



Community College of Philadelphia



**Community
College of
Philadelphia**

Community Scan Results

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Table Of Contents

<i>Methodology</i>	1
Purpose	1
Goals Of Scan	1
Sample Frame.....	2
Reliability Estimation.....	4
Instrument Design.....	4
Data Collection.....	4
Data Analysis	4
Report Generation.....	5
<i>Executive Summary</i>	6
Awareness And Familiarity.....	6
Perceived Market Niche.....	6
Market Segments.....	7
Information Sources	7
Parents’ Perceptions.....	7
<i>Community Image</i>	9
Awareness.....	9
Market Niches For Community College of Philadelphia.....	12
Attitudinal Issues.....	15
Information Recall.....	19
<i>Potential Market Segments</i>	22
<i>Computer Usage For Market Segments</i>	27
<i>Media Usage By Market Segment</i>	29
<i>Market Segment Characteristics</i>	31
<i>Parents’ Attitudes</i>	36
<i>Appendices</i>	38
Appendix A. Questionnaire.....	A-1
Appendix B. Tabular Results By Classification.....	B-1
Appendix C. Tabular Results By Service Area	C-1
Appendix D. Detailed Verbatim Responses	D-1

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Methodology

Purpose

Community College of Philadelphia was interested in conducting primary market research to assist them in defining the future direction needed to serve the potential markets for the College and define its image, given market changes since a similar Community Scan was done in 2000. Through this research, the College wants to gain a clear perspective on the overall image of the institution, the educational needs of the communities it serves and how people in the communities obtain information about Community College of Philadelphia. Specifically, the goals of the project included:

- Measure and evaluate perceptions of both Community College of Philadelphia and alternative higher education providers among residents and prospective students in the service area and how those perceptions have changed in the last five years
- Determine attendance potential for the market areas for various market segments in the geographic region served by the College
- Identify how various communities within the geographic market area obtain information about Community College of Philadelphia and how to better communicate with them

To accomplish the defined goals, CLARUS Corporation conducted essential market research with one of the main markets of the College — adults in the marketplace. The image of the College with the nontraditional, adult market was evaluated and market-potential benchmarks established and measured against the 2000 Community Scan. Emphasis was given to defining the competitive niche for the College and evaluating how well the College is meeting the needs of adult students, as well as measuring the market potential for adult learners. The results of this analysis identified market opportunities for the College among the adult population. It pinpointed areas in which the College is excelling in meeting market needs and areas in which the College should place renewed emphasis. The results of the Community Scan will assist Community College of Philadelphia in defining opportunities for additional enrollment of nontraditional students.

Goals Of Scan

To determine how the Community College of Philadelphia can best meet the current and future needs of the adults in its service region and to define its current image and positioning, a broad-based community survey was administered by telephone to determine the market needs in the service area of the Community College of Philadelphia. Specifically, the research questions for the survey included:

- What is the awareness and familiarity of Community College of Philadelphia and its competitors?
- How do the citizens rate the Community College of Philadelphia as compared to its competitors and the four-year universities on key market position indicators? What is the College's perceived niche in the market?
- What are the current plans of the adults for educational attainment in the service area? How likely are they to attend Community College of Philadelphia?
- How much does the market know about the programs and services of the College?
- What things do the consumers consider most important when choosing a college and when evaluating Community College of Philadelphia?
- Where do the respondents get information about colleges? What are those information needs?
- What is the perception of parents regarding their children's college attendance generally and the Community College of Philadelphia in particular?

- What are the demographic profiles of those who are likely to attend Community College of Philadelphia?

Sample Frame

The population of interest for this part of the research project was the households in the service area of Community College of Philadelphia. The city of Philadelphia comprises the service area. In the 2000 study, after interviewing college personnel, it was evident that the service area of Community College of Philadelphia was very diverse, as it is still in 2005. Recognizing these differences, the sampling plan was based on the population of the neighborhoods comprising Philadelphia which have been outlined by the Institutional Research Office of Community College of Philadelphia as its service area. For the 2005 study, the same neighborhoods and zip codes were used for the sample frame and the household counts for each were updated. The final sample frame was developed in consultation with the Community College of Philadelphia after the first visit. In reporting results, the service area was then split into geographic regions that match the defined service areas for the College, which also provides the ability to compare to the results of the 2000 Community Scan.

A list of households and telephone numbers was randomly selected from the total households in the service area across the zip codes for the neighborhoods in Philadelphia. This provided stratification of the sample by geographic location and a representative sample of the service area based on the population of households across the service area. A summary of the zip codes, broken down into neighborhoods, the total number of households and the final sample numbers for the service area for both the 2000 and 2005 study are presented in Exhibit 1.

Exhibit 1. Community Scan Sampling Frame

Neighborhood/ Zip Code	2000			2005		
	Total Households	Percent	Sample Frame	Total Households	Percent	Sample Frame
Center City (#1)						
19102	1,334	0.3%	1	2,195	0.4%	2
19103	5,990	1.4%	7	9,791	1.8%	9
19106	3,534	0.8%	4	5,015	0.9%	5
19107	2,436	0.6%	3	4,761	0.9%	4
<i>Subtotal</i>	<i>13,294</i>	<i>3.1%</i>	<i>15</i>	<i>21,762</i>	<i>4.0%</i>	<i>20</i>
South Philadelphia (#2)						
19112	25	0.0%	0	15	0.0%	0
19145	14,581	3.4%	17	17,202	3.2%	16
19146	11,015	2.5%	13	14,561	2.7%	14
19147	11,902	2.7%	14	14,892	2.7%	14
19148	16,449	3.8%	19	18,906	3.5%	17
<i>Subtotal</i>	<i>53,972</i>	<i>12.4%</i>	<i>63</i>	<i>65,576</i>	<i>12.1%</i>	<i>61</i>
Southwest Philadelphia (#3)						
19142	8,225	1.9%	9	9,936	1.8%	9
19143	19,724	4.5%	23	23,960	4.4%	22
19153	3,560	0.8%	4	4,418	0.8%	4
<i>Subtotal</i>	<i>31,509</i>	<i>7.3%</i>	<i>36</i>	<i>38,314</i>	<i>7.1%</i>	<i>35</i>
West Philadelphia (#4)						
19104	8,403	1.9%	10	12,461	2.3%	12
19131	12,280	2.8%	14	15,559	2.9%	14
19139	12,271	2.8%	14	15,360	2.8%	14
19151	9,649	2.2%	11	11,448	2.1%	11
<i>Subtotal</i>	<i>42,603</i>	<i>9.8%</i>	<i>49</i>	<i>54,828</i>	<i>10.1%</i>	<i>51</i>

Neighborhood/ Zip Code	2000			2005		
	Total Households	Percent	Sample Frame	Total Households	Percent	Sample Frame
Lower North Philadelphia (#5)						
19121	8,259	1.9%	10	12,146	2.2%	11
19122	3,765	0.9%	4	5,478	1.0%	5
19123	2,447	0.6%	3	4,162	0.8%	4
19130	7,080	1.6%	8	9,634	1.8%	9
<i>Subtotal</i>	21,551	5.0%	25	31,420	5.8%	29
Upper North Philadelphia (#6)						
19132	12,128	2.8%	14	15,609	2.9%	14
19133	6,420	1.5%	7	9,004	1.7%	8
19140	14,698	3.4%	17	18,862	3.5%	17
<i>Subtotal</i>	33,246	7.7%	38	43,475	8.0%	39
Kensington, Richmond, Bridesburg (#7)						
19125	6,788	1.6%	8	8,543	1.6%	8
19134	15,852	3.6%	18	20,401	3.8%	19
19137	2,818	0.6%	3	3,290	0.6%	3
<i>Subtotal</i>	25,458	5.9%	29	32,234	5.9%	30
Roxborough, Manayunk (#8)						
19127	2,132	0.5%	2	2,465	0.5%	2
19128	12,493	2.9%	14	14,138	2.6%	13
<i>Subtotal</i>	14,625	3.4%	16	16,603	3.1%	15
Germantown, Chestnut Hill (#9)						
19118	3,342	0.8%	4	3,692	0.7%	3
19119	8,893	2.0%	10	10,432	1.9%	10
19129	3,376	0.8%	4	4,122	0.8%	4
19138	10,262	2.4%	12	12,093	2.2%	11
19144	11,271	2.6%	13	15,310	2.8%	14
19150	8,269	1.9%	9	9,513	1.8%	9
<i>Subtotal</i>	45,413	10.5%	52	55,162	10.2%	51
Oak Lane, Olney (#10)						
19120	17,225	4.0%	20	21,131	3.9%	20
19126	4,128	1.0%	5	5,480	1.0%	5
19141	8,345	1.9%	10	10,753	2.0%	10
<i>Subtotal</i>	29,698	6.8%	35	37,364	6.9%	35
Near Northeast (#11)						
19111	18,316	4.2%	21	21,648	4.0%	20
19124	17,261	4.0%	20	21,313	3.9%	20
19135	10,185	2.3%	12	11,677	2.2%	11
19136	10,492	2.4%	12	12,410	2.3%	12
19149	15,894	3.7%	18	18,250	3.4%	17
19152	10,121	2.3%	12	11,861	2.2%	11
<i>Subtotal</i>	82,269	18.9%	95	97,159	17.9%	91
Far Northeast (#12)						
19114	10,261	2.4%	12	12,244	2.3%	11
19115	10,282	2.4%	12	12,396	2.3%	11
19116	9,456	2.2%	11	11,247	2.1%	10
19154	10,885	2.5%	12	12,125	2.2%	11
<i>Subtotal</i>	40,884	9.4%	47	48,012	8.9%	43
TOTALS	434,522	100.0%	500	541,909	100.0%	500

Reliability Estimation

The reliability estimation for the sample was based on the number of households by region to the total sample size. Five hundred surveys were completed across the service region for Community College of Philadelphia. A sample of 500 households provided a reliability of 95 percent and a tolerable error of ± 4.4 percent. In other words, if 100 different samples of 500 consumers in the service area were chosen randomly, 95 times out of 100 the results obtained would vary no more than ± 4.4 percentage points from the results that would be obtained if all of the residents in the service area were interviewed.

Instrument Design

On the basis of information gained during interviews with Community College of Philadelphia staff and management during the first visit to the campus, a draft of a telephone survey was developed and presented to the Management Team at the College for review. Both CLARUS Corporation and the Community College of Philadelphia personnel reviewed this draft in detail for additions, deletions and revisions. Several questions were duplicated from the 2000 Community Scan to allow for comparisons and benchmarks. A copy of the final questionnaire is presented in Appendix A.

It was the responsibility of CLARUS Corporation to write and sequence the questions in such a way that any respondent bias was minimized and the questions were technically correct. The final survey was pretested to ensure that question wording and sequencing were structured as needed. The questionnaire consisted of a few open-ended questions, many multichotomous questions and rating scales.

Data Collection

Telephone surveys were the primary method of data collection for this part of the research project and lasted approximately 20 minutes per interview. The interviews were conducted from October 10 to 26, 2005. Interviewers from CLARUS Corporation who have previous experience in educational services interviewing conducted these interviews. Five hundred surveys were completed.

The interviewers conducting the telephone interviews were subjected to rigorous hiring and training procedures before making their first phone call. Before interviewing began, the interviewers went through a thorough question-by-question briefing of the questionnaire. During actual interviewing, each interviewer was monitored for one complete questionnaire and monitored randomly thereafter by the shift supervisor.

The interviewers are trained to minimize nonresponse errors. The two main sources of nonresponse bias are not-at-homes and refusals. Interviewers tried a phone number five to seven times during the course of the week at varying days and times to minimize the not-at-home errors. The introduction was structured to attempt to minimize the refusals and has successfully done so in past educational surveys. Our experience indicates that consumers are more than willing to share their opinions about their local colleges.

Data Analysis

After the data were collected, verification of the data began. The data were examined to ensure that procedures were followed in data collection and checked for internal validity by cross-matching answers per respondent. The data were then coded for processing and analysis. SPSS (Statistical Package for the Social Sciences) was used to analyze the data and the data disks will be made available to Community College of Philadelphia for additional subset analyses upon completion of the project.

Report Generation

The results of the data are organized into a graphic and narrative report. The report focuses on the most meaningful findings of the research and will detail both the geographic responses and the potential market segment responses. To make reporting the results more meaningful in light of the diverse service area of the Community College of Philadelphia, four geographical regions were created which reflect the service areas of the Regional Centers and the main campus — Spring Garden, Northeast, Northwest and West. The regions were created based on the College's official defined service area zip codes for the regional centers and mirrored the 2000 Community Scan regions. The regions were created to determine if there were regional differences across the service area. Specifically, the zip codes for the regions include:

Northeast

- Comprised 22.8 percent of the sample with 114 interviews completed in the zip codes of 19111, 19149, 19152, 19136, 19114, 19115, 19116, 19154 and 19135. Reliability for this individual region is ± 9.2 percent. In 2000, the Northeast region comprised 23.8 percent of the sample with 119 interviews completed.

Northwest

- Comprised 16.0 percent of the sample with 80 interviews completed in the zip codes of 19119, 19150, 19138, 19144, 19129, 19140, 19141 and 19126. Reliability for this individual region is ± 11.0 percent. In 2000, the Northwest region comprised 15.4 percent of the sample with 77 interviews completed.

West

- Comprised 16.4 percent of the sample with 82 interviews completed in the zip codes of 19131, 19151, 19139, 19143, 19142 and 19104. Reliability for this individual region is ± 10.8 percent. In 2000, the West region comprised 16.0 percent of the sample with 80 interviews completed.

Spring Garden

- Comprised 44.8 percent of the sample with 224 interviews completed in the remaining zip codes in the sample frame (includes: 19102, 19103, 19106, 19107, 19118, 19120, 19121, 19122, 19123, 19124, 19125, 19127, 19128, 19130, 19132, 19133, 19134, 19137, 19145, 19146, 19147, 19148 and 19153). Reliability for this individual region is ± 6.5 percent. In 2000, the Spring Garden region comprised 44.8 percent of the sample with 224 interviews completed.

The legends on the charts in the report are titled Spring Garden, Northeast, Northwest and West for those in which geographic regions are reported. Differences between the regions will be reported where they exist. A complete set of tabular results by frequency and percentage for each of the major classifications of this research is provided in Appendix B. Appendix C contains the tabular results for the geographic regions. The tabular results should serve as reference materials and should be consulted before important conclusions are made. Specific verbatim responses are automatically shortened for inclusion in the tabular results by the SPSS software. The verbatim responses are presented in complete detail in Appendix D.

Executive Summary

Awareness And Familiarity

The Community College of Philadelphia does not have the highest unaided recall and familiarity in the city of Philadelphia. In 2005, only 11 percent of the residents of the City mentioned the Community College of Philadelphia first as a college in the area and overall only 19 percent of the residents in the City mentioned Community College of Philadelphia at all as a college in the City. An increase has been seen in overall familiarity since the 2000 Community Scan in which only 13 percent of the residents of the City mentioned the Community College of Philadelphia at all as a college in the area. The residents in the City are the most familiar with Temple University and Drexel University.

The results of the unaided recall test and overall familiarity indicate that a major marketing awareness campaign is needed to increase the overall top of the mind awareness of the Community College of Philadelphia with the residents of the City.

