



ADVANCE_360
EDUCATION

SEIZING THE OPPORTUNITY

The Market Shift from Higher Education
to Career Training in California



Advance 360 Education is pleased to be the 2023 CAPPS Visionary Sponsor.



THE NEXT 60 MINUTES

- Introductions
- Trends In The Education Marketplace
- Validation of Change
- 2023 Advance 360 Education National Education Survey
- Actionable Insights
- Q and A



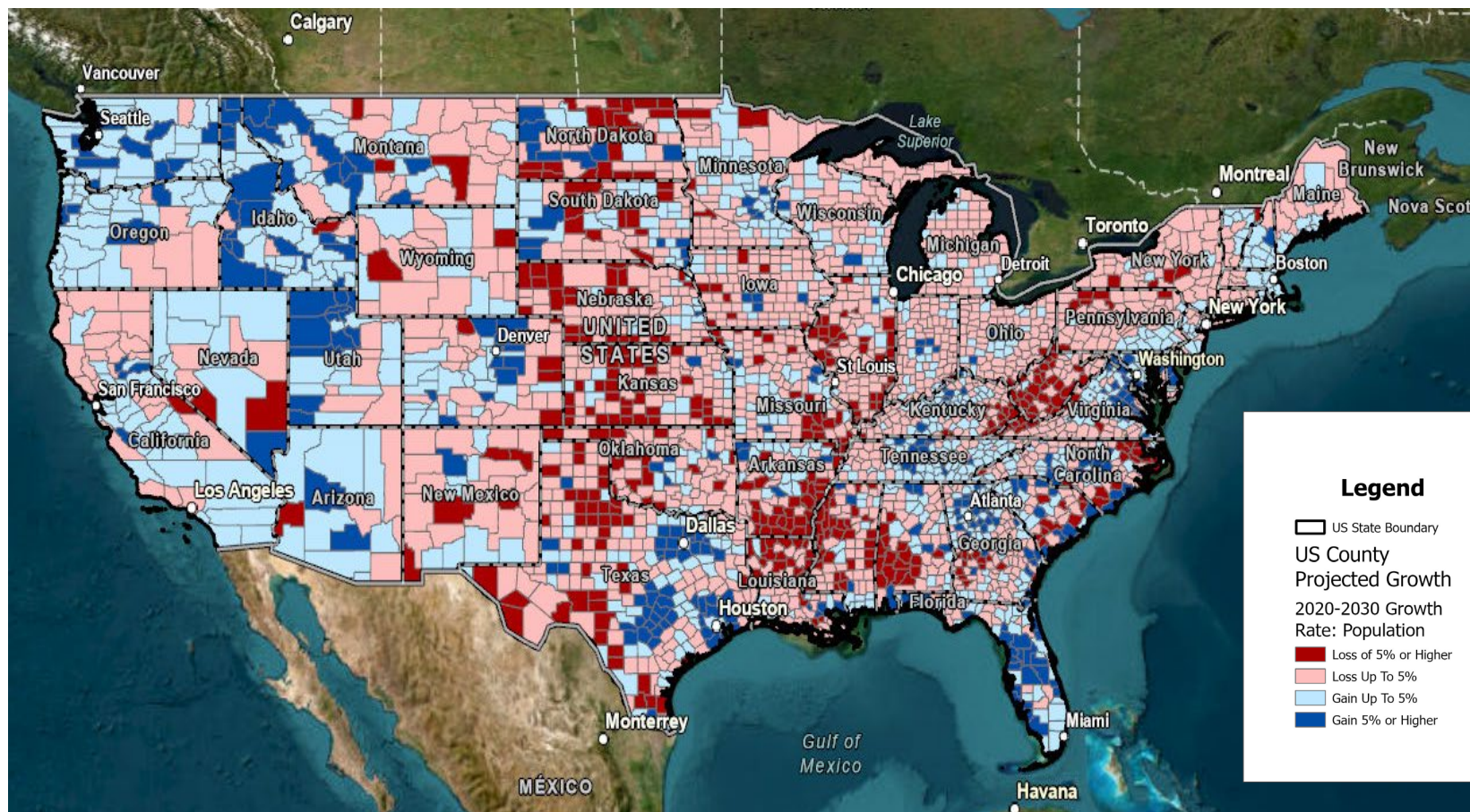
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TRENDS IN THE EDUCATION MARKETPLACE



TRENDS: NATIONAL POPULATION SHIFTS

Population patterns are generally shifting away from New England, Mideast, Rural Central, and Coastal California areas to the Pacific Northwest, Rocky Mountains, Southwest, Southeast, and South West regions



