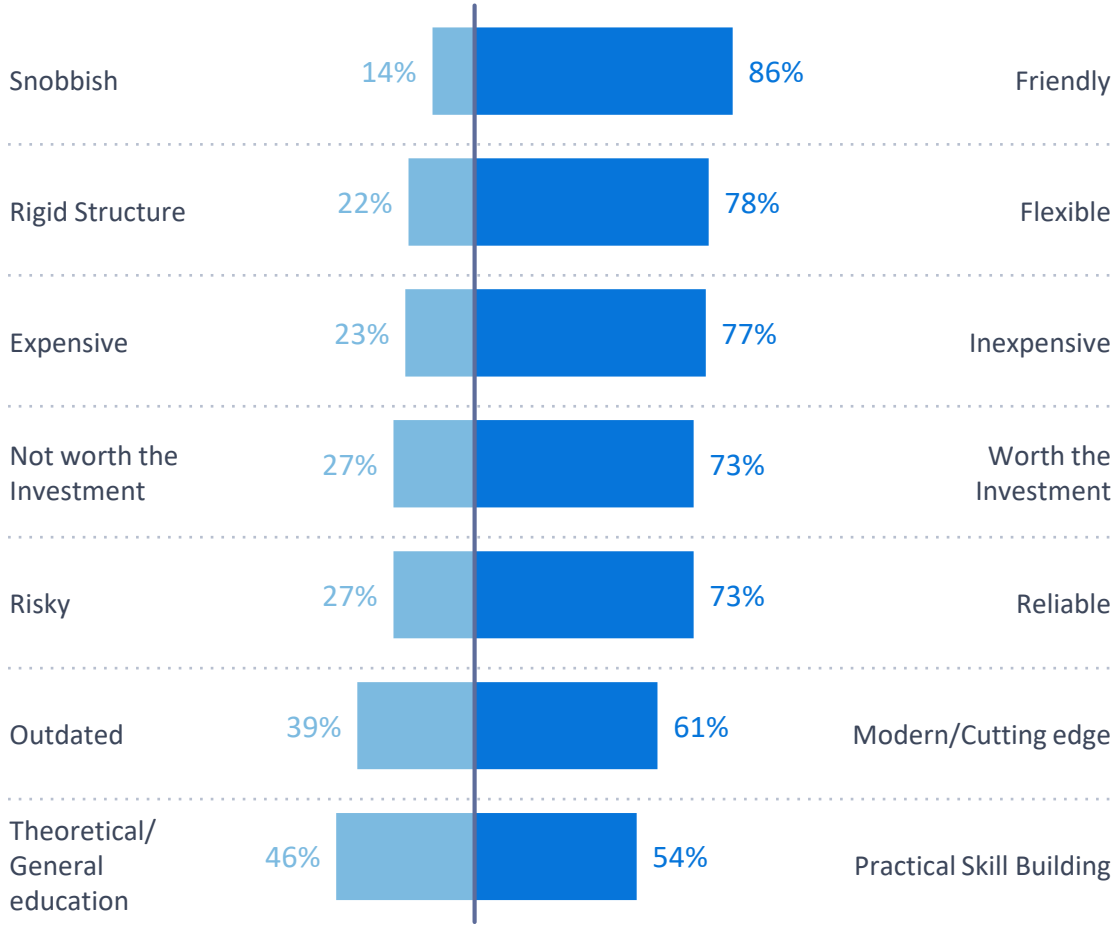
15%

(-7%)

Community College Perceptions

Community college caters to a wide variety of interests	**59%**	(-14%)
I would keep it to myself that I go to community college	**51%**	(+12%)
I think I would fit right in with the kinds of students that go to community college	**54%**	(-10%)
Community college is a great fit for me and my needs	**51%**	(-9%)
Community colleges can help people at various stages in their careers	**68%**	(-9%)
I had/have a pretty good idea of what community college is all about	**73%**	(-9%)
Community college professors are just as good as they are at bigger schools	**65%**	(-8%)
I would use community college as stepping stone to a better school	**52%**	(-2%)

CC Word Associations



Awareness of community college was a requirement to enter the study. Percentages + or – are comparisons versus total sample.

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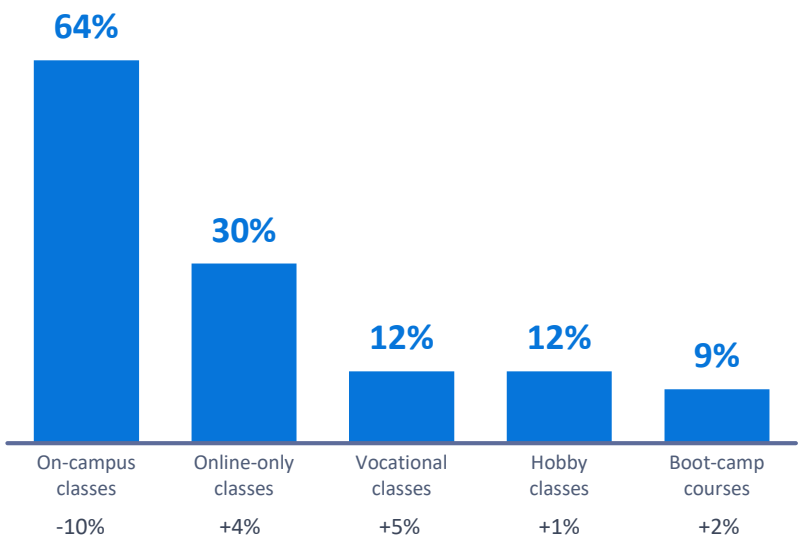
Doubtful Drifters are also skeptical of education overall. They're more interested in quick experience, and while they'd work hard to get good grades, they see pre-requisites as a waste of time and prefer to look for information on their own.

School Specifics

41% Currently Enrolled in education

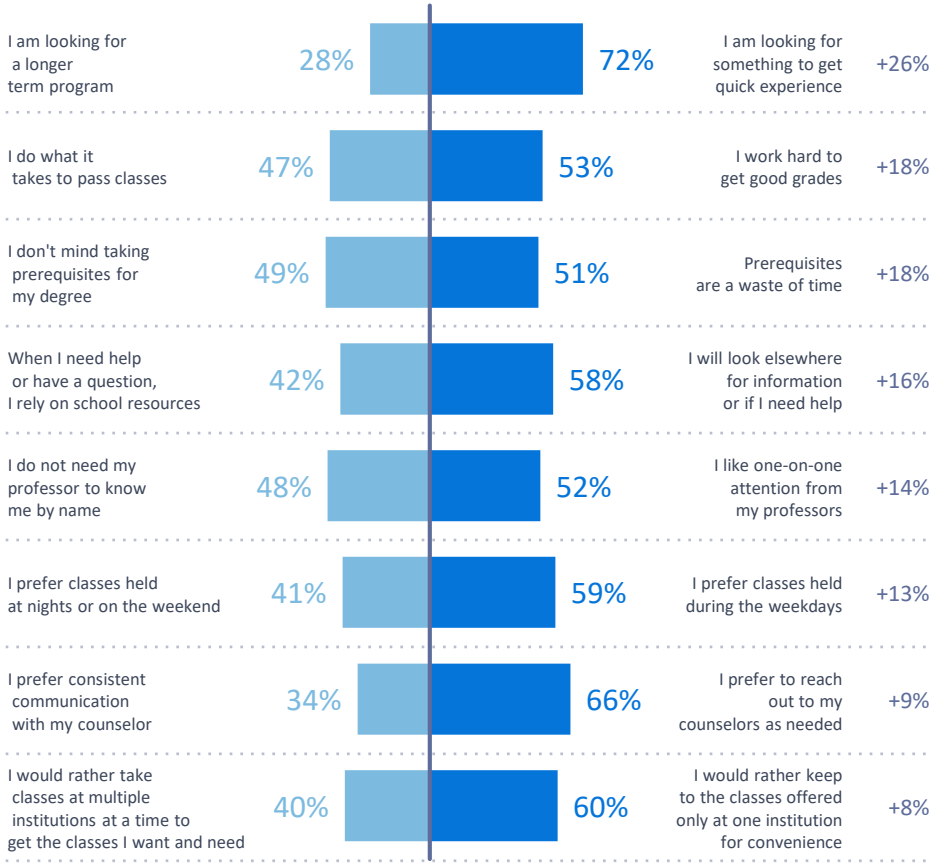
Types of Classes

(Among those currently enrolled)