Perceived Market Niche

For a majority of the colleges in the Philadelphia market, the residents used the word “excellent” to describe the colleges. “Excellent” was the word used to describe Temple University, LaSalle University and Penn State. Residents used the words “Ivy League” to describe the University of Pennsylvania and “engineering” was used to describe Drexel University. All of the keyword descriptors used for the four-year colleges had a connotation of quality. Not so for the Community College of Philadelphia. The key word used to describe the Community College of Philadelphia was “convenient” and other keyword descriptors used for the Community College of Philadelphia was “good,” “okay” and “cheap.”

The four-year colleges and universities in the Philadelphia market hold the market niche for high quality education. As with other community colleges across the country, the Community College of Philadelphia holds the market niche for affordability and convenience. The question facing the Community College of Philadelphia is what other characteristics the residents of the City should know immediately about the College – its market niche and the characteristics that differentiate the College from the other four-year colleges and universities in the market. Interestingly, when one asks the residents in the City about the Community College of Philadelphia directly, there are additional market niches held by the College. The residents in the City know that the Community College of Philadelphia is a great place for high school students who want to transfer, that credits will transfer to a four-year college, the student population is ethnically diverse, the College teaches the skills needed to get a job, and they believe that Community College of Philadelphia is providing such a needed educational service that the residents would support it.

The items that differentiate the Community College of Philadelphia and those which they do well must be defined with the various markets, such as providing skill sets for employment, source of employees and transferability and diversity, in addition to the current characteristics of affordability and convenience. The Community College of Philadelphia has to develop a branding platform that will provide the residents of the City the key differences about the College and distinguish the Community College of Philadelphia from the four-year colleges in a very positive manner. The differentiation must then be carried out in all communications by the College – from public relations to marketing communications to faculty conversations with students.

Market Segments

Overall, 45 percent of the residents in the City have an interest in education or job training in the next couple of years. Residents today are more likely to have an interest in education and job training than five years ago when only 33 percent of the residents in the City reported an interest. The majority of the market segment interested in education is interested in obtaining a college degree and residents are most likely to enroll at the Community College of Philadelphia and Temple University. Nursing, other programs in the medical field, computers, business and education are the program areas of most interest to those interested in education and training.

The Community College of Philadelphia must aggressively market and communicate the availability of these program areas to the market interested in education and training. The College must embark on a systematic campaign which will inform adults of the programs offered at the Community College of Philadelphia and how the College is the best entry point for their career aspirations. The development of a career focus magazine should be done and distributed to all households in the City prior to each semester to emphasize the programming offered at the College, as well as the convenient ways the adults can achieve those educational goals.

Information Sources

From 2000 to 2005, the Community College of Philadelphia heavily invested in bus and transit advertising based on two factors – it was a key medium to reach potential students based on research results in the 2000 Community Scan and the College could heavily penetrate the market with the funds available. The Community College of Philadelphia “owned” the bus and transit segment and it paid off with respect to an increase in recall of the information presented via bus and transit from 2000 to 2005. However, to increase overall awareness and familiarity among the market to a higher level, a higher level of support will be needed for the marketing communications plan. Additional funding for media will be needed to increase the overall familiarity and awareness of the market based on the current awareness of information sources seen in the 2005 Community Scan.

However, a key factor for the future is the use of media to drive potential students to the Web site. There have been increases in the penetration of home computers and Internet connections in the City since 2000. Almost half of the residents interested in education and job training are most likely to go to a college’s Web site to request information. About one-third will call the College for information and one-fifth will visit the College. It is extremely important that the Web site continue to be a major source of “correct” and “current” information about the Community College of Philadelphia. It is anticipated that the majority of the marketing communications should drive the residents to the College’s Web site for additional information. Keeping the Web site up-to-date and extremely user friendly will become a key piece of implementing the new branding campaign. In addition, the College has to examine new ways to use technology to assist the College in serving students. For example, national research indicates that radio listenership is declining among the high school students in favor of music downloaded to personal listening devices. Cell phone ownership has increased, along with new generations of cell phones with Internet and video capabilities. The Community College of Philadelphia must begin to utilize these new technologies in its overall communications plans.

Parents’ Perceptions

There have been increases in the number of households with high school age children in the Philadelphia market from the 2000 to the 2005 Community Scan. As seen nationally, all parents expect their children to attend college, but the question in the Philadelphia market is whether the parents will have the Community College of Philadelphia on the list of college choices for their children. There has been a slight decrease from 2000 to 2005 in the percentage of parents who would be likely to encourage their children to attend the Community College of Philadelphia. Those who were unlikely to encourage their children to attend the College

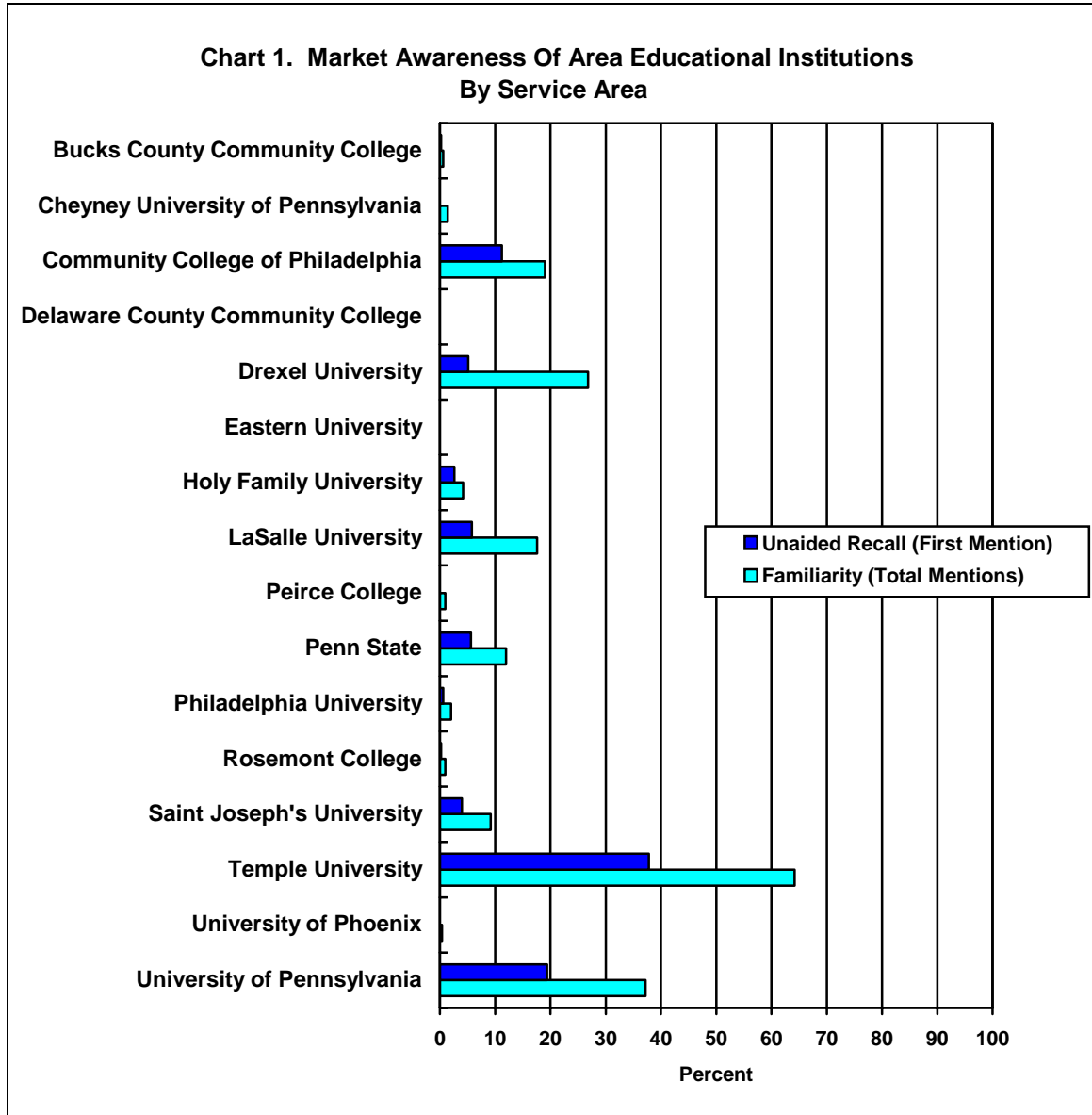
indicated they wanted their children to attend a four-year college, wanted them to travel and that their children have a higher potential than a community college education.

- As seen with the overall image of the residents in the City, there is also a perception among parents that the Community College of Philadelphia is only affordable and convenient. A direct marketing campaign needs to be addressed to the parents of the high school students in the City that emphasizes the dual-enrollment programs with Temple University and Drexel University (perceived as very high quality institutions) and the caliber of Community College of Philadelphia students enrolling in these programs. But overall, the same image issues have to be addressed for the parents as for the community members at large for the Community College of Philadelphia over the next few years.

Community Image

Awareness

The more aware members of the community are with a college and the more favorable that image, the easier it is for that college to market its programs and services to consumers. If consumers are not aware of the college, the college is not held in top-of-the-mind awareness and is not thought of favorably, the job of marketing the college becomes more difficult.



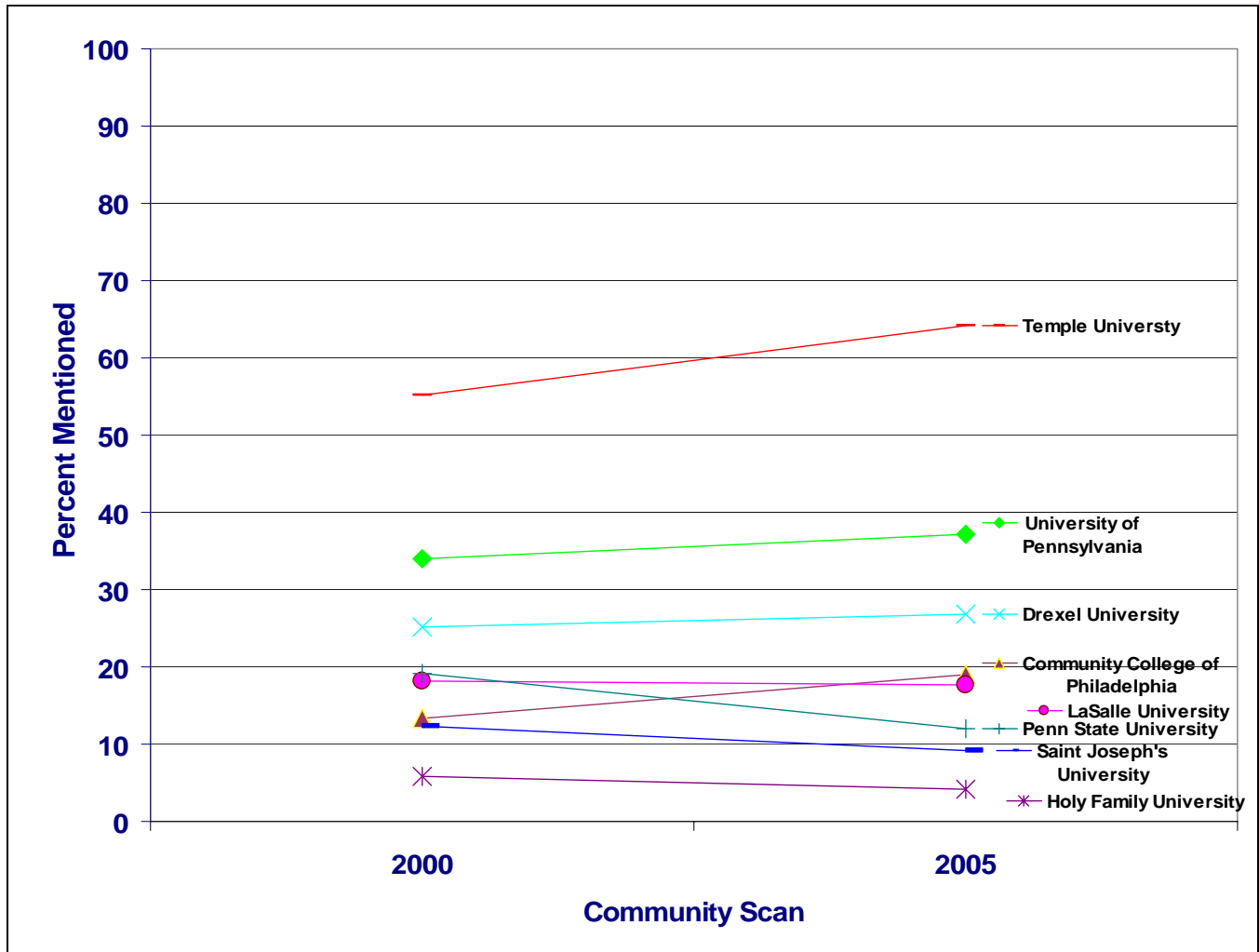
Unaided Recall. The best test of awareness is a test of unaided recall. Immediately after securing permission from the respondents to proceed with the survey, the first question asked of the respondents in the service area was to name the area colleges that come to mind. At no time was Community College of Philadelphia identified to bias the initial responses. Chart 1 presents the percentage of respondents who mentioned a specific college first and detailed in the “Unaided Recall (First Mention)” bars.

The Community College of Philadelphia does not have the highest overall unaided recall with the residents in the service area of the Community College of Philadelphia. Temple University was mentioned first in the test of unaided recall by 38 percent of the residents in the City. The University of Pennsylvania had the next highest recall in the first mention with 19 percent of the residents in the City mentioning the University of Pennsylvania. Eleven percent of the residents of the City first mentioned the Community College of Philadelphia. The remainder of the colleges in the service area were mentioned first in the test of unaided recall by less than 10 percent of the residents of the City. Six percent mentioned LaSalle University first, 5.6 percent mentioned Penn State first, 5.1 percent mentioned Drexel University first, four percent mentioned Saint Joseph's University and three percent mentioned Holy Family University.

Familiarity. Another test of image for a college is the overall familiarity residents in the service area have with a college. Again, Community College of Philadelphia is one of the most familiar colleges overall in the city but certainly not the most familiar. Chart 1 also presents the results of the overall familiarity of the residents in the City with Community College of Philadelphia and the other area colleges. This was tabulated by adding all the residents who mentioned Community College of Philadelphia as one of the responses in the test of unaided recall. As seen by the "Familiarity (Total Mentions)" bar in Chart 1, 19 percent of the residents in the City mentioned Community College of Philadelphia as a college in the area, but 64 percent of the residents mentioned Temple University.

Thirty-seven percent of the residents in the City were familiar with the University of Pennsylvania, and 27 percent were familiar with Drexel University. Eighteen percent were familiar with LaSalle University and 12 percent of the residents of the City were familiar with Penn State. Less than nine percent of the residents are familiar with Saint Joseph's University and less than five percent are familiar with Holy Family University.

Chart 2. Changes In Familiarity For Area Educational Institutions, 2000 To 2005



The good news for the Community College of Philadelphia is that they have seen an increase in overall familiarity from 2000 to 2005, as seen in Chart 2. In 2000, 13 percent of the residents of the City recalled the Community College of Philadelphia and by 2005 that has increased to 19 percent, as seen in Chart 2. The majority of the colleges have seen increases in familiarity in the last five years, as seen in Chart 2. Although Temple University was the most familiar to the residents of the City in 2000 with 55 percent of the residents recalling the University, the familiarity of Temple University increased to 64 percent of residents recalling it by 2005. Other slight increases in familiarity were seen for the University of Pennsylvania (34 percent to 37 percent in 2005) and Drexel University (25 percent to 27 percent).