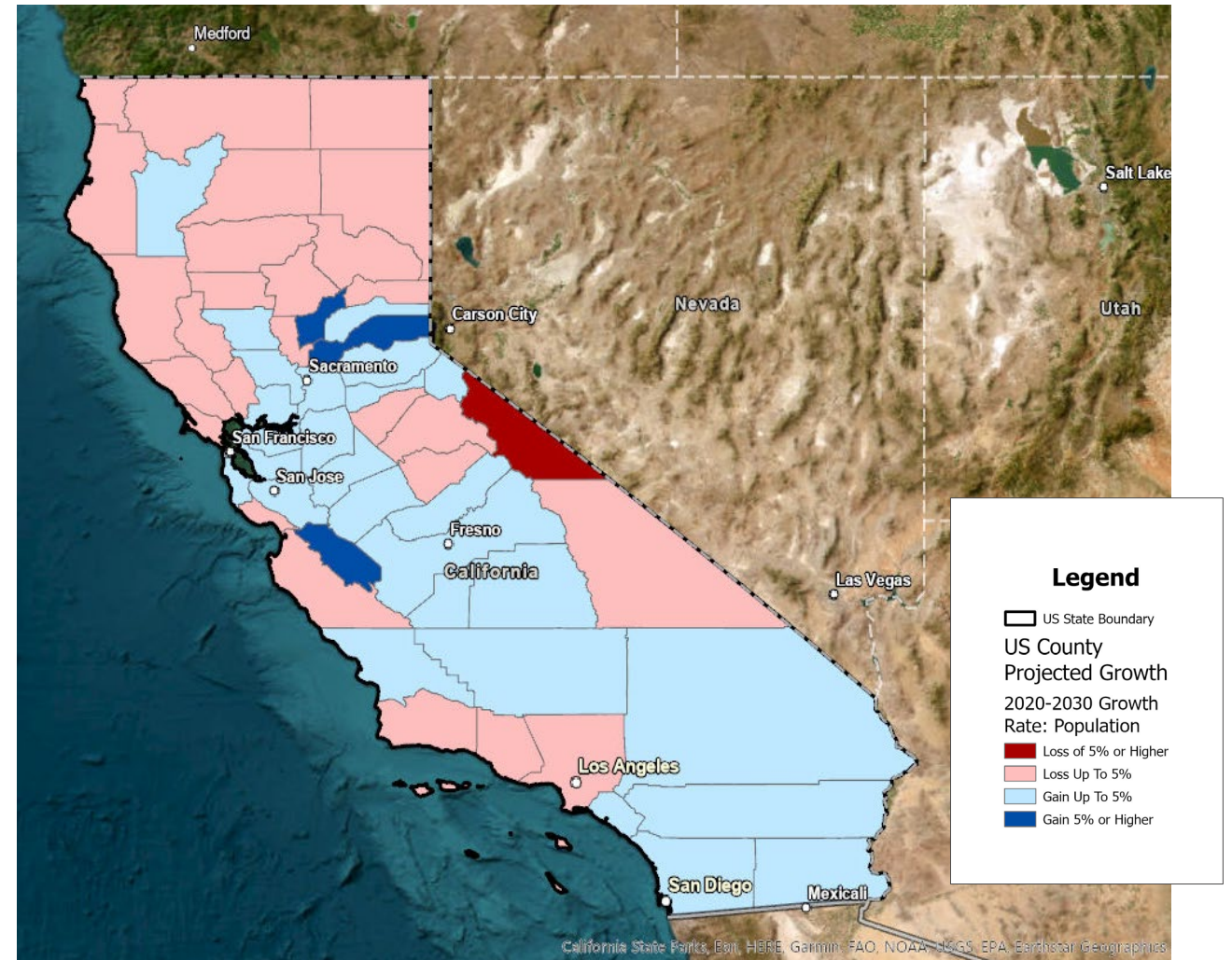


TRENDS: CALIFORNIA POPULATION SHIFTS

General shift in California is moving from north to central and southern regions, and from coastal areas inward to central and southern parts.

Three notable exceptions:

- Northern Sacramento into Lake Tahoe
- Southern San Francisco
- San Diego





CHANGING PERSPECTIVES ON EDUCATION

Employers are starting to recognize that a traditional college degree is not essential in some roles.

- Certain jobs are being redefined in their focus and responsibilities, resulting in modified prerequisite skills.

85% of people believe that post high school education and / or training is essential to securing a better job. Nearly 70% question the value proposition of that investment

- Traditional students (ages 16 to 24) are delaying school or working simultaneously
- Tier 2 (ages 25 to 34) are pursuing educational options that require shorter commitments to control the costs and maintain a greater life balance
- Tier 3 (ages 35 to 45) are bolstering work credentials and / or retraining to switch professions in a cost-effective manner



EVOLUTION WITHIN EDUCATION MARKET

The convergence of population shifts and changing perspectives are driving an evolution within the education market:

- Online degrees / training
- Shorter time to in-person degrees
- Certifications through schools and private companies
- Self-paced training in specialties





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VALIDATION OF CHANGE



VALIDATION OF CHANGE: NATIONAL STATISTICS

Governmental and private sector sources* estimate that 20% - 30% of all professional jobs will change educational requirements by 2030 to drop or modify mandatory 4-yr degrees as terms for employment consideration.