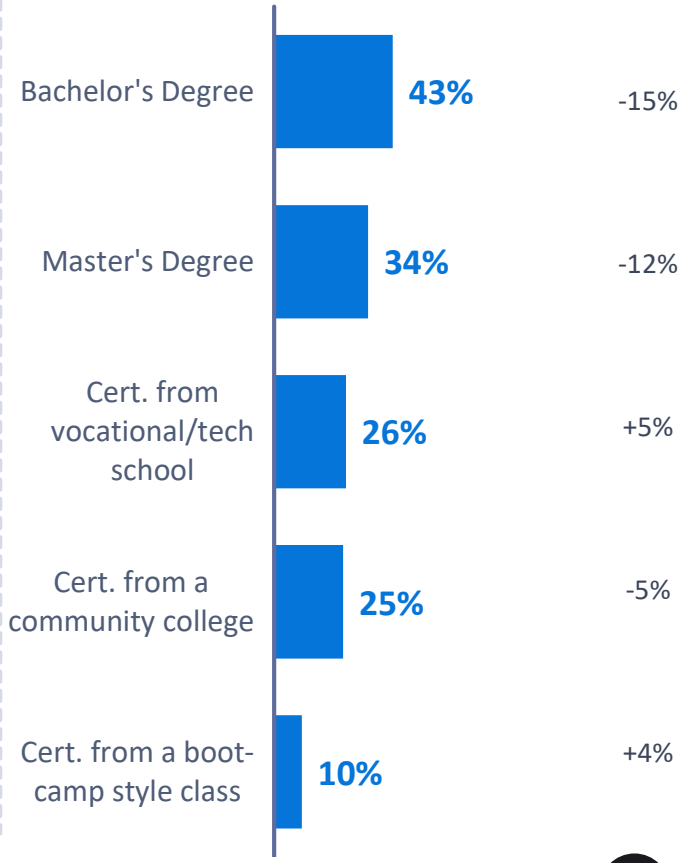


Percentages + or – are comparisons versus total sample.

School Preferences



Essential Degree



Doubtful Drifters

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Nearly half of Doubtful Drifters are concerned about automation affecting them, but haven't taken any steps to address it.

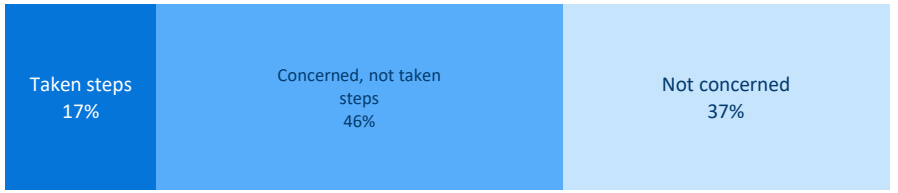
Automation & Strong Workforce

59% (+4%) Aware of Automation

30% (+1%) In Automation-Risky Jobs

How does Automation make you feel?

Actions Against Automation



Top 3 Considerations for Major

25%	Passion/Interests
21%	Potential Salary
13%	Work-Life Balance

Top 3 Program Interest

40%	Entertainment & Digital Media
33%	Health Services
30%	Information & Communications Technology

Top 3 Industry Pursuing

(Among those currently enrolled)

17%	Business
14%	Social Sciences
12%	Entertainment & Digital Media

Percentages + or – are comparisons versus total sample.

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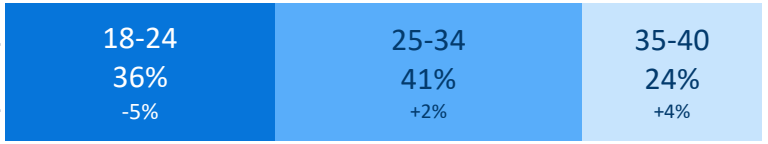
Unsurprisingly, Doubtful Drifters are struggling to find out their passions and how to pursue them. This group also skews lower income.

General Attitudes & Demos

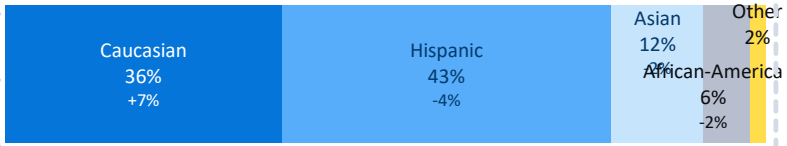
Lifestyle

I'm still trying to figure out my passions in life	**70%**	(+22%)
I'm willing to make sacrifices today to have a better life in the future	**68%**	(-13%)
I have a strong support system in my life	**57%**	(-12%)
I think everyone is responsible for their own good fortune	**54%**	(-11%)
People depend on me	**61%**	(-6%)
Success is more about working smarter	**63%**	(+2%)
I struggle to make ends meet	**66%**	(+1%)
I make it a point to focus on my own needs	**52%**	(-1%)
I know that my job won't be automated	**56%**	(-1%)
I'm not really concerned about how others think of me	**53%**	(0%)

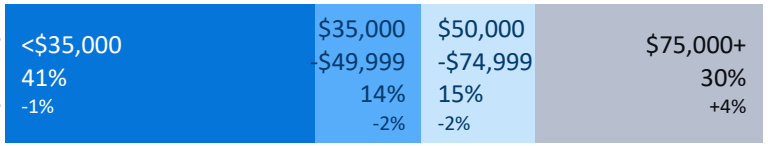
Age



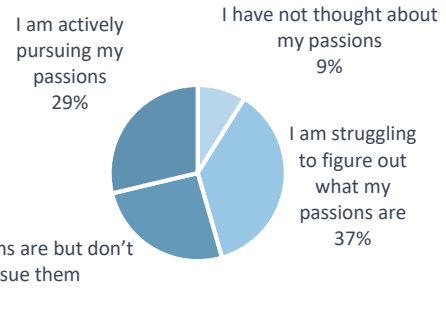
Ethnicity



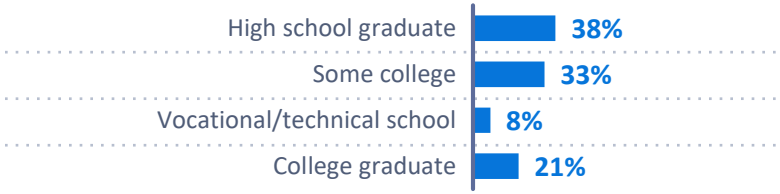
Income



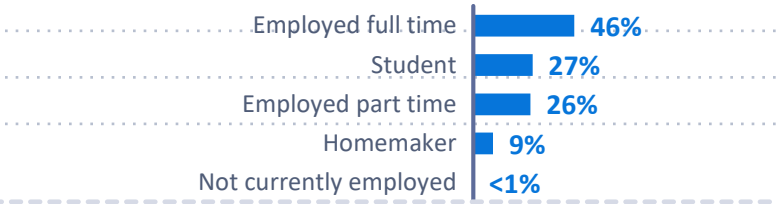
Passion



Education



Employment



Gender

Male	**49%**
Female	**50%**

Parents

33%

Household Size

3.4

of People Financially Support

1.5

Unhoused
(Living situation)

11%

Percentages + or – are comparisons versus total sample.