In 2000, 18 percent of the residents in the City mentioned LaSalle University and the familiarity stayed the same for 2005. Decreases in familiarity were seen from 2000 to 2005 for Penn State (19 percent in 2000 to 12 percent in 2005), Saint Joseph's University (12 percent in 2000 to 9 percent in 2005) and Holy Family University (6 percent in 2000 to 4 percent in 2005).

Market Niches For Community College Of Philadelphia

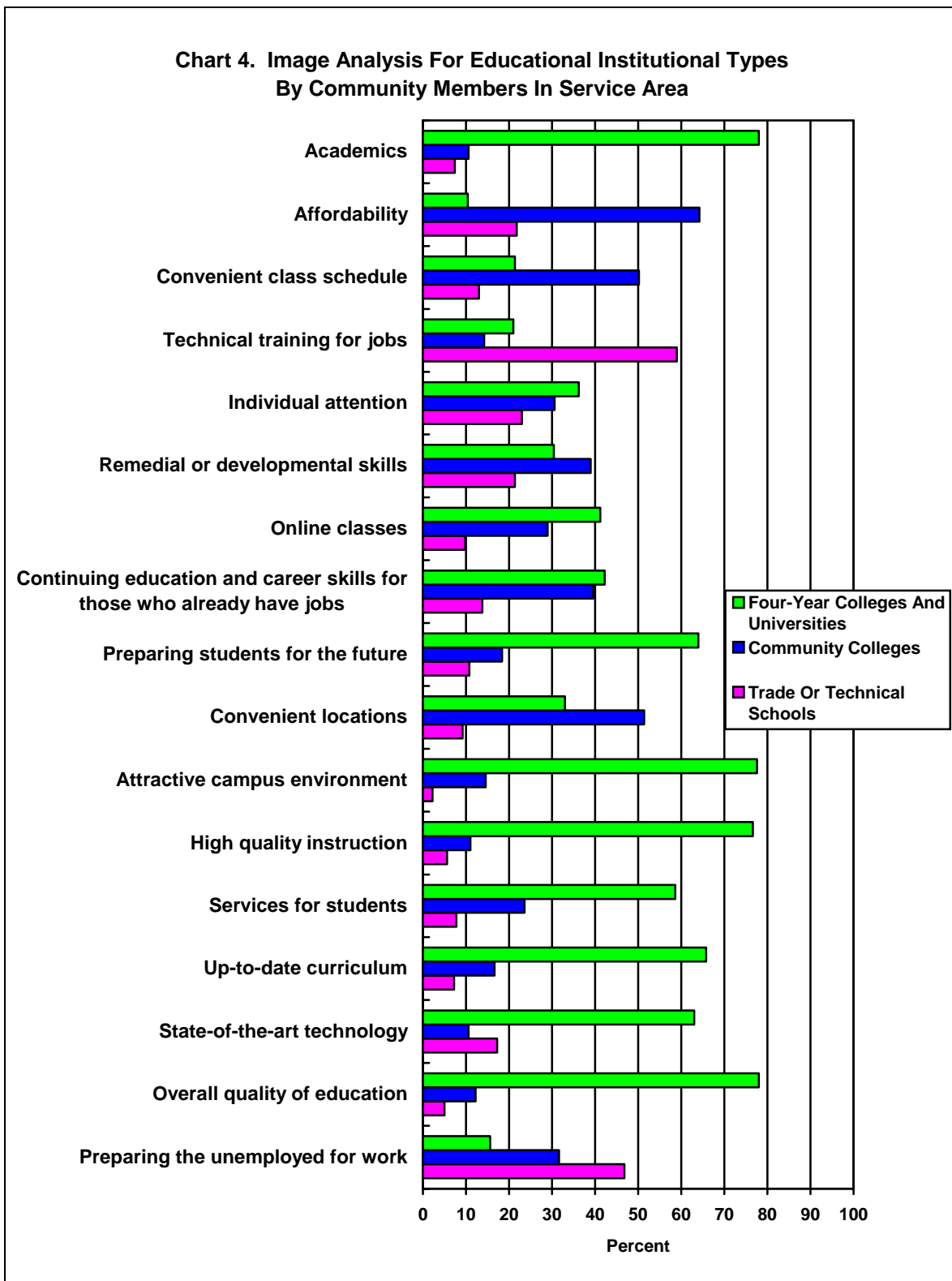
Image Key Word Descriptors. As the respondents to the survey mentioned colleges in the area, they were also asked what word or phrase they would use to describe each college mentioned. The results of the keyword descriptors used by the residents in the City are shown in Chart 3 and one should note that the keyword descriptors are residents “perceptions” and may not be the reality known to educational administrators. However, it is very important to understand how the residents describe the colleges in light of the messages which need to be created for the Community College of Philadelphia.

**Chart 3. Key Word Image Descriptors For Area Educational Institutions
By Community Members In Service Area**

COLLEGE	KEY WORDS
Community College of Philadelphia	Convenient Good, Okay, Cheap
Temple University	Excellent Good, Large, Local, Best, Diverse, Inner City, Medical, Urban
University of Pennsylvania	Ivy League Excellent, Prestigious, Very Good, Good, Great
Drexel University	Engineering Excellent, Good, Academic, Technical
LaSalle University	Excellent Good, Very Good, Small, Catholic
Penn State	Excellent Good, Ivy League
Saint Joseph’s University	Good Excellent, Local, Very Good, Catholic
Holy Family University	Local Good

For a majority of the colleges mentioned, the word “excellent” was used as the key descriptor, as seen in Chart 3. “Excellent” was the key word used to describe Temple University, LaSalle University and Penn State. “Ivy League” was the key word descriptor used for the University of Pennsylvania and “engineering” was the key word descriptor used for Drexel University. The key word used to describe Saint Joseph’s University was “good” and the key word for Holy Family University was “local.” The Community College of Philadelphia holds the market position of “convenient,” as seen in the key word descriptors in Chart 3. The issue facing the Community College of Philadelphia is whether “convenient” is the main key word descriptor that the College wants the residents to use. Other key word descriptors used for the Community College of Philadelphia include “good,” “okay” and “cheap.”

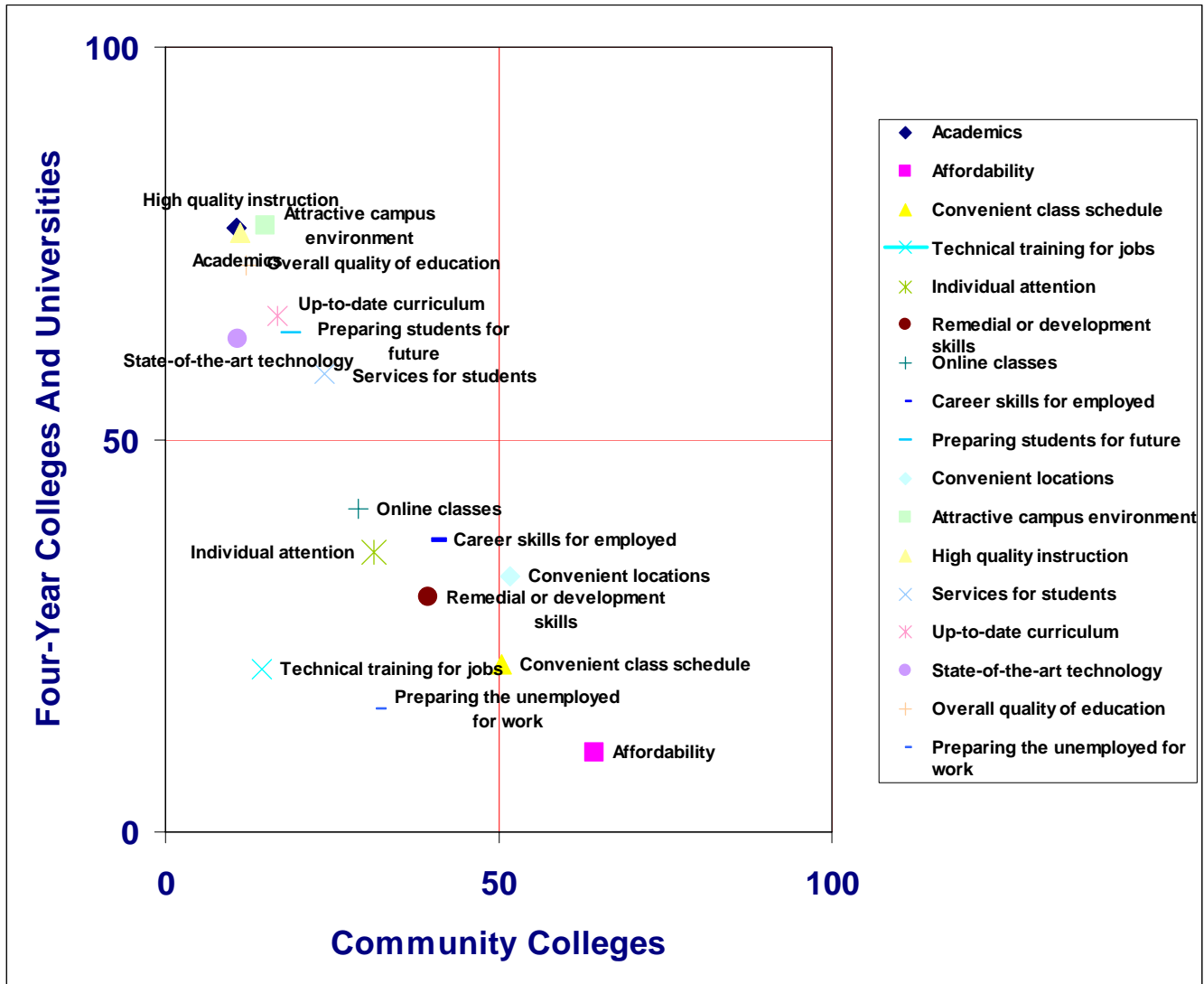
Image Analysis. To better understand the marketing messages needed to clearly define the Community College of Philadelphia in the service area, it is important to understand what market niches the College currently holds with respect to the residents in the City and in relation to the other colleges in the area. A list of common educational descriptors was read to the respondents and the respondents were asked to indicate what type of educational institution was best known for each characteristic. Only by understanding the position of Community College of Philadelphia in the marketplace can the marketing communications begin to support or redirect those market niches.



Survey respondents were asked to identify whether a list of common educational characteristics could be attributed to a four-year college or university, community colleges or trade or technical schools and the results are presented in Chart 4. As seen in Chart 4, the characteristics attributed to a four-year college or university by more than half of the respondents included overall quality of education (78 percent), academics (78 percent), attractive campus environment (78 percent), high quality instruction (77 percent), up-to-date

curriculum (66 percent), preparing students for the future (64 percent), state-of-the-art technology (63 percent) and services for students (59 percent). The only characteristics attributed to community colleges by more than half of the respondents in the City included affordability (64 percent), convenient locations (51 percent) and convenient class schedule (50 percent). The only characteristic attributed to the trade or technical schools was technical training for jobs (59 percent).

Chart 5. Image Analysis Of Community Colleges Versus Four-Year Colleges And Universities By Community Members

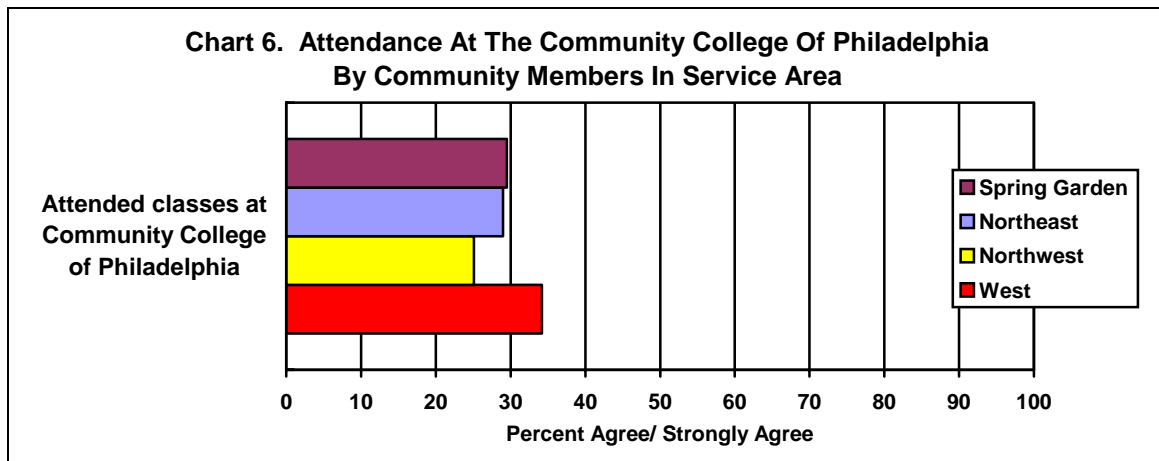


To understand the positioning of Community College of Philadelphia in relation to the four-year colleges and universities in the service area, the percentage of residents which attributed a characteristic to each type of educational institution are plotted for the community colleges and the four-year colleges and universities. As seen in Chart 5, the characteristics which are found in the upper left quadrant define the image of the four-year colleges and universities. Specifically, the residents in the market define the market position of the four-year colleges and universities as high quality of instruction, attractive campus environment, academics, overall quality of education, up-to-date curriculum, state-of-the-art technology, preparing students for the future and services for students. The lower right quadrant is the quadrant which defines the market position of the community colleges in the market. The characteristics making up the market position for the community colleges include affordability, convenient class schedule and convenient locations. The question for the

Community College of Philadelphia is whether or not these are the characteristics that the College wants the residents in the City to attribute to the College.