- 30 million+ jobs demonstrated pre-Covid degree-requirements changed by an average of 15% within Financial Services, Medical Services, and Real Estate sectors. *Harvard Business Review Study*
- Changes in the technology industry as Accenture and IBM revamped 80% of their IT job education requirements. *Wall Street Journal, 2021*
- White House dropped 4-yr degree requirements for all IT positions, as of 2022.
- Some Republican and Democratic controlled State and city governments have dropped 4-yr degree requirements altogether (with exception of some specialized roles).
- As of 2023, Bank of America no longer requires traditional college degrees for 90% of its entry level jobs and has implemented its *Pathways* program to hire 30,000 from low-income neighborhoods by 2025.
- Google no longer requires traditional college degrees for 95% of positions.



VALIDATION OF CHANGE: CALIFORNIA

In August 2023, Gov. Gavin Newsom, as part of the *Freedom To Succeed* initiative, signed an executive order directing the California Human Resources Department (CalHR) to re-evaluate whether 4-yr college degrees are needed for jobs that currently require them

- California's Master Plan On Career Education prioritizes making jobs available to underserved communities by developing hands-on real-life skills and streamlining state bureaucratic hiring processes
- California is investing billions in essential long-term areas of need, including Construction, Healthcare, Renewable Energy, and Transportation



VALIDATION OF CHANGE: CALIFORNIA JOB POSTING EXAMPLES

Sample job postings demonstrate six-figure opportunities for 2-yr and Trade / Vocational program graduates with sufficient experience (5 -10 years) and skills training.

Hotel Manager, The Ritz-Carlton, Los Angeles

Marriott International, Inc [🔗](#)

★★★★☆ 24,081 reviews [🔗](#)

📍 900 West Olympic Boulevard, Los Angeles, CA 90015

\$155,000 - \$198,000 a year - Full-time

You must create an Indeed account before continuing to the company website to apply

[Apply on company site](#) [🔗](#)



CANDIDATE PROFILE

Education and Experience

- 2-year degree from an accredited university in Business Administration, Hotel and Restaurant Management, or related major; 8 years' experience in the management operations, sales and marketing, or related professional area.

Quality Manager

MW Industries, Inc. [🔗](#)

📍 901 W Mccoy Ln, Santa Maria, CA 93455

\$100,000 - \$135,000 a year - Full-time

[Apply now](#)



EDUCATION and EXPERIENCE

- Technical Degree (STEM) and/or formal training relatable to Quality Management Systems.
- Experience in production and quality control methods (ISO9001, AS9100 etc.) preferred.
- Previous experience in Lean Manufacturing implementation and production systems helpful.
- Possesses a moderate understanding of general aspects of the job.

Staff iOS Engineer, Cybersecurity

Dexcom [🔗](#) ★★★★★ 375 reviews [🔗](#)

📍 6290-6350 Sequence Drive, San Diego, CA

\$141,800 - \$236,400 a year

You must create an Indeed account before continuing to the company website to apply

[Apply on company site](#) [🔗](#)



What makes you successful:

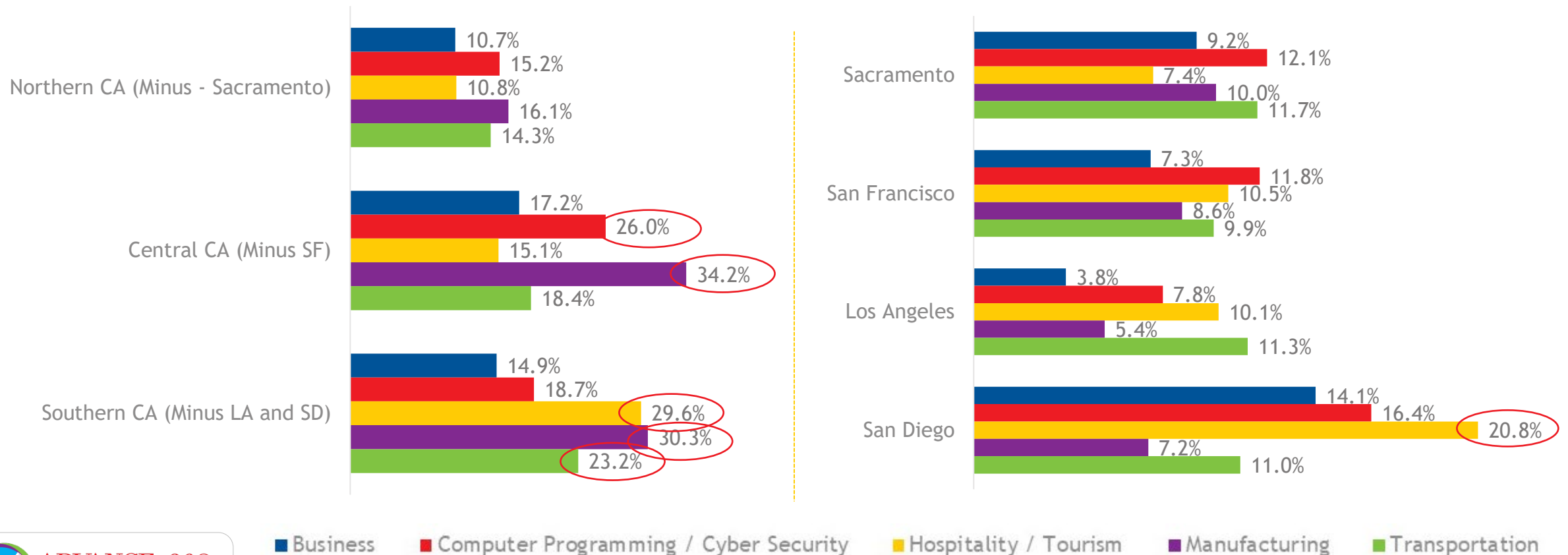
- Minimum 5 years of native iOS app development experience using Swift and Objective C and 8 years of professional software development experience
- Proficiency in software development lifecycle process
- Hands-on experience in developing mobile applications
- Must have strong verbal and communication skills
- High degree of diligence in documentation, testing and coding
- Able to identify gaps and then enable team to address those gaps