Doubtful Drifters

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Chapter 3

CROSS-SEGMENT COMPARISONS

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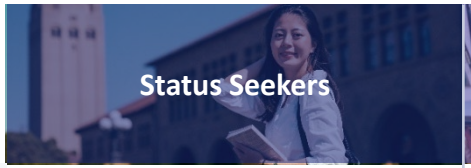
Attitudes toward education vary across segments. Groups with more students enrolled at LA 19 are more likely to attend for transfer reasons.

Education



	Status Seekers		Pragmatic Skillers		Doubtful Drifters		Support-Seeking Graspers		Proud Pupils	
Key Attitudes	I would only be happy with my education if I complete a degree	**91%**	Most of my education comes from ways other than school	**76%**	I haven't decided what degree I want	**80%**	Getting a good job mostly depends on having the right education	**87%**	Most of my education comes from school	**78%**
	Most of my education comes from school	**72%**	Getting a good job is mostly about knowing the right people	**75%**	I would be happy with my education even if I didn't finish a degree	**74%**	Most of my education comes from school	**78%**	Getting a good job mostly depends on having the right education	**76%**
	I have a clear vision of what I would do with a degree	**79%**	I like to learn on my own	**71%**	Most of my education comes from ways other than school	**77%**	I like to collaborate when learning	**70%**	I have a clear vision of what I would do with a degree	**86%**
	I pursue education to get the degree, whatever the cost	**45%**	Financial aid is a must for me to consider a degree	**82%**	Education isn't my priority	**46%**	Education is about learning real-world skills	**69%**	I like to collaborate when learning	**71%**
	I take my education very seriously	**86%**	The most important things to learn are taught outside of school	**77%**	Getting a good job is mostly about knowing the right people	**67%**	I will consider myself done with education whenever I finish school	**47%**	I take my education very seriously	**93%**
Reasons for Taking Classes (Among those currently enrolled)	To obtain a Bachelor's Degree	**47%**	To eventually transfer to a four year institution	**47%**	To build on skills that would help with my current job or advancing my current job	**38%**	To eventually transfer to a four year institution	**32%**	To eventually transfer to a four year institution	**60%**
	To build on skills that would help with my current job or advancing my current job	**40%**	Enrich my own skills for fun or recreation	**28%**	Obtain a certification	**35%**	To build on skills that would help with my current job or advancing my current job	**32%**	To obtain an Associate's Degree	**35%**
	Enrich my own skills for fun or recreation	**29%**	To build on skills that would help with my current job or advancing my current job	**25%**	Enrich my own skills for fun or recreation	**31%**	To obtain a Bachelor's Degree	**29%**	Obtain a certification	**20%**

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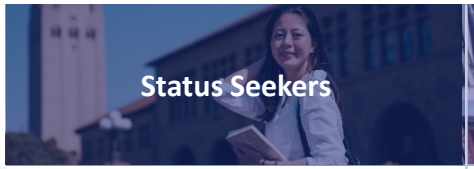
Class availability is a top consideration for all segments. For those not enrolled, their biggest reason, besides cost, is that they do not have the time to attend.

Education (cont'd)



	Status Seekers		Pragmatic Skillers		Doubtful Drifters		Support-Seeking Graspers		Proud Pupils	
Top 5 Considerations	Has the majors/minors I'm interested in	18%	Has the majors/minors I'm interested in	11%	Has the majors/minors I'm interested in	8%	Offers classes I need for my degree	9%	Offers classes I need for my degree	13%
	Is accredited	11%	Offers the best financial assistance packages	10%	Has a good reputation	7%	Has the majors/minors I'm interested in	7%	Has the majors/minors I'm interested in	10%
	Offers classes I need for my degree	6%	Has job/internship placement programs	10%	Offers the best financial assistance packages	7%	Has job/internship placement programs	7%	Is accredited	9%
	Has a good reputation	6%	Offers classes I need for my degree	8%	Is safe	6%	Offers ability to pay after completion of the program, including cost of textbooks	6%	Offers the best financial assistance packages	7%
	Offers the best financial assistance packages	5%	Offers online classes	7%	Offers official certification in a skill, trade, or technology	6%	Good classroom experience	6%	Has job/internship placement programs	6%
Top 5 Barriers (Among those not currently enrolled)	Cost is too high	44%	Cost is too high	43%	Cost is too high	42%	Cost is too high	49%	Cost is too high	38%
	I don't have time in my life / too busy with other things	25%	I don't have time in my life / too busy with other things	35%	I don't have time in my life / too busy with other things	35%	I don't have time in my life / too busy with other things	31%	I haven't made a decision on which school to attend yet	27%
	I haven't made a decision on whether or not I want to go to school at this point in time	23%	Class schedules do not fit in current lifestyle	26%	I have been out of school for too long already	29%	I am not sure what educational path to choose	24%	I don't have time in my life / too busy with other things	24%
	I am not sure what educational path to choose	22%	I have been out of school for too long already	21%	I am not sure what educational path to choose	26%	I haven't made a decision on which school to attend yet	22%	Class schedules do not fit in current lifestyle	17%
	Class schedules do not fit into current lifestyle / Have been out of school for too long already	19%	I haven't made a decision on whether or not I want to go to school at this point in time	20%	Class schedules do not fit in current lifestyle	26%	Lack of flexibility in being able to start and stop a course	21%	Lack of flexibility in being able to start and stop a course	16%
Top Decision Sources	Parents	59%	Parents	46%	Friends	48%	Job opportunities	39%	Parents	51%
	Campus visits	48%	Friends	40%	Parents	40%	Parents	39%	Friends	42%
	Doing research online	41%	Job opportunities	37%	Job opportunities	37%	Friends	36%	Job opportunities	40%
	Friends	40%	High school counselor	27%	Doing research online	32%	High school counselor	32%	High school counselor	38%
	College websites	39%	Doing research online	27%	Campus visits	29%	Doing research online	32%	Doing research online	35%