Attitudinal Issues

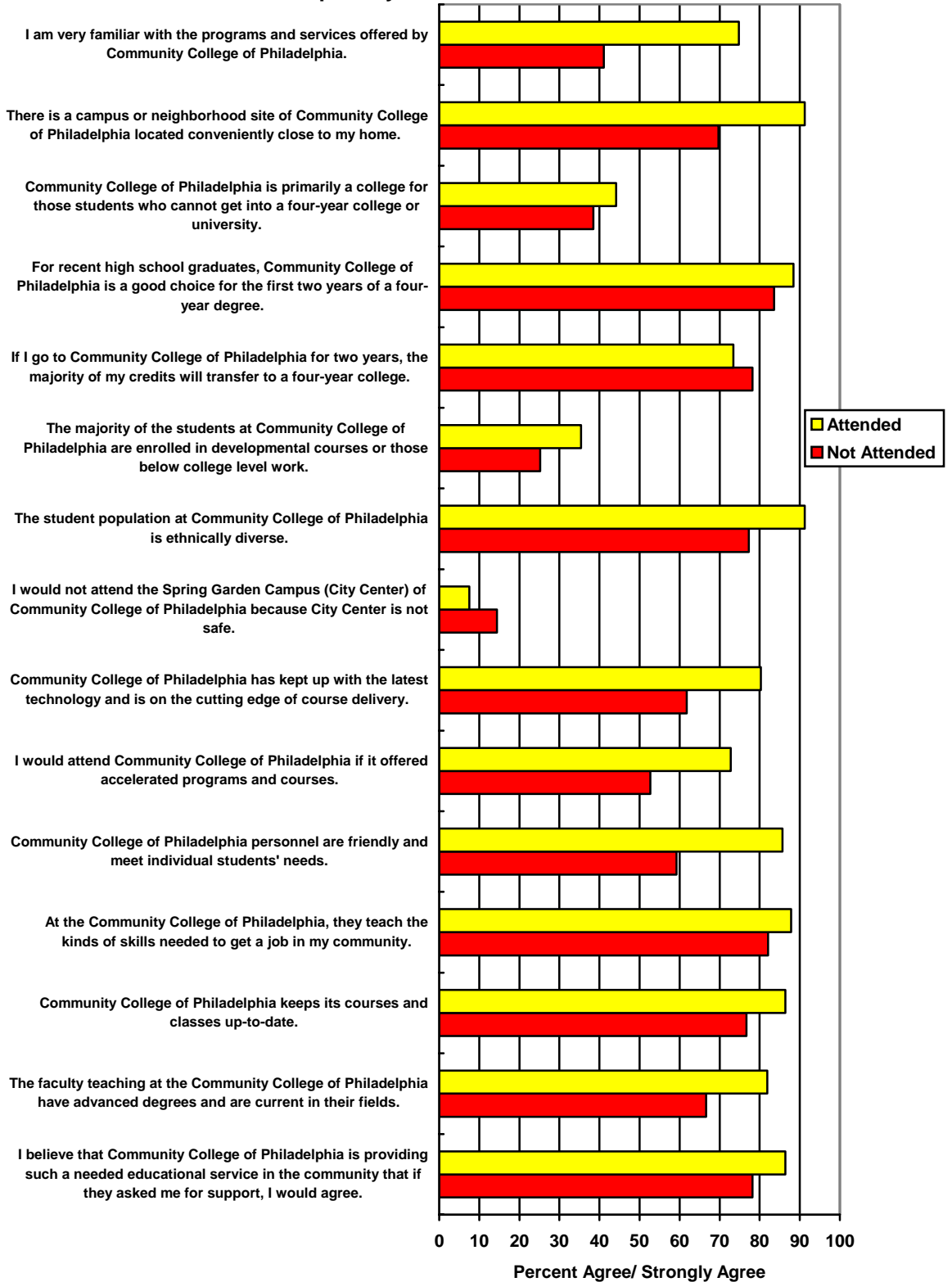
People hold many attitudes toward a community college that they use to define the community college to other people. In order to develop a comprehensive college marketing plan, attitudes toward the Community College of Philadelphia had to be defined to understand whether the attitudes held are the ones that the College wants the community to hold.



Attendance At Community College Of Philadelphia. First, the residents were asked whether they had ever attended classes at the Community College of Philadelphia by responding “Strongly Agree,” “Agree,” “Neither Agree or Disagree,” “Disagree” or “Strongly Disagree” to the statement “I have attended classes at the Community College of Philadelphia.” As seen in Chart 6, overall 29 percent of the residents surveyed have attended classes at the Community College of Philadelphia. The residents of the West region were the most likely to have attended classes at the Community College of Philadelphia with 34 percent of the residents attending classes. Thirty percent of the residents of the Spring Garden region have attended classes at the Community College of Philadelphia, as have 29 percent of the residents of the Northeast region and 25 percent of the residents of the Northwest region.

The rationale for examining attitudes by whether or not the respondents have attended classes at the Community College of Philadelphia is that the more experience a person has with the College, the more a person should know about the College. In theory, the more a person knows about a College, the more favorable the attitude. In Chart 7, the attitudes toward the Community College of Philadelphia are cross-tabulated by whether or not the respondents have attended classes at the College.

Chart 7. Attitudes Toward Community College Of Philadelphia By Previous Student Status



Attitudes Toward Community College Of Philadelphia. Residents were asked to agree or disagree with a series of statements about Community College of Philadelphia using the scale of “Strongly Agree,” “Agree,” “Neither Agree or Disagree,” “Disagree,” or “Strongly Disagree.” The “Strongly Agree” and “Agree” responses were totaled and the percentage of the respondents agreeing with each statement is presented in Chart 7.

More than three-fourths of the residents surveyed in the City, regardless of whether they have attended the College or not, agreed “for recent high school graduates, the Community College of Philadelphia is a good choice for the first two years of a four-year college degree” and “at the Community College of Philadelphia, they teach the kinds of skills needed to get a job in my community.” Three-fourths of the residents also agreed that the “Community College of Philadelphia keeps its courses and classes up-to-date”; and “the student population is ethnically diverse.” The past students were slightly more likely to agree to these statements than those who have not attended the college.

The residents were asked about supporting the College and the good news for Community College of Philadelphia is that residents are willing to support the College. More than three-fourths of the residents, whether they have attended classes or not, agreed that “I believe that the Community College of Philadelphia is providing such a service in the community that if they asked me for support, I would agree.” Slightly more than 70 percent of the residents agreed that “if I go to the Community College of Philadelphia for two years, the majority of my credits will transfer to a four-year college” and there was little difference between the residents who had attended classes and those who had not in their agreement.

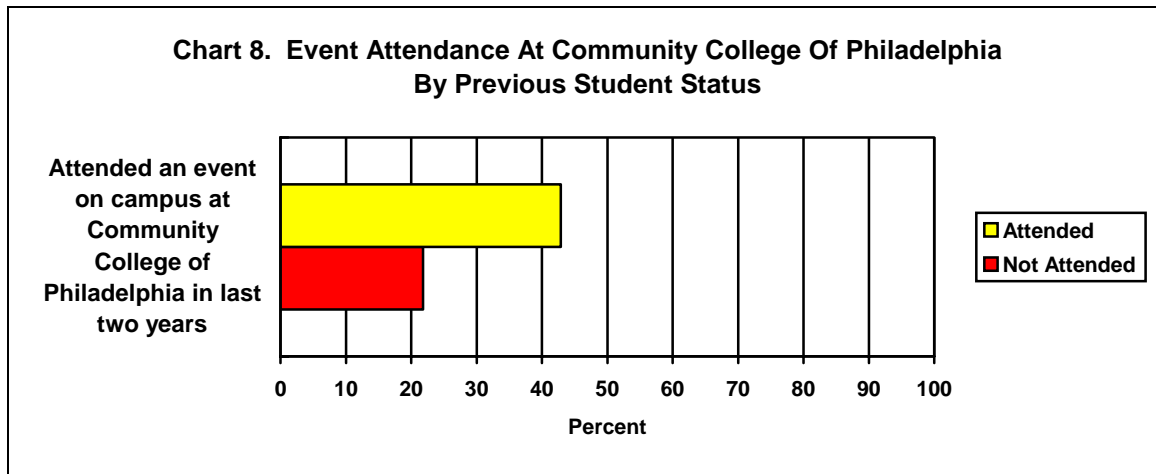
While 82 percent of the residents who have attended classes at the Community College of Philadelphia agreed that “the faculty teaching at the Community College of Philadelphia have advanced degrees and are current in their fields,” only 67 percent of the residents surveyed who have not attended classes agreed. The students who have attended classes at the College are more likely to agree (86 percent) that “the Community College of Philadelphia personnel are friendly and meet individual students’ needs,” compared to only 59 percent of the residents who have not attended classes. The students who have attended classes at the Community College of Philadelphia are more likely to agree that “there is a neighborhood site of the Community College of Philadelphia located conveniently close to my home” (91 percent) while 70 percent of those who have not attended classes agreed. While 74 percent of the residents who have attended classes note “I am very familiar with the programs and services offered by the Community College of Philadelphia,” only 41 percent of the residents who have not attended classes agreed.

Eighty percent of the residents in the City who have attended classes at the Community College of Philadelphia agree “Community College of Philadelphia has kept up with the latest technology and is on the cutting edge of course delivery” while 62 percent of the residents who have not attended classes agreed as well. Past students are more likely to agree (73 percent) that “I would attend the Community College of Philadelphia if it offered accelerated programs and courses” than the residents who have not attended (53 percent).

More than one-third of the residents, 44 percent of those who have attended classes and 38 percent of those who have not, agree “Community College of Philadelphia is primarily a college for those students who cannot get into a four-year college or university.” Thirty-five percent of the residents who have attended the Community College of Philadelphia and 25 percent of those who have not agree that “the majority of the students at the Community College of Philadelphia are enrolled in developmental courses or those below college level work.” The residents who have not attended courses at the Community College of Philadelphia (14 percent) are more likely to agree “I would not attend the Spring Garden Campus (City Center) of Community College of Philadelphia because City Center is not safe” than the students who have attended classes (seven percent).

Comparing the results of the 2000 Community Scan to the 2005 Community Scan, there has been a slight shift in attitudes in the service area for a few of the statements listed in Chart 7. The following statements have seen a significant shift in agreement from the 2000 to 2005 Community Scan:

- In 2000, only 31 percent of the residents in the City agreed that the “Community College of Philadelphia is primarily a college for those students who cannot get into a four-year college or university.” By 2005, 40 percent agreed with the statement.
- An increase in agreement with “the majority of the students at the Community College of Philadelphia are enrolled in developmental courses or those below college level work” was also seen among the residents from 2000 to 2005 – in 2000 only 21 percent agreed with the statement, but by 2005 28 percent agreed.
- However, residents in the City even more firmly believe by 2005 that the Community College of Philadelphia is a good place for students to start. In 2000, 78 percent agreed that “for recent high school graduates, the Community College of Philadelphia is a good choice for the first two years of a four-year degree” and by 2005, 85 percent agreed. There was also a 10 percent increase (67 percent from 77 percent) in agreement with “if I go to the Community College of Philadelphia for two years, the majority of my credits will transfer to a four-year college.”
- By 2005 more people in the City also believe that the “Community College of Philadelphia has kept up with the latest technology and is on the cutting edge of course delivery.” In 2000, 58 percent agreed with the statement and by 2005, 67 percent agreed.



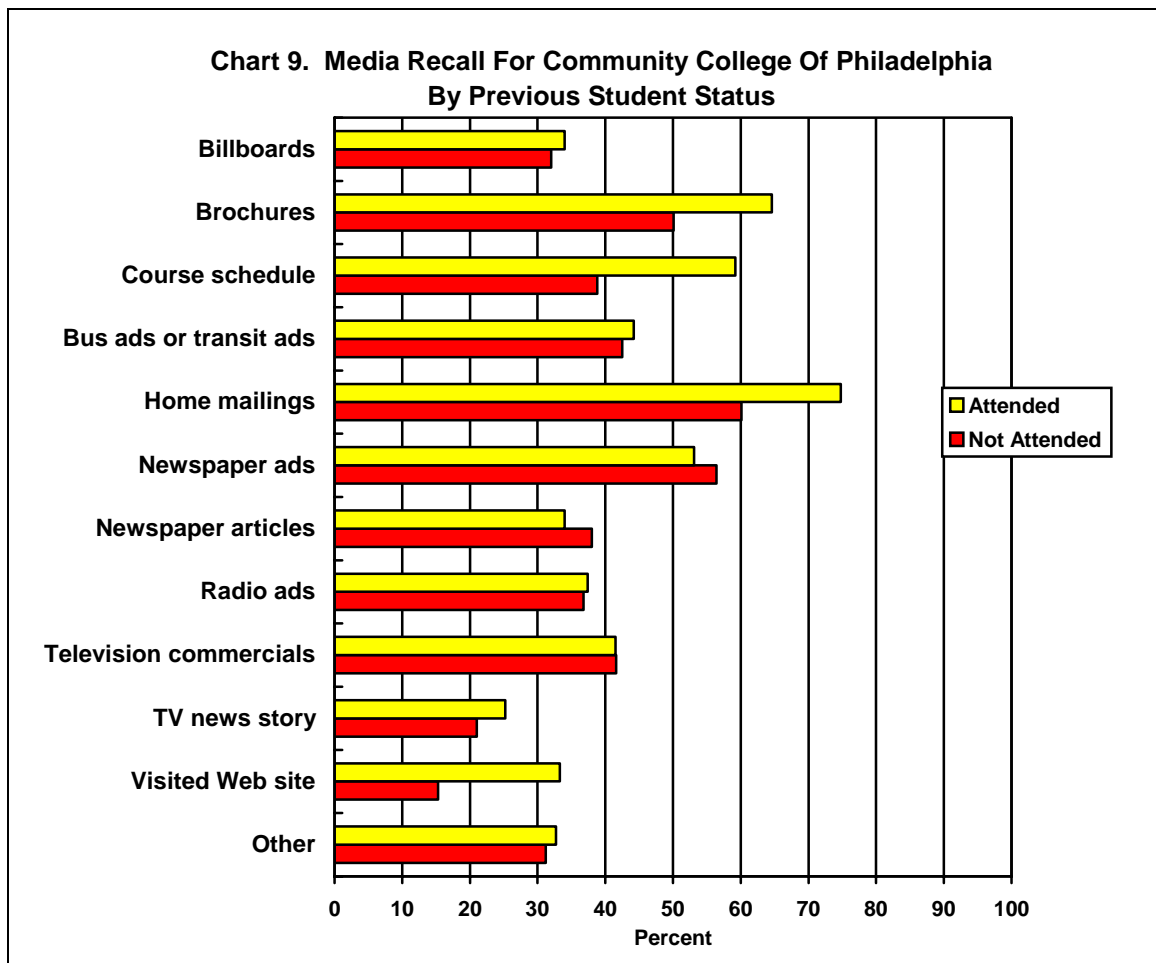
Event Attendance. Overall, 28 percent of the respondents living in the City have attended an event at Community College of Philadelphia in the last two years, as seen in Chart 8. As expected, 43 percent of the residents in the City who have attended classes have attended an event at the College in the last two years, compared to only 22 percent of the residents who have not attended classes. The residents who attended an event in the last two years at Community College of Philadelphia were most likely to have attended a graduation, an open house, a lecture, a job fair, art shows or attended classes.

The events mentioned were as varied as the individual respondents. Other events that the residents reported attending at the College included hurricane relief program, afternoon seminars, award ceremony, basic information seminar, basketball game and college fair, behavioral program/ health and human services, Black Student Association event, career event, children’s dance recitals, college fair, college workshop/ financial aid workshop/ counseling workshop, computer science, conference, counseling meeting, day care training, delivered trophies/ don't know what event it was, diploma, drill team application for drum corps, driver's education course, educational event for my granddaughter, English as a second language, fundraiser, GED program, genealogy society meeting, getting information, high school fair, history course, I pass there every day from work, walk through there a lot, there on business, Martin Luther King event, Indian sand art, job placement seminar, language arts, looking around, looking at schedules and saw a dance program, Martin Luther King day, mom teaches there and I go there a lot, my daughter's enrollment, my daughter graduated

from there, nonprofit management course, nurse in-service, orientation for nursing program, Pennsylvania held dance contest, prep course for teacher certification, seminar for job, sporting event, student day, taken kids to check it out, to get information on class for my daughter/ I called five times, training class, Trio funded program, Upward Bound program, walk by the campus on my way to St. Patty's parade, went there to take a test, and workshop for immigration.

Information Recall

It is very important for a community college to continue to be visible to the residents of a community, especially in the adult market. Residents in the service area were asked whether they had seen or heard information about Community College of Philadelphia over the last year. The more residents who recall the information being distributed by Community College of Philadelphia, the greater the awareness. In addition, the more interaction a person has with the College, the greater the awareness, so the results are reported by whether or not the respondent had attended classes at the Community College of Philadelphia. This is also an excellent indicator of the effectiveness of the marketing efforts by the College with those who have attended and those who have not. The results of the awareness test for media are presented in Chart 9.