5-YEAR CALIFORNIA JOB POSTINGS – CHANGES IN EDUCATION REQUIREMENTS

Analysis of random California online job-postings from the past 5 years demonstrates the change in employer's perspectives

PERCENT CHANGE OF SAMPLED CA JOB POSTINGS THAT NO LONGER REQUIRE A TRADITIONAL 4-YR DEGREE





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2023 NATIONAL EDUCATION SURVEY



ADVANCE 360 EDUCATION NATIONAL SURVEY: OVERVIEW

Advance 360 Education's national survey of parents and students was conducted in Q2 of 2023 to gain detailed insights into how these groups make decisions about post-secondary education.

TOTAL RESPONSES

PARENTS:

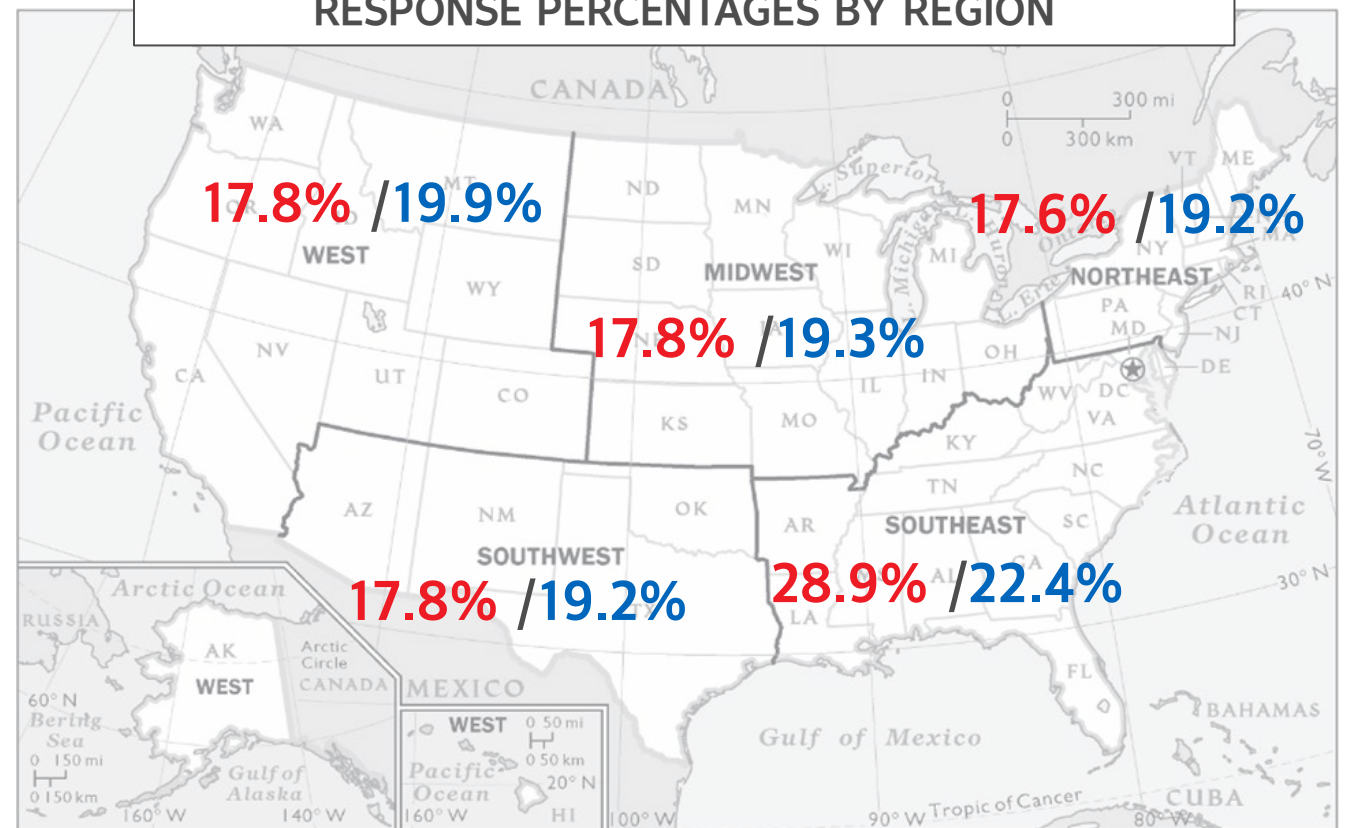
1,978

STUDENTS:

1,817

Results meet statistical significance at the 95% threshold.