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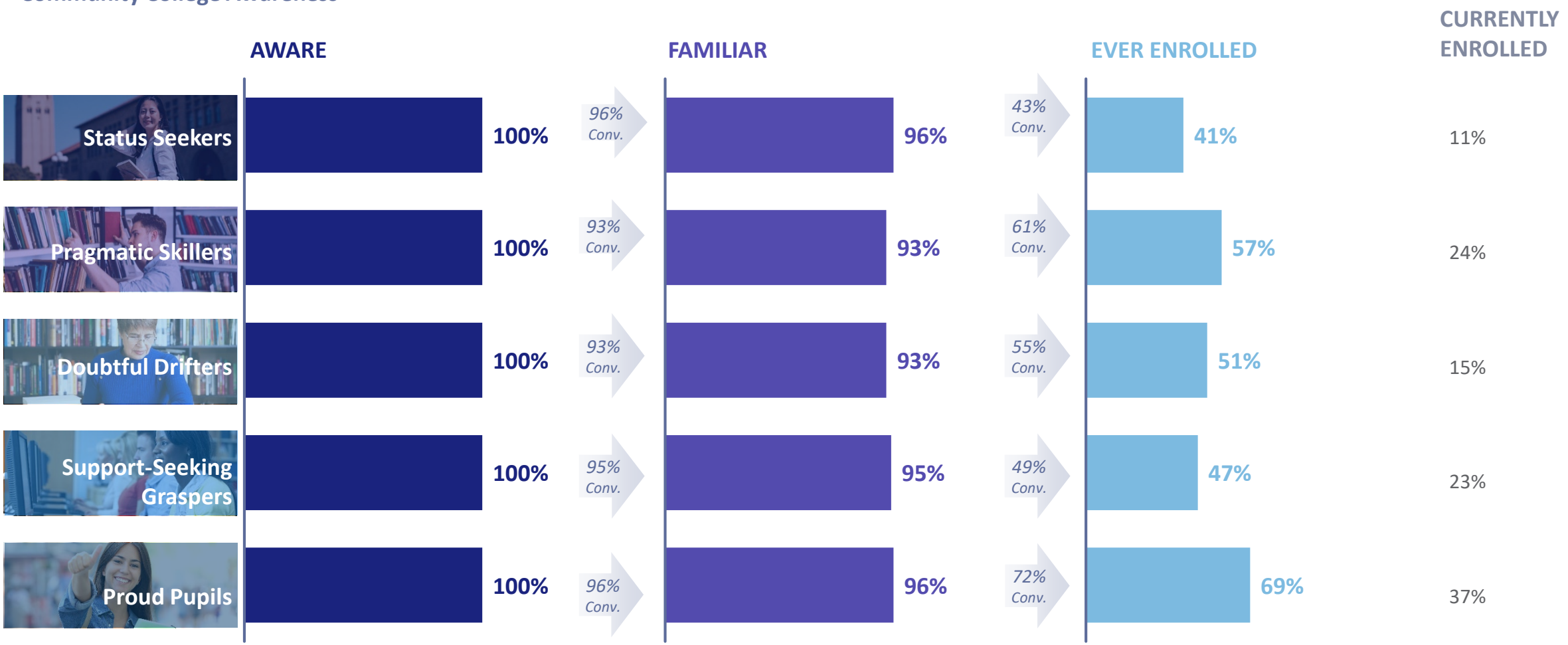
Proud Pupils, followed by Pragmatic Skillers, are the most likely to have ever been enrolled in Community College.

Community College Awareness



Awareness of community college was a requirement to enter the study.

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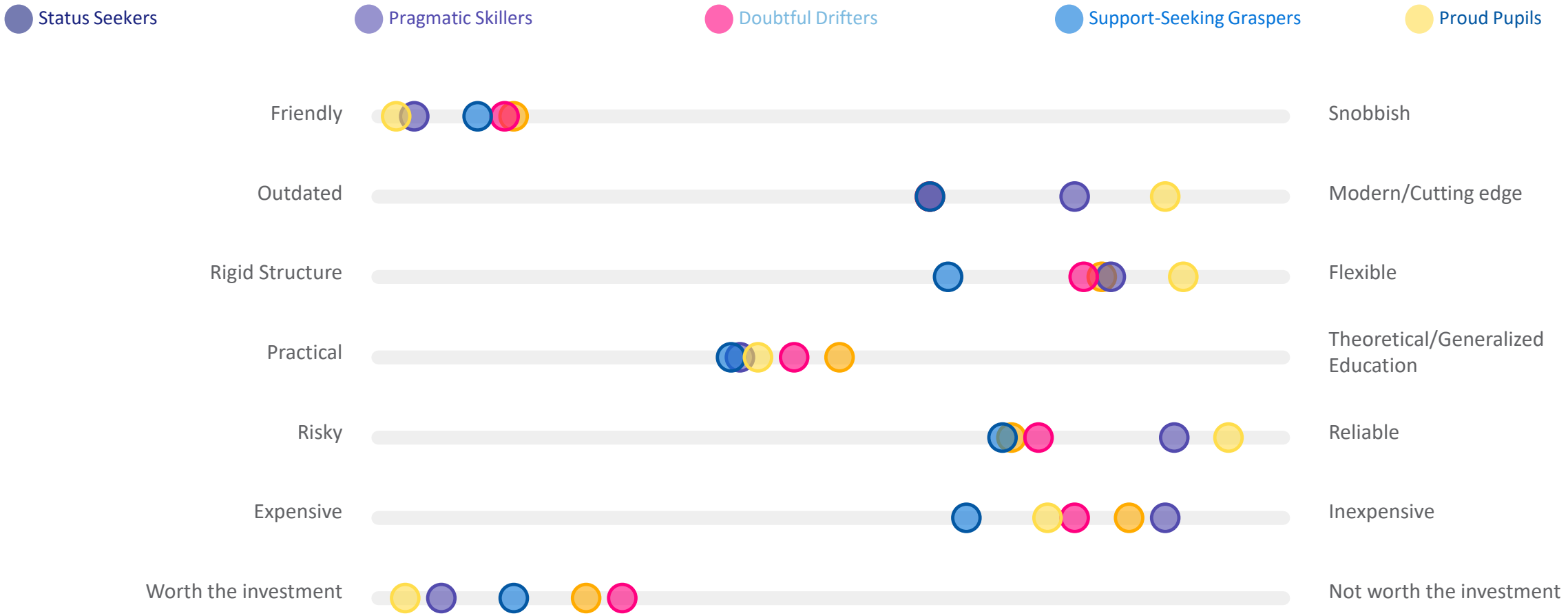
Proud Pupils also hold the most positive views of community colleges.

Community College Word Associations



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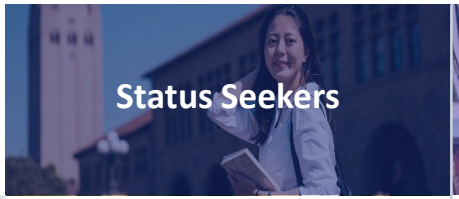
Pragmatic Skillers, Support-Seeking Graspers, and Proud Pupils hold favorable views of community colleges, while Status Seekers and Doubtful Drifters are more skeptical.