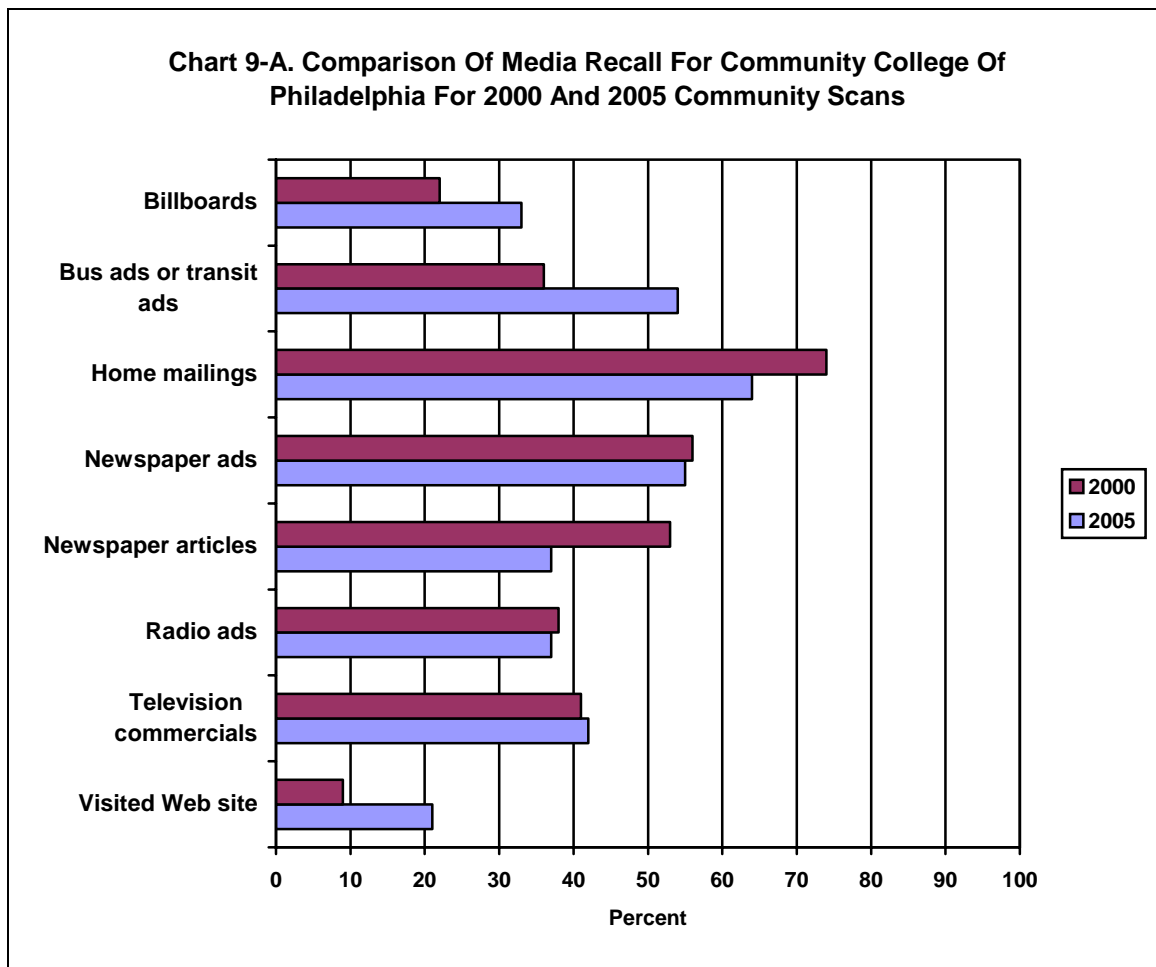
Media Recall. Chart 9 presents the media recall for the service area of Community College of Philadelphia. As expected, those respondents who have attended classes at the College have a higher recall of the media used in the market than the residents who have not attended any classes at the College, as seen in Chart 9. For those respondents who have attended classes at the College, the highest recall of media includes home mailings (75 percent), brochures (65 percent), the course schedule (59 percent) and newspaper ads (53 percent). Forty-four percent of the residents who have attended classes recalled the bus ads or transit ads and 41 percent recalled

the television commercials. Less than 40 percent of the previous students recalled radio ads (37 percent), billboards (34 percent), newspaper articles (34 percent), have visited the Web site (33 percent) and TV news stories.

The residents in the service area who have not attended classes at the Community College of Philadelphia were most likely to recall home mailings (60 percent), newspaper ads (56 percent) and brochures (50 percent). Forty-two percent of the residents who have not attended classes recalled bus ads or transit ads and 42 percent recalled television commercials. Only 39 percent of the residents who have not attended recalled the College's course schedule – apparently the residents who have attended classes are much more likely to remember and attend to the course schedule. Less than 40 percent of the residents who have not attended classes also recalled newspaper articles (38 percent), radio ads (36 percent), billboards (32 percent), TV news story (21 percent) and have visited the Web site (15 percent).

The major differences in media recalled between the residents who have attended classes at the College and those who have not was in the recall of the course schedule and those who have visited the Web Site. Only 39 percent of the residents who have not attended classes recalled the course schedule compared to 59 percent of those who have attended classes. The same pattern was seen for visiting the Web site as well – while 33 percent of those who have attended classes have visited the Web site, only 15 percent of those who have not attended classes have visited the College's site.

Other sources of information were noted as the key media recalled by 33 percent of the residents who have attended classes at the College and 31 percent of those who have not. The two key other sources noted by the respondents included word of mouth (more than one-fourth) and people (friends, family and students). Other ways information was recalled about the College in the last year included advertising street flag, at work, by phone, call for a catalog, catalog, classes on Internet, college fair, community activity booth, counselor, course catalog, directories that evaluate colleges, drove past it, e-mail, first hand experience, flags on poles, heard the name is all, I've gone by the college and noticed they have lots of students, I drive past it a lot, I know it's there, I know of some of the professors, in the schools, Internet, job, job fair, library, live near the campus, magazines, open house, Philadelphia college magazine/ phone book, Port Richmond and other newspapers, presentation, recommendations, reputation of the college, senior citizen center, showing of banners, visited the campus, walk-in and Web site.

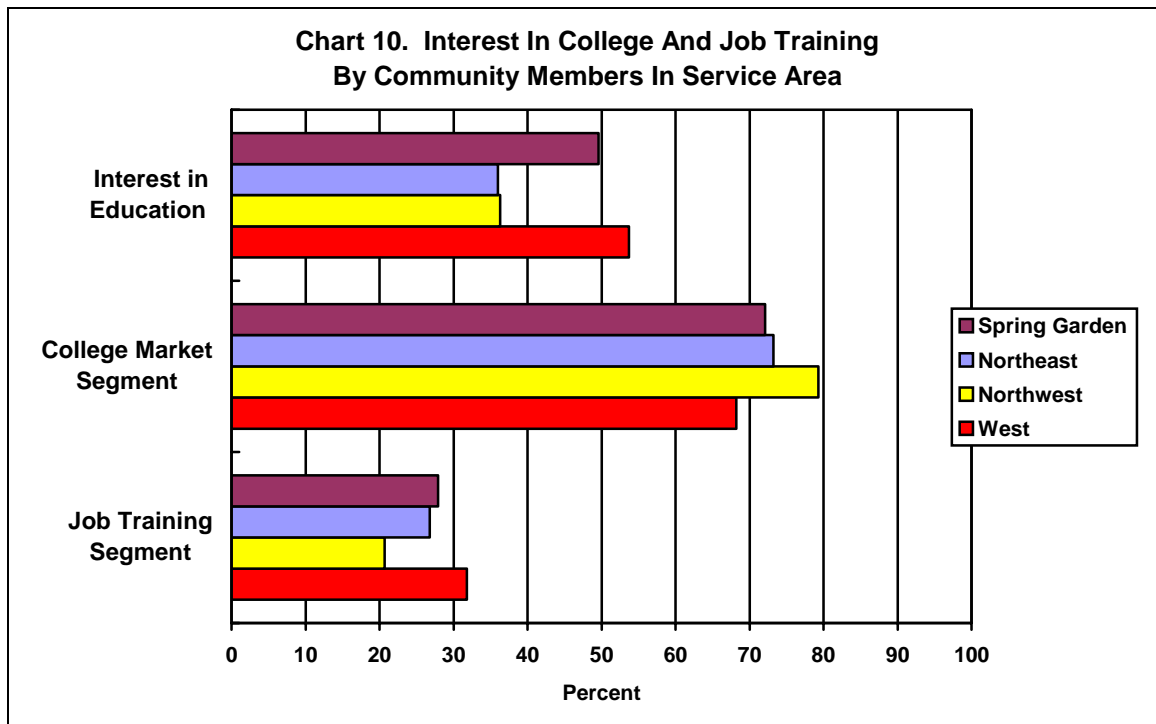


An increase has occurred in the overall media recall of billboards, bus ads or transit ads and visiting the Web site when comparing the results of the media recall from the 2000 Community Scan and the 2005 Community Scan. As seen in Chart 9-A, recall of billboards has jumped from 22 percent in 2000 to 33 percent in 2005 among the residents of the City. Recall of bus ads has also increased from 36 percent in 2000 to 43 percent in 2005. The percentage of the residents who have visited the Web site in the last year has also increased from nine percent in 2000 to 21 percent in 2005.

There have been slight drops in recall of home mailings and newspaper articles during the five years between the Community Scans. Recall of home mailings has dropped from 74 percent to 64 percent and recall of newspaper articles has dropped among the residents from 53 percent to 37 percent. Recall of the other media used by the College remains fairly constant.

Potential Market Segments

To define the potential market segments for Community College of Philadelphia, respondents were asked “In the next couple of years, do you expect to have any interest in taking a college credit course or enrolling in a degree program, or do you have any interest in obtaining job training, classes to improve job skills or training for a new job?”



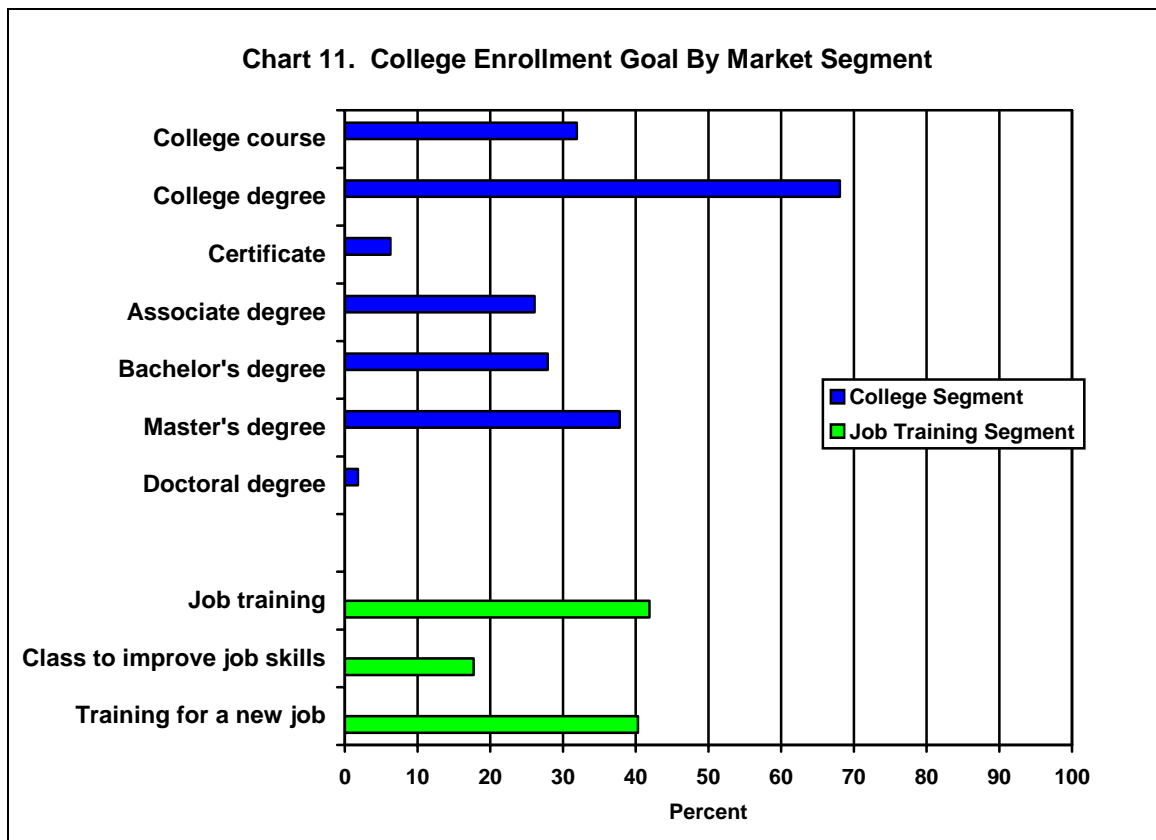
Interest In Education And Training. Overall, 45 percent of the residents in the service area have an interest in education or job training in the next couple of years, as seen in Chart 10. Fifty-four percent of the residents in the West region, half in the Spring Garden region, and 36 in the Northeast and Northwest regions, have an interest in education in the next couple of years, as seen in Chart 10. When asked specifically whether they were interested in taking a college credit course or enrolling in a degree program (college market segment) or any interest in obtaining job training, classes to improve job skills or training for a new job (job training), residents were twice as likely to be interested in attending college.

Residents in the City are more interested in obtaining education today than five years ago. In the 2000 Community Scan, only 33 percent of the residents in the City were interested in education or job training and by 2005, 45 percent of the residents were reporting an interest. There have been increases in all of the regions comprising the service area of the Community College of Philadelphia. In 2000, 30 percent of the residents in the Spring Garden region were interested in education and training compared to 50 percent today. While 22 percent of the residents in the Northeast region were interested in education in 2000, by 2005 36 percent were interested. A slightest increase in interest is seen in the Northwest region where 31 percent were interested in education in 2000 and by 2005 36 percent were interested. In the West region, the interest in education rose from 30 percent to 54 percent by 2005.