RESPONSE PERCENTAGES BY REGION

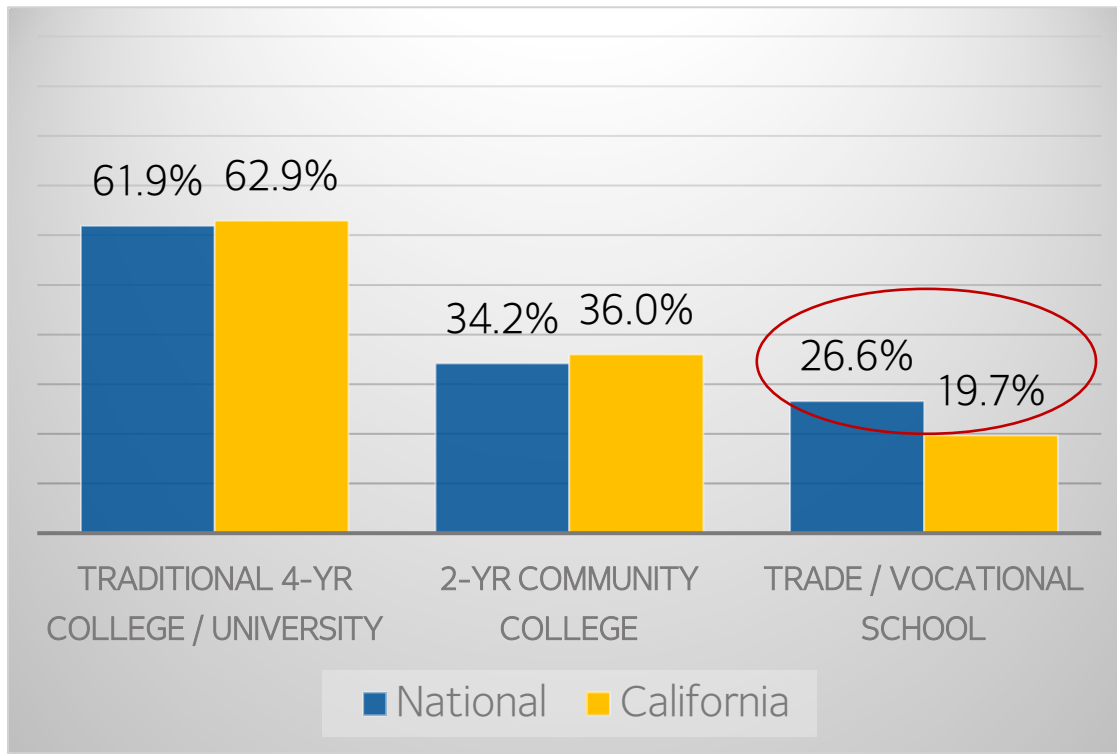




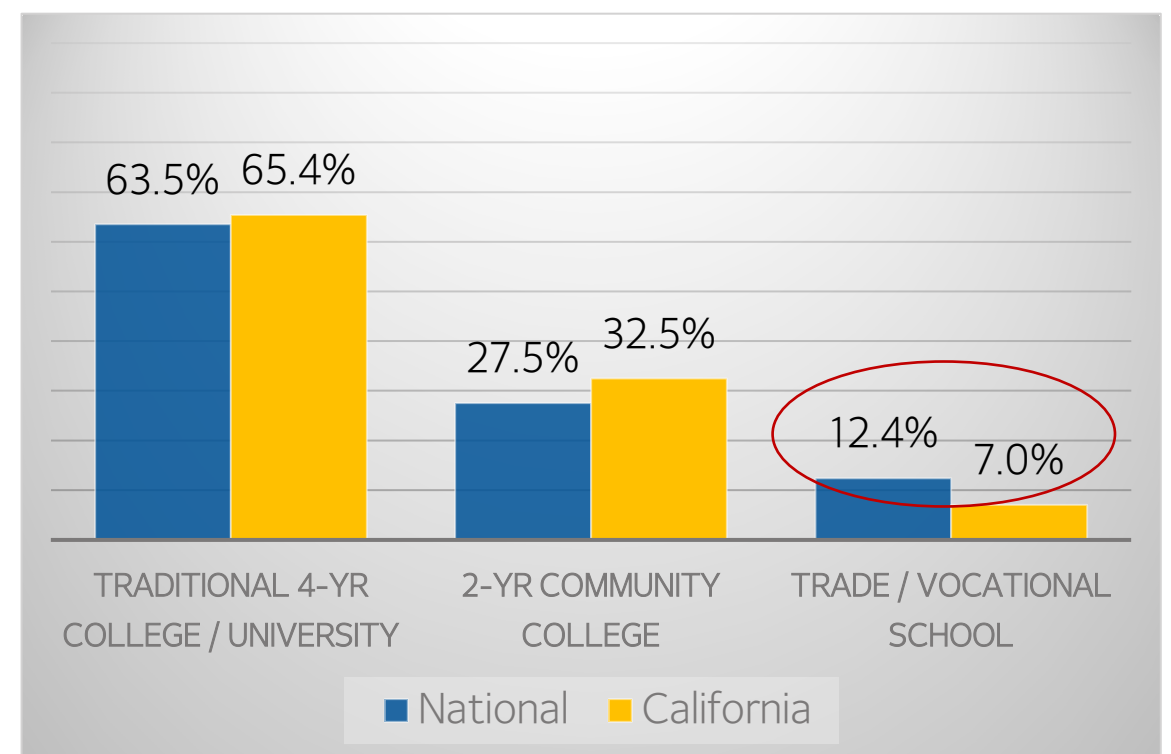
POST HIGH SCHOOL PATHS BEING CONSIDERED

2/3 of both parents and students are considering traditional colleges / universities, while only 1/3 is considering 2-yr schools. California students are substantially less interested in Trade / Vocational schools (only 7%)