Community College



	Status Seekers		Pragmatic Skillers		Doubtful Drifters		Support-Seeking Graspers		Proud Pupils	
Considered Enrollment	**37%**		**67%**		**52%**		**61%**		**74%**	
Key Perceptions	I would see myself as bit of an outsider at a community college	**83%**	CC is a great fit for me and my needs	**92%**	CC is only good for certain things	**41%**	CC are only good for people who have just graduated from high school	**58%**	I would be proud to tell others I go to CC	**95%**
	I have concerns about community college	**77%**	I would be proud to tell others I go to CC	**86%**	I would keep it to myself that I go to CC	**51%**	I would be happy to get all of my education from a CC	**80%**	CC is a great fit for me and my needs	**93%**
	I would use community college as a stepping stone to a better school	**89%**	I think I would fit right in with the kinds of students that go to CC	**81%**	I would see myself as bit of an outsider at CC	**46%**	I have concerns about cc	**59%**	I think I would fit right in with the kinds of students that go to CC	**94%**
	I would keep it to myself that I go to a CC	**73%**	CC caters to a wide variety of interests	**86%**	I have concerns about cc	**49%**	I would keep it to myself that I go to cc	**55%**	CC professors are just as good as they are at bigger schools	**91%**
	CC professors are generally not as good as they are at bigger schools	**52%**	CC can help people at various stages in their careers	**90%**	CC is only good for people who have just graduated from high school	**32%**	I think I would fit right in with the kinds of students that go to CC	**77%**	CC can help people at various stages in their careers	**95%**
	CC is only good for certain things	**42%**	I would be happy to get all of my education from a CC	**57%**	I didn't/don't know that much about what CC is like	**27%**	CC professors are just as good as they are at bigger schools	**80%**	CC caters to a wide variety of interests	**89%**
	CC can help people at various stages in their careers	**87%**	CC professors are just as good as they are at bigger schools	**81%**	CC professors are generally not as good as they are at bigger schools	**35%**	I had/have a pretty good idea of what CC is all about	**85%**	I had/have a pretty good idea of what CC is all about	**91%**
	I didn't/don't know much about what CC is like	**26%**	I had/have a pretty good idea of what cc is all about	**85%**	I would be happy to get all of my education from a CC	**48%**	CC caters to a wide variety of interests	**74%**	I would use CC as a stepping stone to a better school	**61%**

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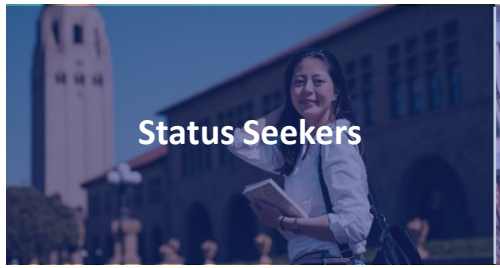
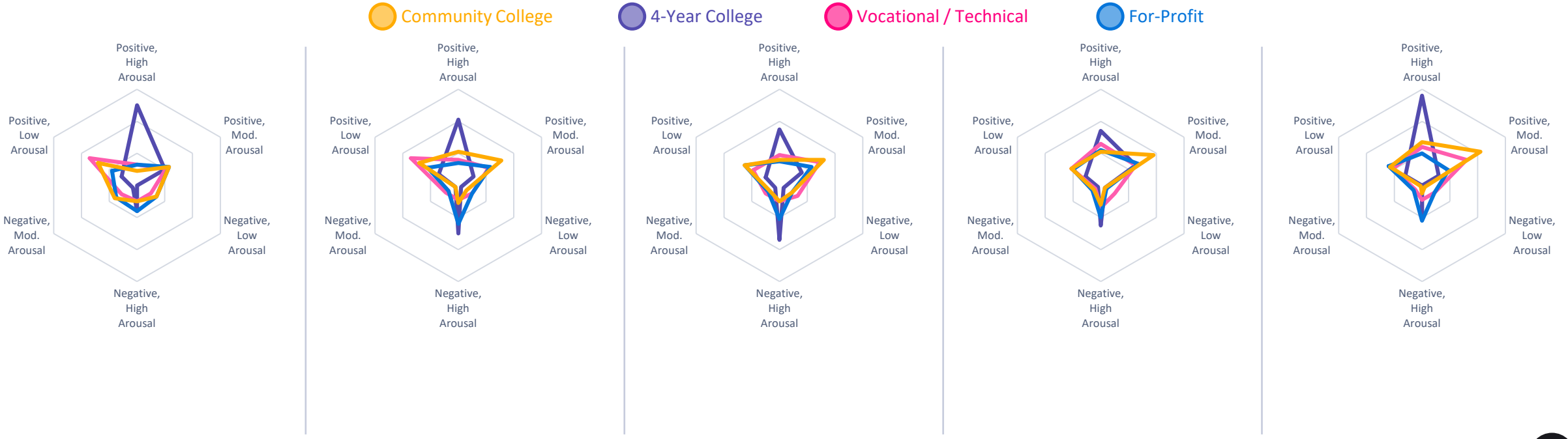
4-year university elicits the most positive emotions of all types of school across all segments, with Doubtful Drifters and Support-Seeking Graspers being exceptions.

Emotional Circumplex





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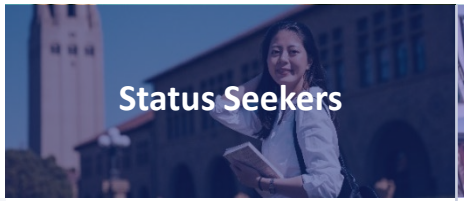
The majority of current students are taking on-campus classes, with online courses as a distant second across all segments.

Current Type of Students



	Status Seekers	Pragmatic Skillers	Doubtful Drifters	Support-Seeking Graspers	Proud Pupils
Currently Enrolled	**54%**	**41%**	**41%**	**54%**	**52%**
Types of Classes Taking (Among those currently enrolled)	On-campus classes **72%**	On-campus classes **68%**	On-campus classes **64%**	On-campus classes **71%**	On-campus classes **89%**
	Online-only classes **26%**	Online-only classes **29%**	Online-only classes **30%**	Online-only classes **26%**	Online-only classes **20%**
	Vocational classes **5%**	Vocational classes **7%**	Vocational classes **12%**	Vocational classes **8%**	Vocational classes **5%**

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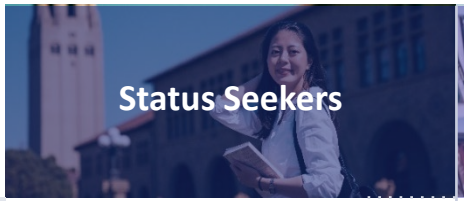
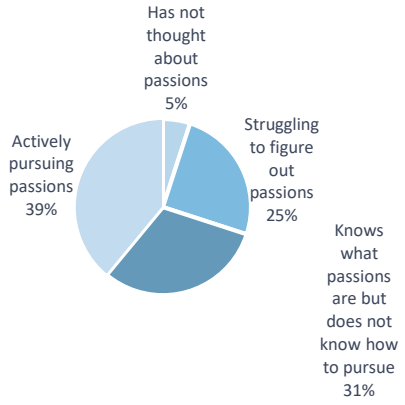
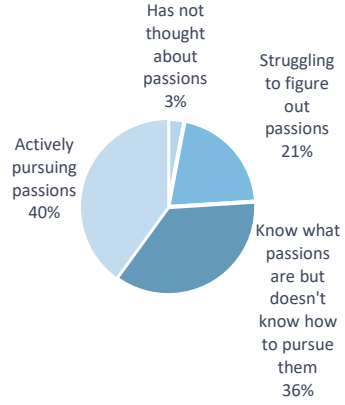
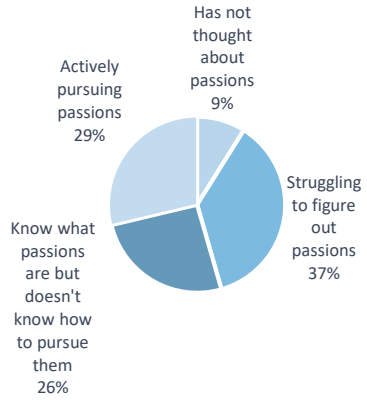
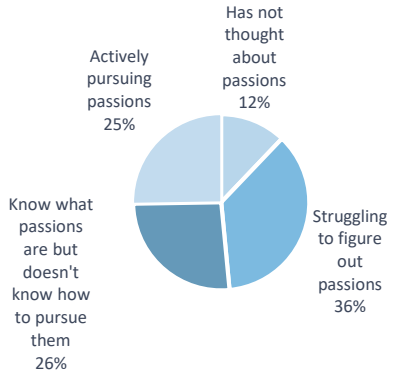
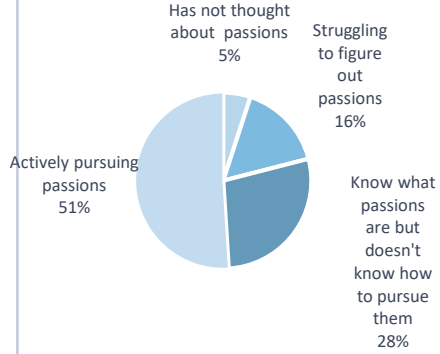
All segments view a Bachelor's degree as essential for their goals. Status Seekers, Pragmatic Skillers, and Proud Pupils know what their passions are, while other segments struggle.