Of those residents in the service area who reported an interest in education or job training, 72 percent of the residents of the Spring Garden region, 73 percent in the Northeast region, 79 percent in the Northwest region and 68 percent in the West region are interested in either attending college classes or obtaining a college degree and these residents constitute the college market segment (see Chart 10). Overall, 28 percent of the

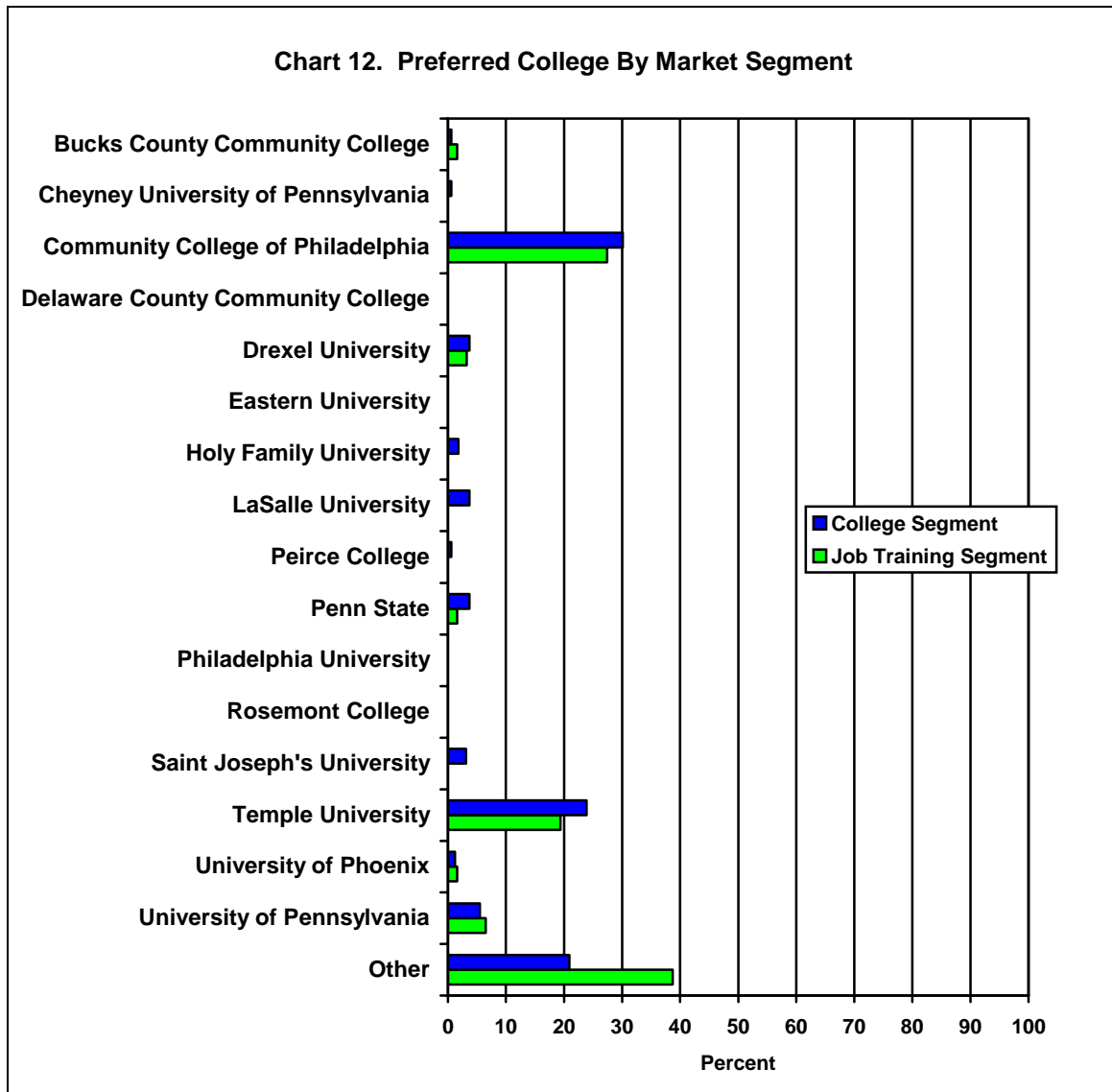
residents in the service area are interested in obtaining job training, taking classes to improve job skills or training for a new job. The residents in the West region are the most interested in job training (32 percent), compared to 28 percent of those in the Spring Garden region, 27 percent of those in the Northeast region and 21 percent in the Northwest region. The residents interested in obtaining job training, taking classes to improve job skills or training for a new job comprise the job training segment. Both of these segments will be profiled with respect to their interest in college and job training. In the remaining sections of the report, the characteristics of each of the segments will be examined.

For the residents who are not interested in attending college or job training, they were asked if there was anything which would change their minds about attending in the future. For the majority, nothing would change their mind – they noted they are too old (46 to more than 80 years of age), they already have a degree or a higher degree, they are nearing retirement in their career, always hated school or are too lazy.



Enrollment Goal. The college market segment is most interested in obtaining a college degree, as seen in Chart 11. The enrollment goal for 68 percent of the college market segment is to obtain a college degree. A master’s degree is the degree goal for 38 percent of those interested in obtaining a college degree, while 28 percent are interested in obtaining a bachelor’s degree, 26 percent an associate degree, six percent a certificate and two percent are interested in completing a doctorate. Only 32 percent of the college market segment are just interested in taking a college course.

The residents who comprise the job training market segment are as interested in job training (42 percent) as they are in training for a new job (40 percent) as seen in Chart 11. Only 18 percent of the job training market segment is interested in taking classes to improve current job skills.

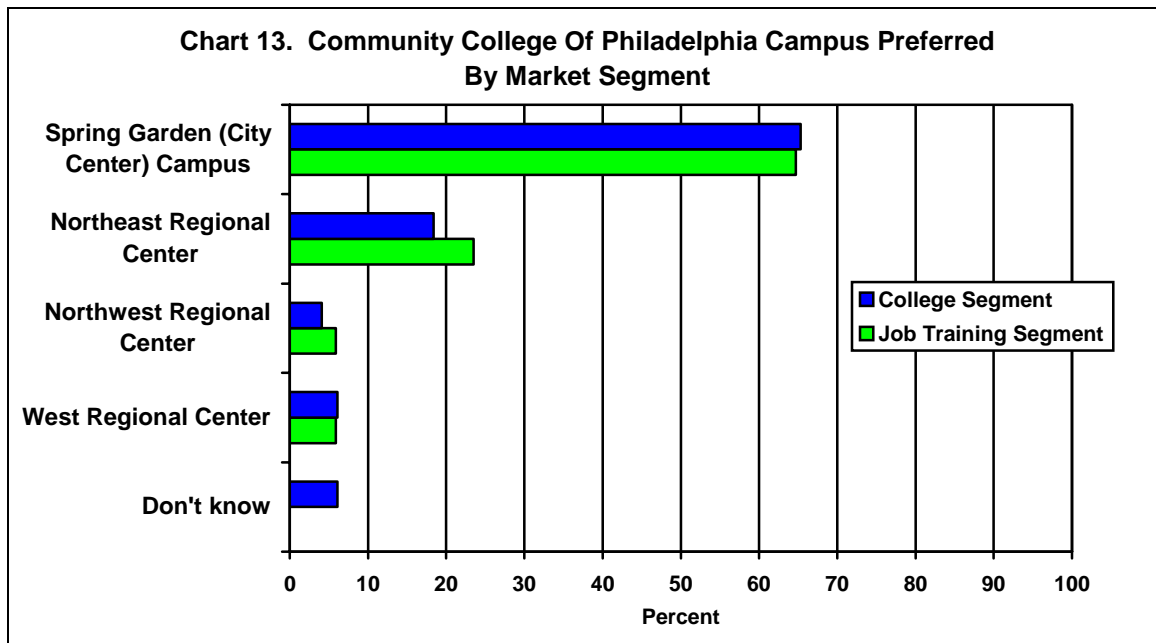


College Preference. The residents in the college market segment are most likely to attend the Community College of Philadelphia and Temple University, as seen in Chart 12. Thirty percent of the college market segment would enroll at the Community College of Philadelphia, 24 percent would enroll at Temple University and 21 percent would enroll in other colleges. Only six percent would enroll at the University of Pennsylvania, four percent would attend Drexel University, LaSalle University and Penn State, respectively, and three percent Saint Joseph’s University. The college market segment who will not attend the Community College of Philadelphia noted that the College does not offer the program needed (typically above an associate degree), already have an associate degree, not convenient for me and tried there already.

The other colleges mentioned as preferred for enrollment by the college market segment include Arcadia University, Ashworth College, Brennan Institute, Business School, Camden County College, Carnegie Mellon University, Duke or University of North Carolina, Gratz College, Immaculata University, Jefferson Nursing School/ Philadelphia, Liberty University/ Lynchburg, Virginia, Manor College, Montgomery County Community College, Moore College of Art, Newman University, online, Orleans Technical Institute, out of the City, St. Charles Seminary, Stratford University, University of Miami, University of Phoenix, University of the Arts, Walden University online, West Chester University and Widener University.

The job training segment is most likely to enroll at one of the other colleges mentioned by the residents interested in job training. While 27 percent of the job training segment would enroll at the Community College of Philadelphia and 19 percent would enroll at Temple University, 39 percent mentioned another college for enrollment. Six percent of the job training segment would enroll at the University of Pennsylvania, three percent at Drexel University and only two percent at Bucks County Community College, Penn State, and the University of Phoenix, respectively. The residents in the job training market segment who would not consider enrolling at the Community College of Philadelphia noted that it is not convenient for them, trade schools are better, already went there and does not have the programming wanted.

The other colleges mentioned as the college most likely to enroll by the job training segment included Arcadia University, at home professional/ a company out of Colorado, Breane Institute of Hair Design, Brown University, Cittone, good trade school, Lincoln Technical Institute, Lincoln University, Philadelphia College of Osteopathic Medicine, restaurant school on Walnut Street, technical college in New York, Thomas Jefferson University and trade school.



Those residents in the college market segment who would be most likely to enroll at the Community College of Philadelphia would primarily attend the Spring Garden Campus (65 percent) rather than the Northeast Regional Center (18 percent), the Northwest Regional Center (four percent) or the West Regional Center (six percent), as seen in Chart 13. Sixty-five percent of the job training segment who will enroll at the Community College of Philadelphia would attend the Spring Garden Campus, while 24 percent would attend the Northeast Regional Center and only six percent would attend the Northwest Regional Center or the West Regional Center.

Programs Of Interest. Although there are various program interests for each market segment, both of the segments have a major interest in the following programs: nursing, programs in the medical field, computers, business and education.

The major program areas of interest for the college market segment are accounting, administration, antiques, art and English, art history, behavior health courses, biomedical, business administration, business administration/ management, business education, business management, business/ MBA, career teaching, chemistry, child care, child day care, childhood education, clinical psychology, computer science, computer technology/ business management, computers, continuing education/ secondary education, counseling program, criminal behavior of children/ psychology, criminal justice, dental, development/ teaching, doctorate

of education, early childhood education, economics, education administration, educational technology, elementary education, engineering, English, film production, finance and information, fine arts, foreign language, funeral services, GED/ nursing, general student, hair dressing school and business management, health, history, hospitality, human services, illustration program, information systems, information tech/ computers, information technology, juvenile justice, languages, law, law enforcement, liberal arts, linguistic/ transportation or communication, literature, management in business, management/ editing, marketing, marketing/ communications, Master's in business administration, Master's in construction management, Master's in special education, Master of science in nursing, MBA/ communication, medical billing, medical/ nursing, medical/ registered nurse, money management class, music major, nursing administration, nursing/ registered nurse, paralegal, paralegal law school, pharmacy, physical education, political science, public administrator, real estate/ child care, RN/ nursing, science, sign language, social science, social services/ social work, sociology, something in informatics, Spanish, special education or higher learning, statistics or operations research, teaching, theology, urban education and urology.

The job training market segment is most interested in the technical training areas. The program areas that are of most interest to the job training segment include advances in food training field, auto mechanic class, automotive tech, business, business/ real estate, carpentry, CNA/ nurse assistant, computer technology, computers of billing tech, construction business, construction management, cooking, cosmetology, counselor/ psychology, culinary school, dental hygienist program, education, electrical technician, electronics, fashion/ computers/ business, GED, general theology/ human resources, graphic design, health care classes, heat/ refrigeration, improve teaching skills, math, MBA or law, medical, medical billing and filing, medical field, medical/ Medicaid/ transcription by computer, medicine, nursing, pharmacy technician, psychology, real estate, some type of a trade, something in teaching, veterinarian or technician and x-ray/ ultrasound.

Computer Usage For Market Segments

Access to computers will have a major impact on the ability of the market segments to access information and take the online courses offered by the College. It is important to know and understand the availability of computers in the service area of the Community College of Philadelphia and to better understand how the segments are using computers. The computer usage characteristics for the service area of Community College of Philadelphia and the characteristics for the market segments are presented in Chart 14.

Chart 14. Computer Characteristics By Market Segment And Community Members In Service Area
(Percent Responding Yes)

	College Segment	Job Training Segment	Spring Garden	Northeast	Northwest	West
Computer at home						
2005	87.1	66.1	65.6	80.7	76.3	68.3
2000	NA	NA	55.8	69.7	61.0	52.5
Access to an online service, the Internet or the World Wide Web from your home						
2005	81.0	58.1	62.9	77.2	68.8	58.5
2000	NA	NA	64.4	75.9	95.7	73.8
Internet Connection						
Dial-up	35.6	33.3	27.0	34.1	38.2	37.5
Cable modem	9.8	27.8	12.8	26.1	9.1	14.6
High-speed DSL	50.0	30.6	51.1	34.1	34.5	37.5
Don't know	3.8	8.3	8.5	3.4	14.5	10.4
Major Internet Provider						
AOL	35.6	38.9	28.4	36.4	43.6	37.5
Comcast	9.8	13.9	14.9	26.1	9.1	2.1
Earthlink	3.8	0.0	3.5	1.1	3.6	2.1
MSN	3.8	8.3	4.3	2.3	5.5	2.1
Verizon	30.3	19.4	31.2	14.8	14.5	22.9
Most Frequent Online Activities						
Send e-mail	80.3	83.3	80.9	72.7	89.1	77.1
Participate in online chats	15.9	16.7	11.3	13.6	20.0	16.7
Read newspapers/ magazines	60.6	75.0	65.2	56.8	65.5	62.5
Research products to purchase	77.3	86.1	84.4	85.2	72.7	77.1
Shop/ make purchases	66.7	66.7	68.8	71.6	50.9	58.3
View stock quotes/ commodity prices	18.9	22.2	24.8	19.3	18.2	14.6
Banking	47.0	58.3	54.6	48.9	50.9	50.0
Play online games	37.9	55.6	33.3	43.2	49.1	37.5
Look for medical or health information	74.2	80.6	75.9	77.3	72.7	62.5
Download music files and/ or software	44.7	47.2	45.4	31.8	36.4	35.4
Make travel arrangements	71.2	69.4	71.6	63.6	65.5	64.6
Take college classes	15.2	0.0	8.5	8.0	7.3	6.3
Check weather conditions	62.9	77.8	68.8	65.9	67.3	58.3
Reading blogs	15.9	25.0	20.6	17.0	10.9	18.8

In the City, the overall penetration of households with computers is 71 percent, but there are variations by region of the City, as seen in Chart 14. While only 66 percent of the residents in the Spring Garden region have a computer in their home, 68 percent of the residents in the West region and 76 percent of the residents in the Northwest region have computers, as do 81 percent of the residents of the Northeast region (see Chart 14). However, the college market segment and the job training segments are wired – 87 percent of the college

segment and 66 percent of the job training segment have computers in their home. Almost two-thirds of the residents in the City have access to the Internet from their home, as seen in Chart 14. Internet penetration in the home is more evenly dispersed across the regions – while only 59 percent of the residents in the West region have access to the Internet from their home, 63 percent of the residents in the Spring Garden region, 69 percent of the residents in the Northwest region and 77 percent on the Northeast region have Internet access. The college segment has the best Internet access with 81 percent of the college segment having Internet access from home. Only 58 percent of the job training segment has Internet access from home.

Comparing the 2005 Community Scan results with the 2000 Community Scan results, a significant increase in the percent of homes with computers is seen in Chart 14. However, the increase in computers did not automatically lead to an increase in Internet access from home. In the West and Northwest regions, one finds that the percentage of computers increased from 2000 to 2005, but there was a decline in the percent of computers with Internet access.

For those households with computer access, the households vary greatly by segment in their connection type. Forty-two percent of the households in the City have high-speed DSL and 16 percent have a cable modem – only 32 percent of the residents in the City reported dial-up. However, differences did exist across the regions. The residents with Internet in the Spring Garden region are the most likely to have high-speed DSL (51 percent) compared to slightly more than one-third of the residents in the other districts. The residents in the Northeast region are twice as likely to have a cable modem than the residents in the other regions. Slightly more than one-third of the residents of the Northeast, Northwest and West regions are likely to have dial-up access, but only 27 percent of the residents in the Spring Garden region have dial-up access.

More than one-third of the college segment (36 percent) and the job training segment (33 percent) still have dial-up modems. The college segment is the most likely to have a high-speed DSL in their home (50 percent) compared to the job training segment (31 percent). Overall, only 10 percent of the college segment and 28 percent of the job training segment has a cable modem. AOL, Verizon, Comcast, MSN and Earthlink appear to be the major Internet providers in the market.