RESPONSES BY PARENTS



RESPONSES BY STUDENTS

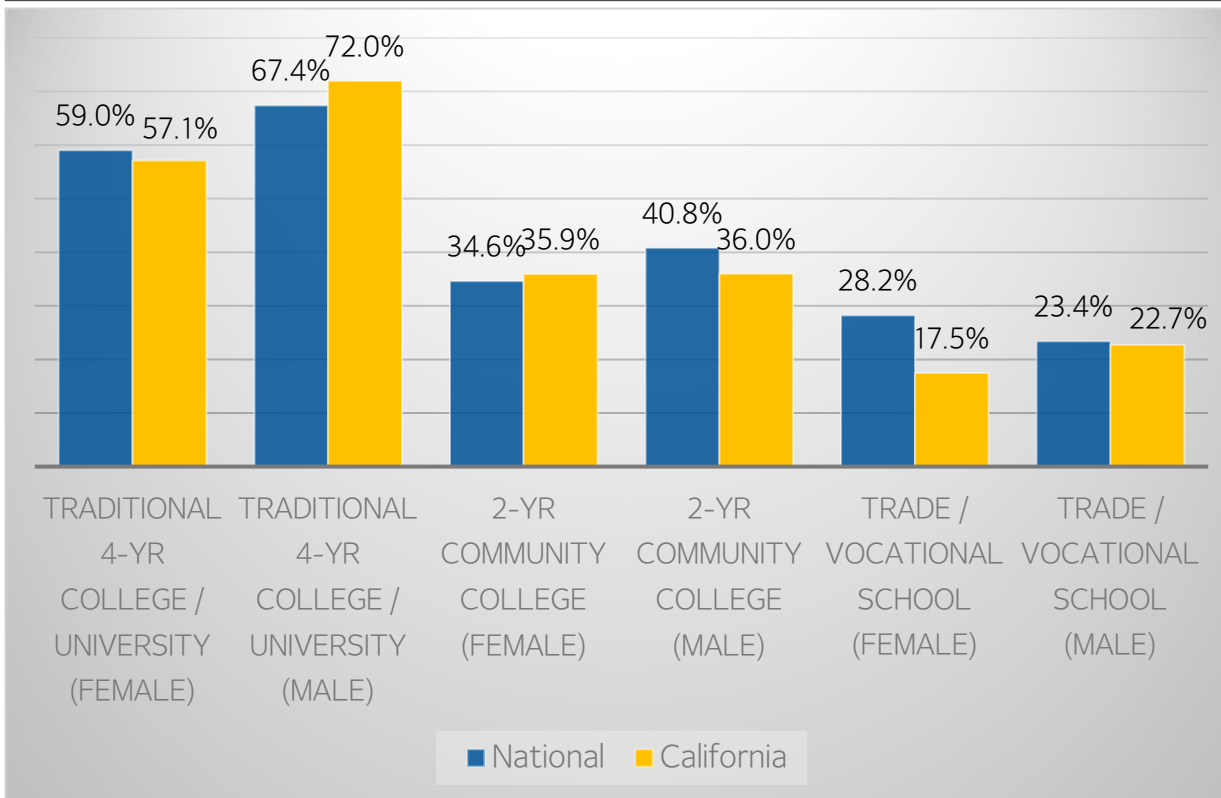




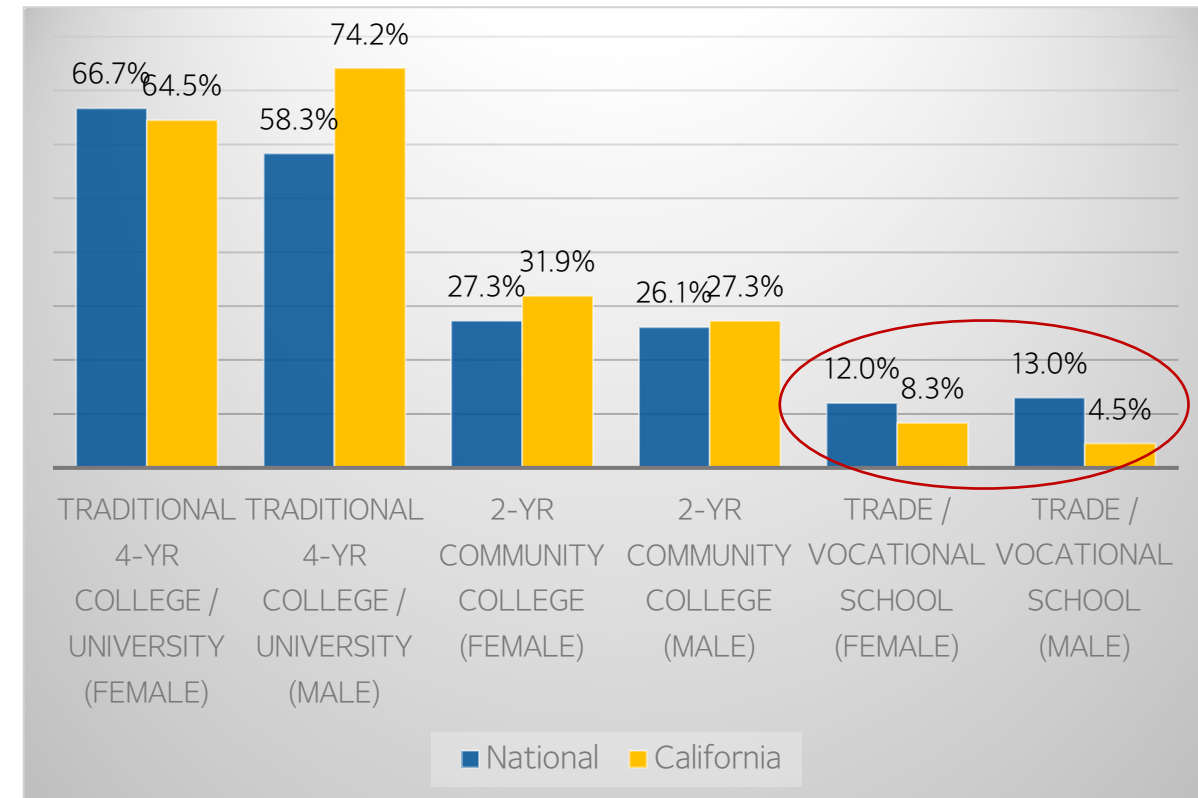
POST HIGH SCHOOL PATHS BEING CONSIDERED | BY GENDER

Over 70% of California males (parents and students) are focused on traditional colleges / universities, while less than 5% of male students are considering Trade / Vocational options.