Current Type of Students (cont'd)



	Status Seekers	Pragmatic Skillers	Doubtful Drifters	Support-Seeking Graspers	Proud Pupils
Essential Degree	Bachelor's Degree **65%**	Bachelor's Degree **56%**	Bachelor's Degree **43%**	Bachelor's Degree **55%**	Bachelor's Degree **71%**
	Master's Degree **52%**	Master's Degree **43%**	Master's Degree **34%**	Master's Degree **43%**	Master's Degree **57%**
	Certificate from a community college **17%**	Certificate from a community college **34%**	Certificate from a vocational or technical school **26%**	Certificate from a community college **31%**	Certificate from a community college **45%**
Passion					

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Proud Pupils have the largest proportion of Current LA 19 Students. Status Seekers are most likely to have attended or are currently attending a for-profit school.

Subgroup Makeup

	Status Seekers	Pragmatic Skillers	Doubtful Drifters	Support-Seeking Graspers	Proud Pupils
Current LA 19 Students	10%	18%	12%	15%	31%
Other LA 19 Students	1%	3%	1%	4%	3%
Lapsed LA 19 Students	0%	1%	3%	3%	2%
Skills Builders	0%	1%	0%	0%	0%
Current or Recent Student at For-Profit or Market-Driven Non-Profit Institution	20%	4%	16%	12%	6%
Automation-Risky	20%	28%	30%	32%	34%
Career-Switchers	30%	34%	35%	33%	38%
High School No Post-Secondary Education	11%	23%	23%	25%	19%

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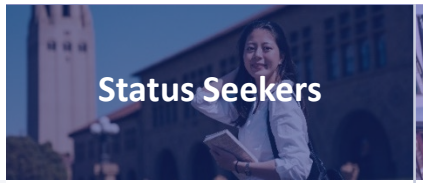
All segments are nervous about automation, but Doubtful Drifters are less likely to have taken steps to address its impact.

Automation & Strong Workforce



	Status Seekers		Pragmatic Skillers		Doubtful Drifters		Support-Seeking Graspers		Proud Pupils	
Aware of Automation	**55%**		**59%**		**59%**		**53%**		**49%**	
In Auto-Risky Jobs	**20%**		**28%**		**30%**		**32%**		**34%**	
How Does Automation Make You Feel?	Hopeful: **14%**		Hopeful: **12%**		Hopeful: **16%**		Hopeful: **17%**		Hopeful: **13%**	
	Nervous: **53%**		Nervous: **53%**		Nervous: **53%**		Nervous: **50%**		Nervous: **49%**	
Action Against Automation	Taken steps	**19%**	Taken steps	**24%**	Taken steps	**17%**	Taken steps	**25%**	Taken steps	**24%**
	Concerned, no steps	**39%**	Concerned, no steps	**31%**	Concerned, no steps	**46%**	Concerned, no steps	**39%**	Concerned, no steps	**31%**
	Not concerned	**42%**	Not concerned	**46%**	Not concerned	**37%**	Not concerned	**35%**	Not concerned	**45%**
Top 3 Major Considerations	Potential salary	**57%**	Passion/Interests	**60%**	Passion/Interests	**51%**	Passion/Interests	**45%**	Passion/Interests	**57%**
	Passion/Interests	**57%**	Potential salary	**50%**	Potential salary	**47%**	Work-life balance	**42%**	Potential salary	**50%**
	Work-life balance	**48%**	Work-life balance	**44%**	Work-life balance	**40%**	Potential salary	**40%**	Work-life balance	**38%**
Top 3 Industry Pursuing (Among those currently enrolled)	Something else	**18%**	Something else	**23%**	Something else	**22%**	Health Services	**19%**	Something else	**25%**
	Aerospace & Defense	**16%**	Social Sciences	**16%**	Business	**17%**	Business	**18%**	Health Services	**23%**
	Social Sciences	**15%**	ICT	**15%**	Social Sciences	**14%**	Something else	**18%**	Social Sciences	**15%**
Top 3 Program Interest	Entertainment & Digital Media	**33%**	Entertainment & Digital Media	**38%**	Entertainment & Digital Media	**40%**	Entertainment & Digital Media	**41%**	Health Services	**44%**
	Health Services	**32%**	Health Services	**33%**	Health Services	**33%**	Health Services	**40%**	Entertainment & Digital Media	**41%**
	ICT	**27%**	ICT	**28%**	ICT	**30%**	ICT	**30%**	ICT	**32%**

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Segments skew across all demographics – of note, Support-Seeking Graspers skew younger, lower income, and male, while Proud Pupils skew younger and Hispanic.

DEMOGRAPHICS

		Status Seekers	Pragmatic Skillers	Doubtful Drifters	Support-Seeking Graspers	Proud Pupils
GENDER	Male	48%	45%	49%	55%	45%
	Female	52%	55%	50%	45%	54%
AGE	18-24	46%	30%	36%	47%	46%
	25-34	34%	46%	41%	38%	37%
	35-40	20%	24%	24%	15%	17%
INCOME	Under $35,000	32%	45%	41%	44%	47%
	$35,000-$49,999	11%	17%	14%	21%	17%
	$50,000-$74,999	14%	17%	15%	19%	19%
	$75,000 or more	43%	21%	30%	15%	18%
PARENTS	% of HH with children	24%	30%	33%	24%	24%
	0-5 year olds	55%	63%	63%	63%	62%
	6-12 year olds	50%	53%	50%	56%	38%
	13-17 year olds	23%	22%	24%	25%	28%
ETHNICITY	Caucasian	38%	32%	36%	21%	19%
	African-American	6%	9%	6%	10%	8%
	Hispanic	30%	46%	43%	53%	64%
	Asian	25%	9%	12%	15%	7%
	Other	1%	5%	2%	1%	2%
EMPLOYMENT	Employed Full Time	48%	46%	46%	35%	38%
	Employed Part Time	19%	23%	26%	30%	30%
	Student	39%	26%	27%	37%	42%
	Unemployed/Homemaker/Other	4%	12%	9%	9%	7%
HOUSEHOLD	Average Household Size	3.1	3.3	3.4	3.4	3.7
	Average # of People Financially Supporting	1	1.3	1.5	1.3	1.3
	Living Situation (Unhoused)	10%	16%	11%	12%	10%