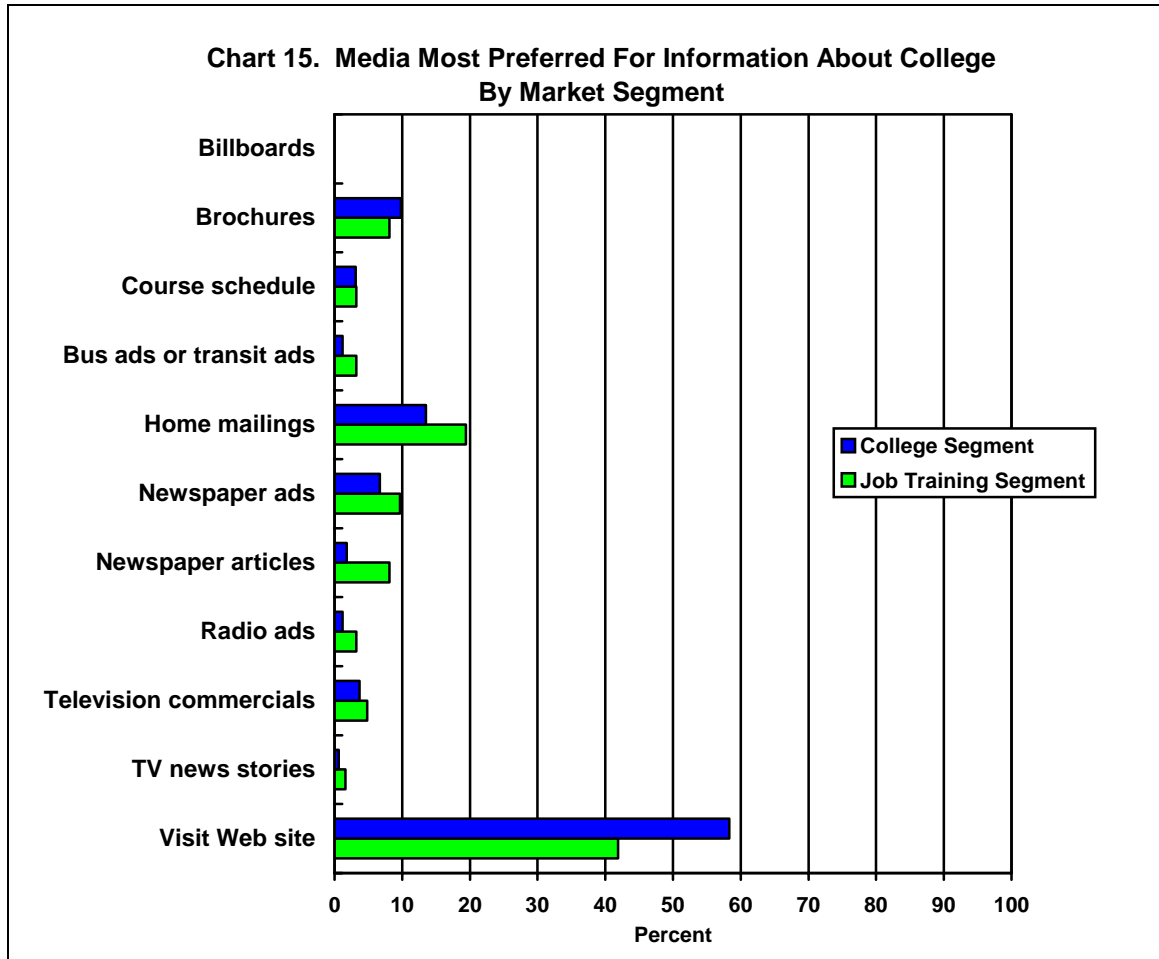
The most frequent online activities of the college market segment is sending e-mails (80 percent), researching products to purchase (77 percent), looking for medical or health information (74 percent), making travel arrangements (71 percent), shopping/ making purchases (67 percent), checking weather conditions (63 percent) and reading newspaper and magazines (61 percent). The college segment is least likely to participate in online chats, take college classes and reading blogs (15 percent). The most frequent online activities of the job training segment include researching products to purchase (86 percent), sending e-mails (83 percent), looking for medical/ health information (81 percent), checking weather conditions (78 percent), reading newspapers/ magazines (75 percent), making travel arrangements (69 percent) and shopping/ making purchases (67 percent). The job training segment is least likely to take online classes, participate in online chats and view stock quotes/ commodity prices.

The major difference noted in online activities between the residents in the City include the following:

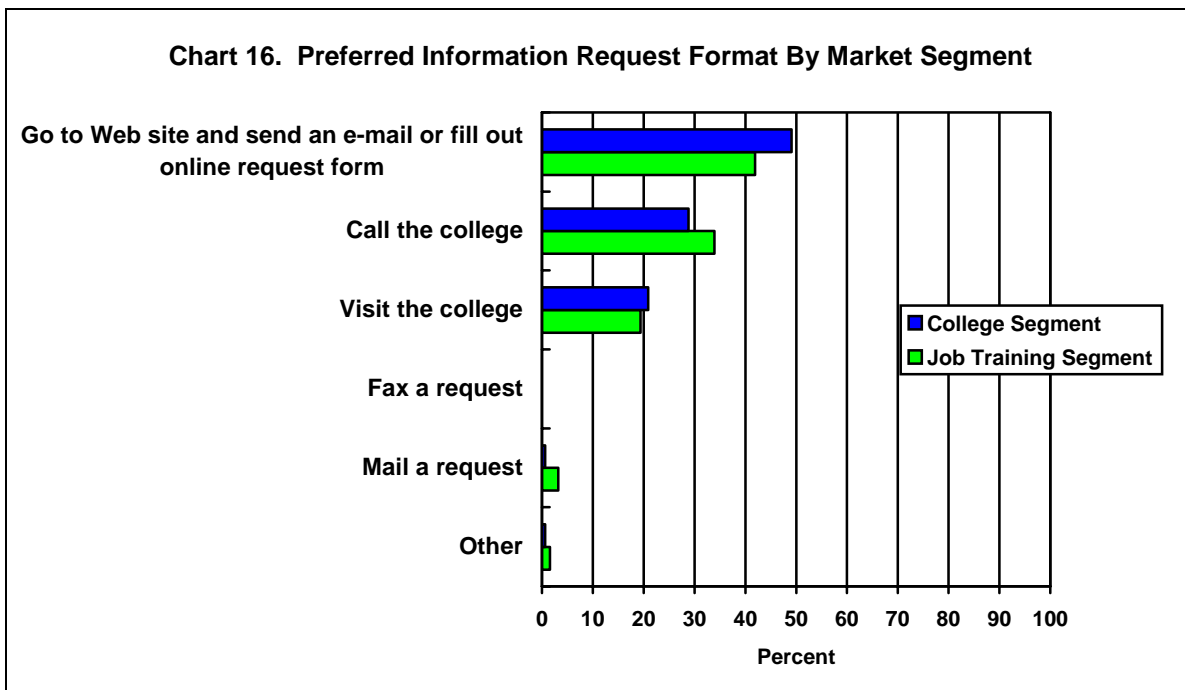
- Residents in the Northwest region are more likely to participate in online chats
- Residents in the Northwest and West regions are less likely to shop/ make purchases online than the residents in the Spring Garden and Northeast regions
- Residents in the Spring Garden region are more likely to view stock quotes/ commodity prices online and download music files/ software, and read blogs
- Residents in the Northeast and Northwest regions are more likely to play online games

Media Usage By Market Segment

Finally, the question is, how do we reach the potential market segments? Are there significant differences in the media habits of the market segments? The media preferences are presented in Chart 15 for the defined market segments.



Media Preferred. Residents in the market segments were asked to indicate which media they would be most likely to use when they were choosing a college to attend and the results are seen in Chart 15. In the college market segment, 58 percent of the market segment prefer to use the Internet as a source of information about a college to attend, 14 percent prefer getting information from home mailings and 10 percent from brochures. The job training segment is also most likely to rely on the Internet for information about a college (42 percent), but 19 percent would also use home mailings as a preferred source of information and 10 percent prefer to use newspaper ads for information. Less than 10 percent of the market segments would use billboards, the course schedule, newspaper articles, radio ads, television commercials and TV news stories to gain information about a college.



Information Requests. The market segments in the service area of the Community College of Philadelphia who were interested in enrolling in college were asked how they would be most likely to request information from a college and the results are presented in Chart 16. Overall, almost half of the market segments are likely to go to the Web site and send an e-mail or fill out an online request form. Forty-nine percent of the college market segment and 42 percent of the job training segment would go online and request information. Twenty-nine percent of the potential enrollees in the college market segment would call the college to gain information and 21 percent would visit the college for information. Of the potential enrollees in the job training segment, 34 percent would call the college for information and 19 percent would visit the college for information. Almost none of the potential enrollees in the market segments would mail a request for information and none would fax a request for information.

Two percent of the job training segment and less than one percent of the college market segment would request information about a college in another way, specifically: advertisement, ask a high school counselor, call 411 for information, check newspaper, contact friends who go there, directory, from family, receive information and schedules in the mail, look over syllabus, newspaper ad, open houses, phone, put in resume, through advertisements, word of mouth and Yellow Book.

Market Segment Characteristics

The market segments are demographically described in the following section. Significant differences in the demographic characteristics of the segments will be noted when applicable to assist the Community College of Philadelphia in more accurately pinpointing the markets for communications. The market segments will be described with respect to media usage, education, employment and demographic characteristics.

Chart 17. Media Characteristics By Market Segment And Community Members In Service Area
(Percent Responding)

	College Segment	Job Training Segment	Spring Garden	Northeast	Northwest	West
Favorite Radio Stations	Power 99 103.9 WHYY 100.3	107.9 WDAS	Power 99 WHYY 103.9	KYW B101 610	103.9 107.9 KYW Power 99	103.9 Power 99 KYW 105.3 107.9 WHYY
Do not listen	8.0	5.0	9.0	1.8	2.6	4.9
Favorite Television (Cable) Stations	ABC CH 6 CH 10 Lifetime HBO NBC UPN	CH 10 NBC UPN HBO Lifetime CBS	ABC CH 6 Lifetime NBC	CH 6 HBO ABC ESPN	CH 6 ABC CBS CH 3 CNN NBC	CH 6 ABC Lifetime CBS CH 10
Do not watch	7.4	6.7	6.8	4.4	2.5	5.1

Media Characteristics. The favorite radio stations did not differ greatly between the market segments, as seen in Chart 17. Radio stations Power 99 and 103.9 appear to be favorites across all the majority of the market segments, but the percentage of the respondents who are not listening to the radio is growing with the growth of personal listening devices (MP3 players). In addition, it should be noted that the majority of the radio stations had less than a ten percent listenership overall in any of the market segments.

The television viewership is as diverse as the radio listenership in the Philadelphia market. The major channels that are viewed by the market segments include ABC, Channel 6 and Lifetime. However, none of the television stations or cable channels listed as a favorite held a ten percent market share in the television viewership. The detailed results provide a glimpse of the variety of the television stations watched and the cable stations which can be targeted for specific programming with the market segments.

Chart 18. Educational Characteristics By Market Segment And Community Members In Service Area
(Percent Responding)

	College Segment	Job Training Segment	Spring Garden	Northeast	Northwest	West
Highest Level Of Education Completed						
Less than high school	1.8	11.3	7.1	2.6	8.8	2.4
High school	20.2	35.5	31.3	29.8	21.3	29.3
High school plus some college	26.4	16.1	18.3	19.3	25.0	25.6
Technical/ Vocational/ Career certificate	2.5	8.1	3.1	6.1	7.5	3.7
Associate degree	9.8	4.8	6.3	7.9	8.8	9.8
Bachelor's degree	22.7	12.9	16.5	19.3	15.0	12.2
Master's degree	13.5	9.7	11.6	11.4	7.5	14.6
Doctoral degree	1.8	1.6	0.9	1.8	3.8	2.4
Professional degree (medical, dental, law)	0.6	0.0	4.0	0.9	1.3	0.0

Educational Characteristics. The college market segment is the most likely to have completed a bachelor's degree when compared to the job training segment and the residents in the regions across the Philadelphia service area. The job training segment is the least likely to have completed a bachelor's degree but is the most likely to have completed only high school (35 percent) and to not have completed high school (11 percent), as seen in Chart 18.

The residents in the Northeast region are the most likely to have completed a bachelor's or master's degree compared to the others in the regions. The residents in the Spring Garden region are the least likely to have completed any education – seven percent have not completed high school and 31 percent have completed only high school. One-fourth of the residents in the Northwest and West regions have completed high school plus some college. The residents in the Northeast and the Northwest regions are the most likely to have completed certificates.

Chart 19. Employment Characteristics By Market Segment And Community Members In Service Area
(Percent Responding)

	College Segment	Job Training Segment	Spring Garden	Northeast	Northwest	West
Employment Status						
Full-time	58.3	53.2	50.4	54.4	37.5	56.1
Part-time	20.9	17.7	15.2	15.8	16.3	9.8
Not employed	20.2	29.0	33.5	29.8	45.0	34.1
Employer Tuition Assistance	46.5	36.4	40.1	42.5	37.2	59.3
Full reimbursement	43.3	26.7	46.6	29.4	40.0	34.4
Partial reimbursement	55.0	60.0	46.6	67.6	53.3	50.0

Employment Characteristics. The market segments that are interested in education and training are more likely to be employed than the overall population in the service area. More than 70 percent of the potential enrollees are employed as seen in Chart 19 – 79 percent of the college segment and 71 percent of the job training segment. Overall 65 percent of the residents in the City are employed with the lowest levels of employment seen in the Northwest region. Sixty-six percent of the residents in the Spring Garden region, 70 percent of the residents of the Northeast region and 66 percent of those in the West region are employed, compared to only 54 percent of the residents in the Northwest region. The Northwest region also has the highest level of unemployment in the City – 45 percent. The college segment is the most likely to be employed full-time, with 58 percent of the segment employed full-time. Fifty-three percent of the job training segment is employed full-time.

As seen in Chart 19, 46 percent of the college segment and only 36 percent of the job training segment that work have employer tuition assistance available. The residents that work in the West region are the most likely

to have tuition reimbursement available to them (59 percent), compared to 40 percent of those in the Spring Garden region, 42 percent in the Northeast region and 37 percent in the Northwest region. Of those with tuition reimbursement available, 43 percent of the college segment and 27 percent of the job training segment have full reimbursement available for use, as do 47 percent of the residents in the Spring Garden region, 40 percent in the Northwest region, 34 percent in the West region and only 29 percent in the Northeast region.