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APPENDIX

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Respondent Qualifications

Age 18-40

Currently lives in LA DMA

Must be employed, a homemaker, or student (includes unemployed students)

Has at least a high school degree and does not have post-graduate degree

If not currently enrolled, open to pursuing post-secondary education for themselves in the next 12 months

Must be aware of community colleges

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Subgroup Definitions

Current LA 19 Students

- Currently enrolled at one of the 19 local community colleges, taking at least 6 units
- Reason for taking classes at a community college is to transfer, obtain a degree, or obtain a certification

Total LA 19 Students

- Currently enrolled at one of the 19 local community colleges

Lapsed LA 19 Students

- Completed 1-2 semesters at one of the 19 local community colleges within the past 2 years but did not complete the program or obtain an Associate degree
- Not currently enrolled

Current or Recent Student at For-Profit or Market-Driven Non-Profit Institution

- Currently enrolled or completed coursework at a for-profit or market-driven non-profit institution such as Devry University, National University, Southern New Hampshire University, etc. within the past 12 months
- Includes both those who completed paid or free coursework

Automation-Risky

- Employed full time (at least 30 hours per week) or part time (less than 30 hours per week) in a recognized job at-risk for automation
- At least 50% of salary must come from the recognized automation-risky job
- Employed in the industry at-risk for automation for at least 1 year

Career-Switchers

- Employed full time (at least 30 hours per week) in a job not at-risk for automation
- Does not work multiple jobs
- Has been with current job for at least 1 year
- Interested in switching careers into a different industry. “Switching careers” excludes those looking for a promotion within their current employment

High School No Post-Secondary Education

- Completed high school
- Never enrolled in any post-secondary education

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Methodology

A total of 1,512 online and CAWI interviews were conducted in May 2019. Interviews averaging 15-20 minutes were sourced from nationally representative online panels as well as through on-campus recruiting. On-campus recruiting took place at Santa Monica College, Pasadena City College, East Los Angeles College, Mt. San Antonio College, Long Beach City College, and Cerritos College. Respondents were given the option of completing the survey in Spanish or English.

	Current LA 19 Students	Total LA 19 Students	Lapsed LA 19 Students	Current/Recent Student At For-profit/Market-driven Non-profit Institution	Automation Risky	Career Switcher	High School Graduate Only	Not In Pre-existing Subgroup	TOTAL SAMPLE
TOTAL	475	536	24	119	426	482	302	317	1,512

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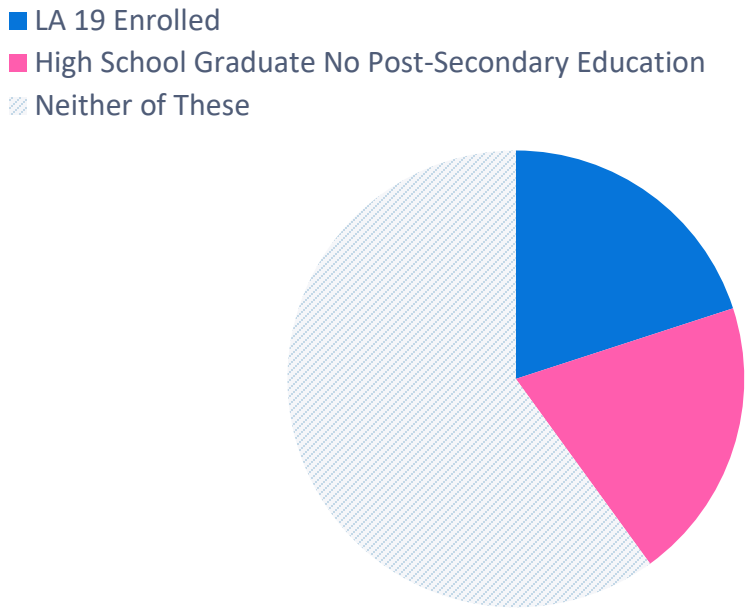
Data Weighting



Segment Solutions

Data has been weighted to be representative of key demographics (age and gender, ethnicity) for key subgroups. Current LA 19 Students and High School Graduates Only had minimum requirements for base size, and all other groups were allowed to fall-out naturally. This combination of minimum base size requirements and natural fallout was used in determining segment solutions.

Those currently enrolled in LA 19 were weighted according to information sourced from Datamart. High School Graduates Only and those who did not fall into either of those groups were weighted according to information sourced from LA demographic information. LACC Students, High School Graduates Only, and others were weighted to be proportional based on 2010 Census for LA DMA.

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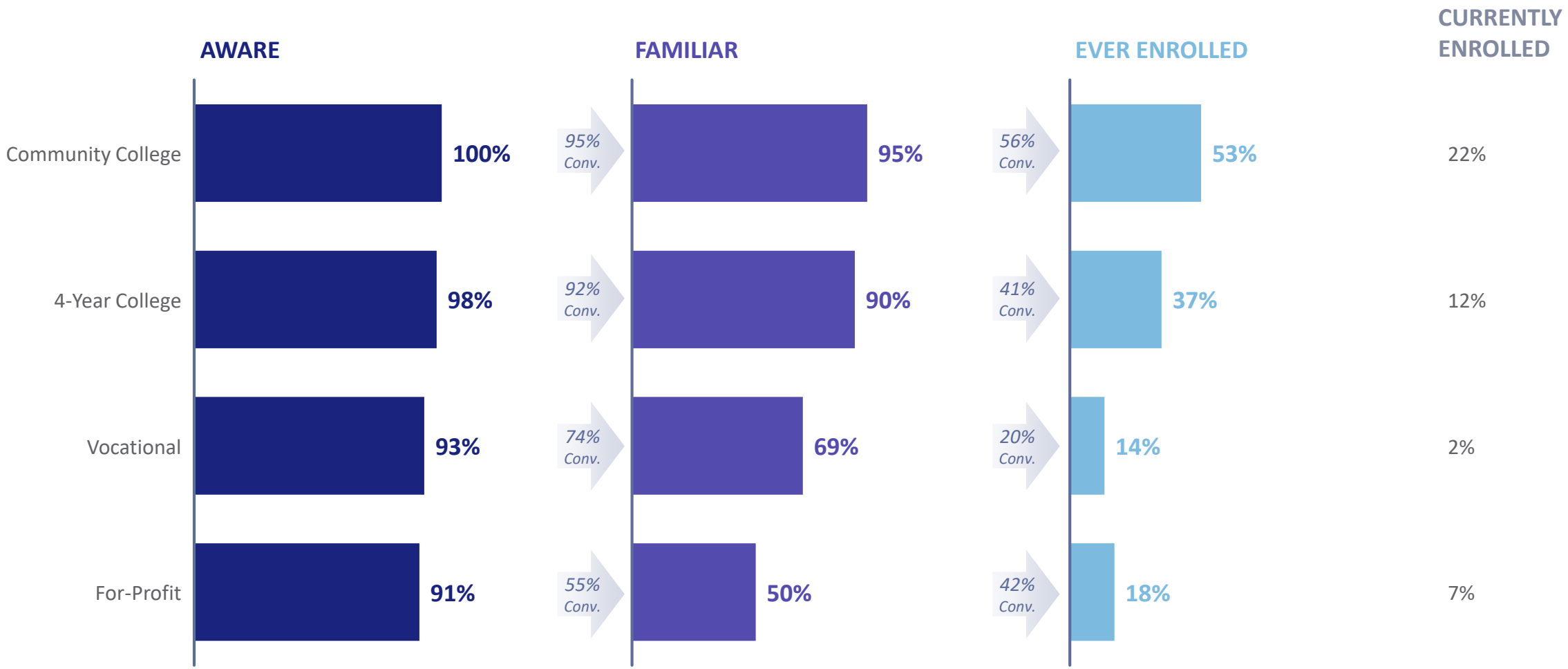
Post-Secondary Education Awareness (Overall)