Chart 20. Demographic Characteristics By Market Segment And Community Members In Service Area
(Percent Responding Yes)

	College Segment	Job Training Segment	Spring Garden	Northeast	Northwest	West
Average Age Of Respondent	36.8	38.3	43.5	50.8	50.9	47.9
Neighborhood						
Center City	3.1	6.5	8.9	0.0	0.0	0.0
South Philadelphia	12.9	11.3	27.2	0.0	0.0	0.0
Southwest Philadelphia	8.6	9.7	1.8	0.0	0.0	37.8
West Philadelphia	10.4	12.9	0.0	0.0	0.0	62.2
Lower North Philadelphia	7.4	3.2	12.9	0.0	0.0	0.0
Upper North Philadelphia	7.4	11.3	9.8	0.0	21.3	0.0
Kensington, Richmond, Bridesburg	6.7	11.3	13.4	0.0	0.0	0.0
Roxborough, Manayunk	4.3	1.6	6.7	0.0	0.0	0.0
Germantown, Chestnut Hill	9.2	4.8	1.3	0.0	60.0	0.0
Oak Lane, Olney	5.5	8.1	8.9	0.0	18.8	0.0
Near Northeast	19.0	11.3	8.9	62.3	0.0	0.0
Far Northeast	5.5	8.1	0.0	37.7	0.0	0.0
Zip Code Of Residence						
19102	0.6	0.0	0.9	0.0	0.0	0.0
19103	1.2	3.2	4.0	0.0	0.0	0.0
19104	3.1	3.2	0.0	0.0	0.0	14.6
19106	0.6	0.0	2.2	0.0	0.0	0.0
19107	0.6	3.2	1.8	0.0	0.0	0.0
19111	3.1	1.6	0.0	17.5	0.0	0.0
19114	0.6	3.2	0.0	9.6	0.0	0.0
19115	1.8	1.6	0.0	9.6	0.0	0.0
19116	1.2	0.0	0.0	8.8	0.0	0.0
19118	1.2	0.0	1.3	0.0	0.0	0.0
19119	1.2	1.6	0.0	0.0	12.5	0.0
19120	3.7	6.5	8.9	0.0	0.0	0.0
19121	3.1	3.2	4.9	0.0	0.0	0.0
19122	1.2	0.0	2.2	0.0	0.0	0.0
19123	1.2	0.0	1.8	0.0	0.0	0.0
19124	6.1	1.6	8.9	0.0	0.0	0.0
19125	2.5	3.2	3.6	0.0	0.0	0.0
19126	0.0	1.6	0.0	0.0	6.3	0.0
19127	0.0	1.6	0.9	0.0	0.0	0.0
19128	4.3	0.0	5.8	0.0	0.0	0.0
19129	0.6	0.0	0.0	0.0	5.0	0.0
19130	1.8	0.0	4.0	0.0	0.0	0.0
19131	1.8	4.8	0.0	0.0	0.0	17.1
19132	1.8	3.2	6.3	0.0	0.0	0.0
19133	1.2	4.8	3.6	0.0	0.0	0.0
19134	3.7	8.1	8.5	0.0	0.0	0.0
19135	1.8	3.2	0.0	9.6	0.0	0.0
19136	1.8	1.6	0.0	10.5	0.0	0.0
19137	0.6	0.0	1.3	0.0	0.0	0.0
19138	1.2	0.0	0.0	0.0	13.8	0.0
19139	3.1	1.6	0.0	0.0	0.0	17.1

	College Segment	Job Training Segment	Spring Garden	Northeast	Northwest	West
19140	4.3	3.2	0.0	0.0	21.3	0.0
19141	1.8	0.0	0.0	0.0	12.5	0.0
19142	3.7	1.6	0.0	0.0	0.0	11.0
19143	4.3	8.1	0.0	0.0	0.0	26.8
19144	3.7	3.2	0.0	0.0	17.5	0.0
19145	1.8	1.6	7.1	0.0	0.0	0.0
19146	4.9	3.2	6.3	0.0	0.0	0.0
19147	1.8	3.2	6.3	0.0	0.0	0.0
19148	4.3	3.2	7.6	0.0	0.0	0.0
19149	3.7	3.2	0.0	14.9	0.0	0.0
19150	1.2	0.0	0.0	0.0	11.3	0.0
19151	2.5	3.2	0.0	0.0	0.0	13.4
19152	2.5	0.0	0.0	9.6	0.0	0.0
19153	0.6	0.0	1.8	0.0	0.0	0.0
19154	1.8	3.2	0.0	9.6	0.0	0.0
Marital Status Of Respondent						
Married	37.4	30.6	34.4	57.0	41.3	30.5
Never married	46.0	40.3	36.6	18.4	30.0	30.5
Separated/ Divorced	13.5	24.2	18.3	14.0	13.8	19.5
Widowed	2.5	3.2	9.8	10.5	13.8	17.1
Ethnic Background Of Respondent						
African-American/ Black	41.7	50.0	34.8	7.9	68.8	65.9
Caucasian/ White	39.3	33.9	47.8	78.1	16.3	18.3
Asian/ Pacific Islander	1.8	1.6	3.1	1.8	1.3	1.2
Spanish Surname/ Latino	4.9	4.8	4.0	1.8	3.8	2.4
American Indian	0.0	0.0	0.0	0.0	0.0	0.0
Multiracial	6.1	6.5	4.5	2.6	2.5	6.1
Other	1.8	0.0	2.2	5.3	3.8	0.0
No response/ Do not want to respond	4.3	3.2	2.7	2.6	2.5	4.9
Annual Family Income						
Less than \$25,000	22.1	27.4	25.9	11.4	27.5	26.8
Less than \$50,000	32.5	29.0	32.6	26.3	35.0	36.6
Less than \$75,000	19.6	19.4	14.3	33.3	22.5	17.1
Less than \$100,000	11.7	9.7	8.0	11.4	7.5	9.8
Less than \$150,000	4.3	4.8	6.3	6.1	0.0	3.7
More than \$150,000	1.2	1.6	4.0	0.0	2.5	0.0
Refused/ No response	8.6	8.1	8.9	11.4	5.1	6.1
Gender Of Respondent						
Male	25.8	33.9	35.3	35.1	22.5	30.5
Female	73.0	66.1	63.8	64.9	76.3	69.5

Demographic Characteristics. Significant differences in demographic characteristics were noted between the market segments and the residents on the basis of age (see Chart 20). Overall, the market segments interested in education and training are significantly younger than the residents in the service area. The average age of the potential enrollees in the college market segment is 37 and the job training segment is 38. The average age of the residents in the City is older than the segments – 44 in the Spring Garden region, 51 in the Northeast and Northwest regions and 48 in the West region.

The college market segment and the job training segment are more likely to be single than the residents in the City. Forty-six percent of the college market segment and 40 percent of the job training segment have never been married, but only 37 percent of those in the Spring Garden region, 18 percent in the Northeast region, 30 percent in the Northwest region and 30 percent in the West region have never been married.

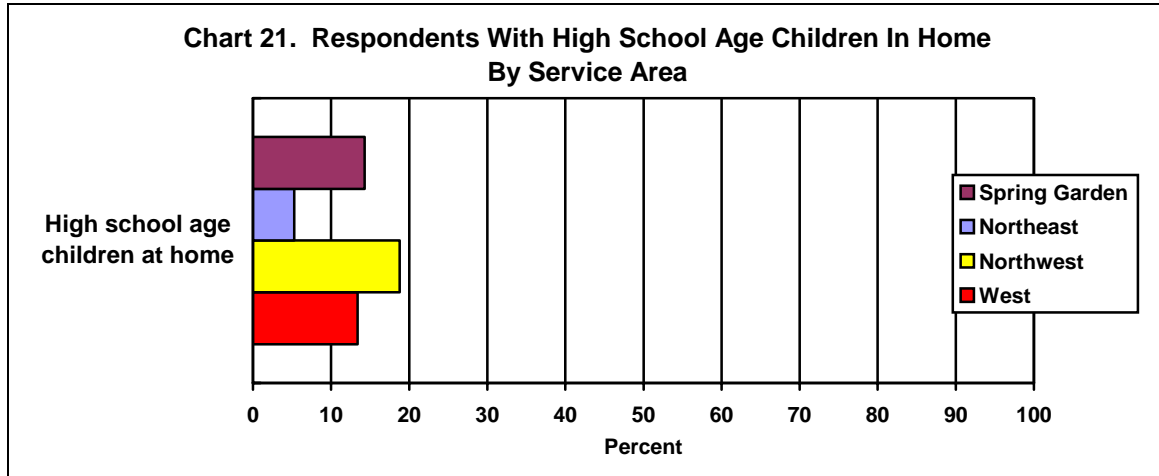
Ethnic minorities are slightly more likely to be interested in education and training, as seen in Chart 20. Forty-one percent of the college market segment are African-American, as are half of the job training market segment. While only 35 percent of the residents in the Spring Garden region are African-American and less than 10 percent in the Northeast region are African-American, more than two-thirds of the residents in the Northwest and West regions are African-American. Five percent of the college and the job training market segments are Spanish surname/ Latino and six percent are multiracial.

The potential college enrollees have household incomes comparable to the residents in the City. While 22 percent of the college market segment and 27 percent of the job training market segment have an annual family income of less than \$25,000, 26 percent of the residents in the Spring Garden region, 11 percent in the Northeast region, 28 percent in the Northwest region and 27 percent in the West region also have the same annual family income. Annual family incomes are also very comparable across the groups at the less than \$50,000 level. The residents in the Northeast and Northwest regions are almost twice as likely to be earning between \$50,000 and \$75,000 as the residents in the Spring Garden and West regions and the market segments.

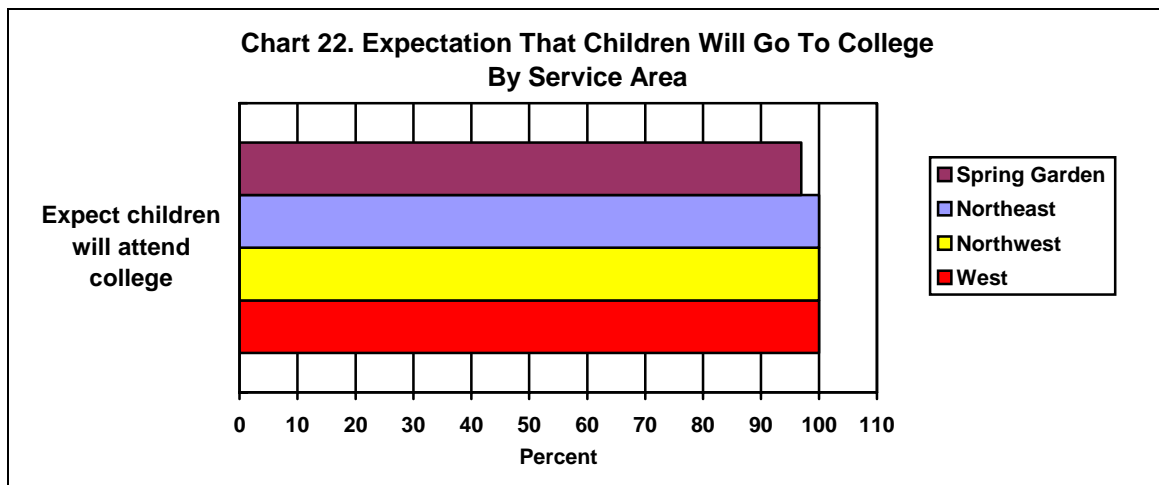
Finally, interviewers noted the gender of the respondent. Overall, two-thirds of the respondents were women (as usually found in these types of surveys) and women were more likely to have an interest in attending college.

Parents' Attitudes

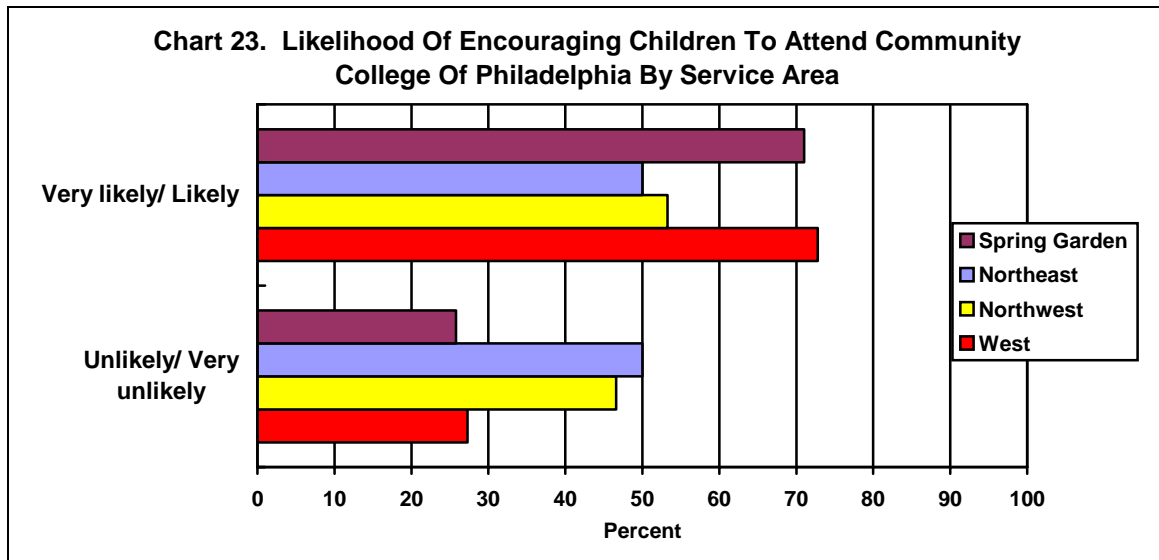
During the survey of residents in Philadelphia, the respondents were asked whether they had high school age children in their homes in the 2000 and 2005 surveys.



As seen in Chart 21, 14 percent of the respondents in the Spring Garden region had high school age children in their home, as did five percent of the respondents in the Northeast region, 19 percent in the Northwest region and 13 percent in the West region. The number of households with high school age children has increased in the last five years. In the 2000 Community Scan, only seven percent of the households interviewed in the Spring Garden and Northeast regions had high school age children, as did nine percent of the households interviewed in the Northwest and West regions.



The residents with high school age children were then asked if they expected that their children would attend college. More than 97 percent of the parents in the service area expect that their children will attend college (as seen in Chart 22). Only three percent of the residents with children in the Spring Garden region indicated their children would not attend college. Parents' expectation of children attending college has also increased from 2000 to 2005. In the 2000 Community Scan, 87 percent of the respondents with children in the Spring Garden and Northeast regions agreed their children would attend college, as did all of the respondents with children in the Northwest and West regions.



All respondents with high school age children were then asked how likely they would be to encourage their children to attend the Community College of Philadelphia and the results are presented in Chart 23. The respondents in the Spring Garden and West regions are the most likely to encourage their children to attend the Community College of Philadelphia. Seventy-three percent of the respondents with children in the West region and 71 percent in the Spring Garden region agree they would be likely or very likely to encourage their children to attend the Community College of Philadelphia. The respondents' rationale for encouraging the high school age children to attend the Community College of Philadelphia included: it is close, affordable (cheap), convenient, a good start on a four-year degree and a good school.

Only half of the other respondents (50 percent of those in the Northeast region and 53 percent in the Northwest region) would encourage their high school age children to attend the Community College of Philadelphia. Those who were unlikely to encourage their children to attend the Community College of Philadelphia noted that they wanted their children to go to a four-year college, want them to travel and children have a higher potential than the local two-year college.

Support has slightly dropped in the last five years from parents regarding children attending the Community College of Philadelphia. In 2000, 93 percent of the parents in the Spring Garden region, 88 percent in the Northeast region and 86 percent in the Northeast region agreed their children should attend the Community College of Philadelphia. By 2005, only 71 percent of the parents in the Spring Garden region, 50 percent in the Northeast region and 53 percent in the Northwest region agreed. The only positive change was seen in the West region where in 2000 43 percent of parents agreed their children should attend the Community College of Philadelphia and by 2005, 73 percent agreed.

Appendices

Appendix A. Questionnaire

Appendix B. Tabular Results By Classification

Appendix C. Tabular Results By Service Area

Appendix D. Detailed Verbatim Responses