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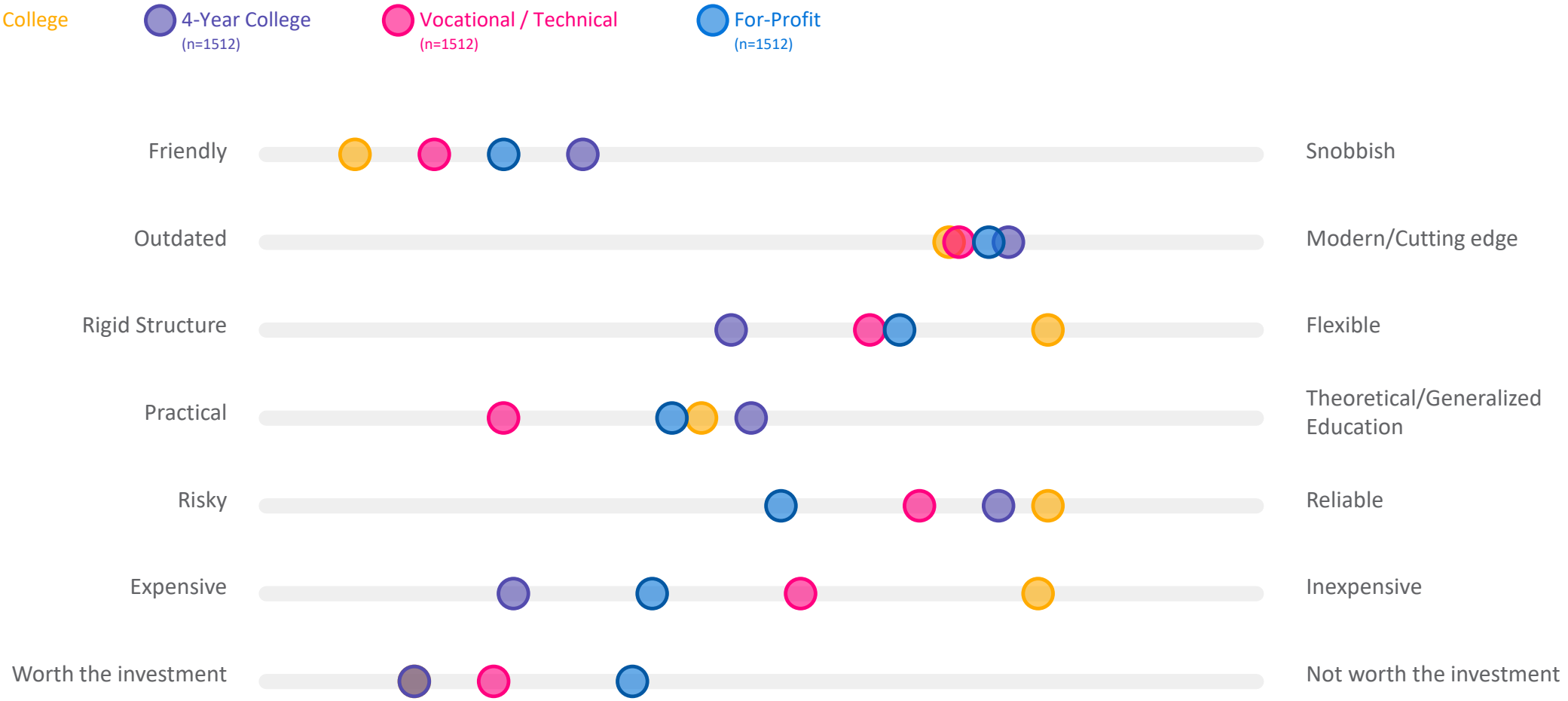
Community college is viewed as friendly, flexible, reliable, and inexpensive.

Post-Secondary Education Word Associations (Overall)



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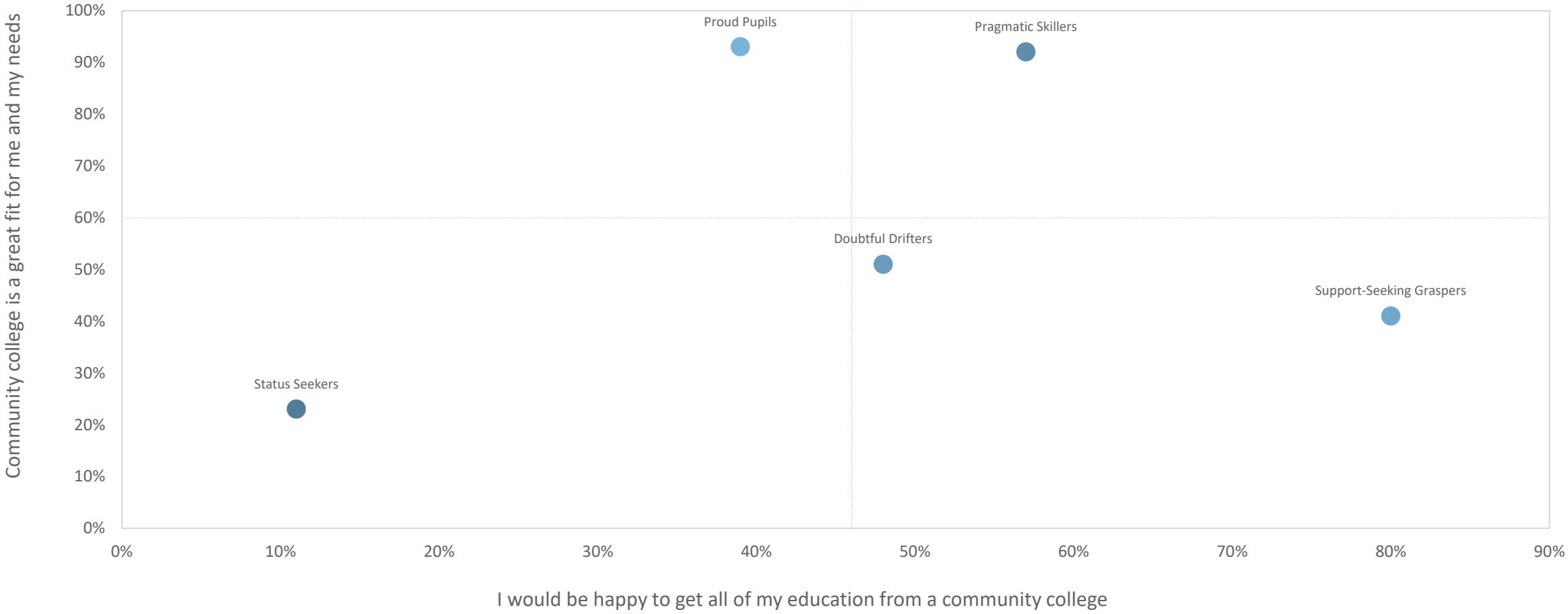
Openness to attending community college

Community College



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