RESPONSES BY PARENTS



RESPONSES BY STUDENTS

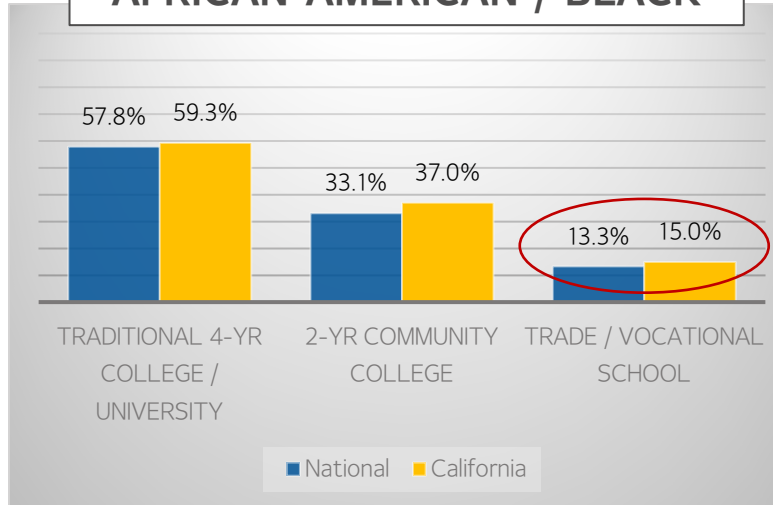




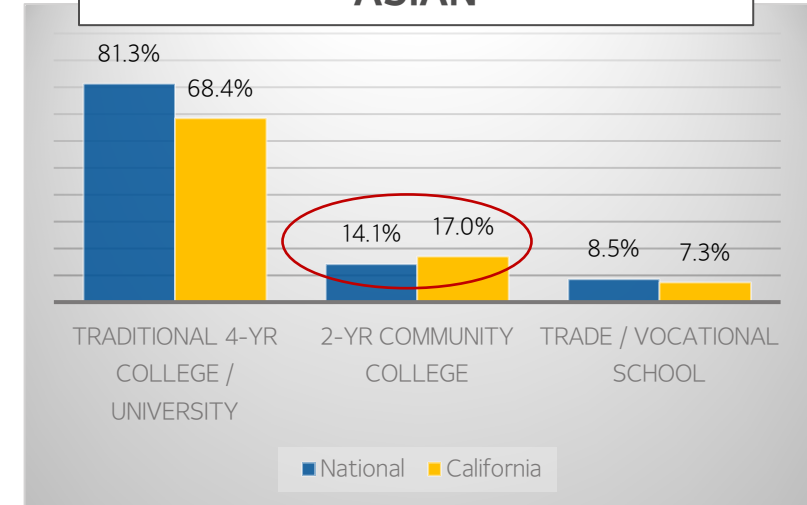
POST HIGH SCHOOL PATHS BEING CONSIDERED | BY RACE / ETHNICITY

- 75% of white California students are pursuing traditional colleges / universities.
- Asian California students are significantly less interested in 2-yr programs than other groups (17% vs. 32% or higher).
- 15% of black California students are interested in Trade / Vocational schools, compared to less than 10% of others (including less than 5% of Hispanics).

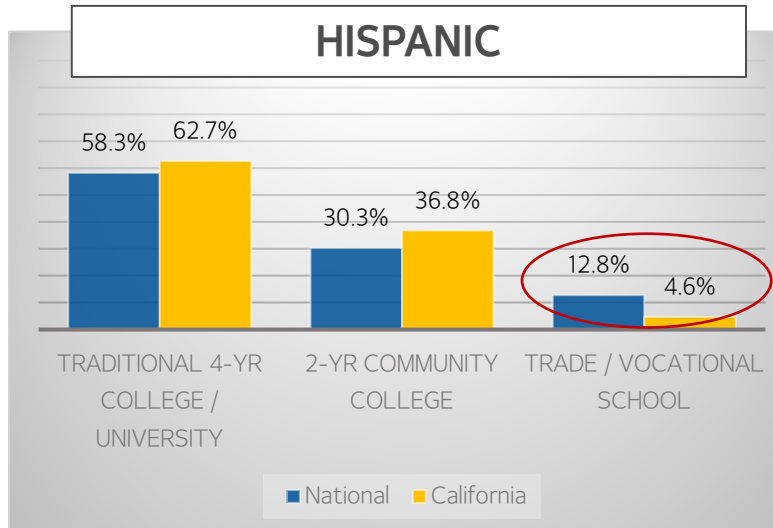
AFRICAN AMERICAN / BLACK



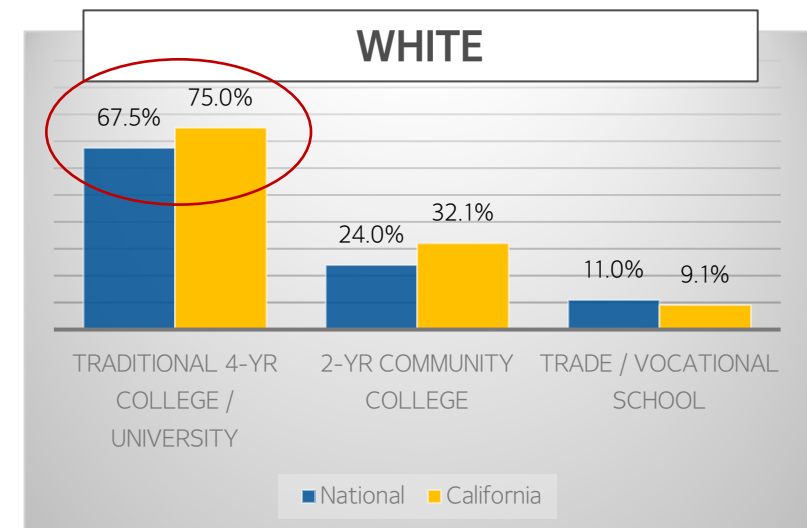
ASIAN



HISPANIC



WHITE





OBSERVATIONS: WHAT THE DATA TELLS US

While the market dynamics are clearing shifting relative to employer perspectives and job demand in certain fields, a lag exists relative to student adoption of 2-year and trade / vocational programs in California.

- Lack of publicity / understanding around Trade / Vocational job opportunities
- Stereotypes / Stigma
 - Dirty work for low pay; Training not worth the money
 - Unstable jobs prospects in times of recession
 - Class warfare / Elitist attitudes

Parents in California are under the impression that students are considering vocational education at a higher rate than is the case.





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ACTIONABLE INSIGHTS

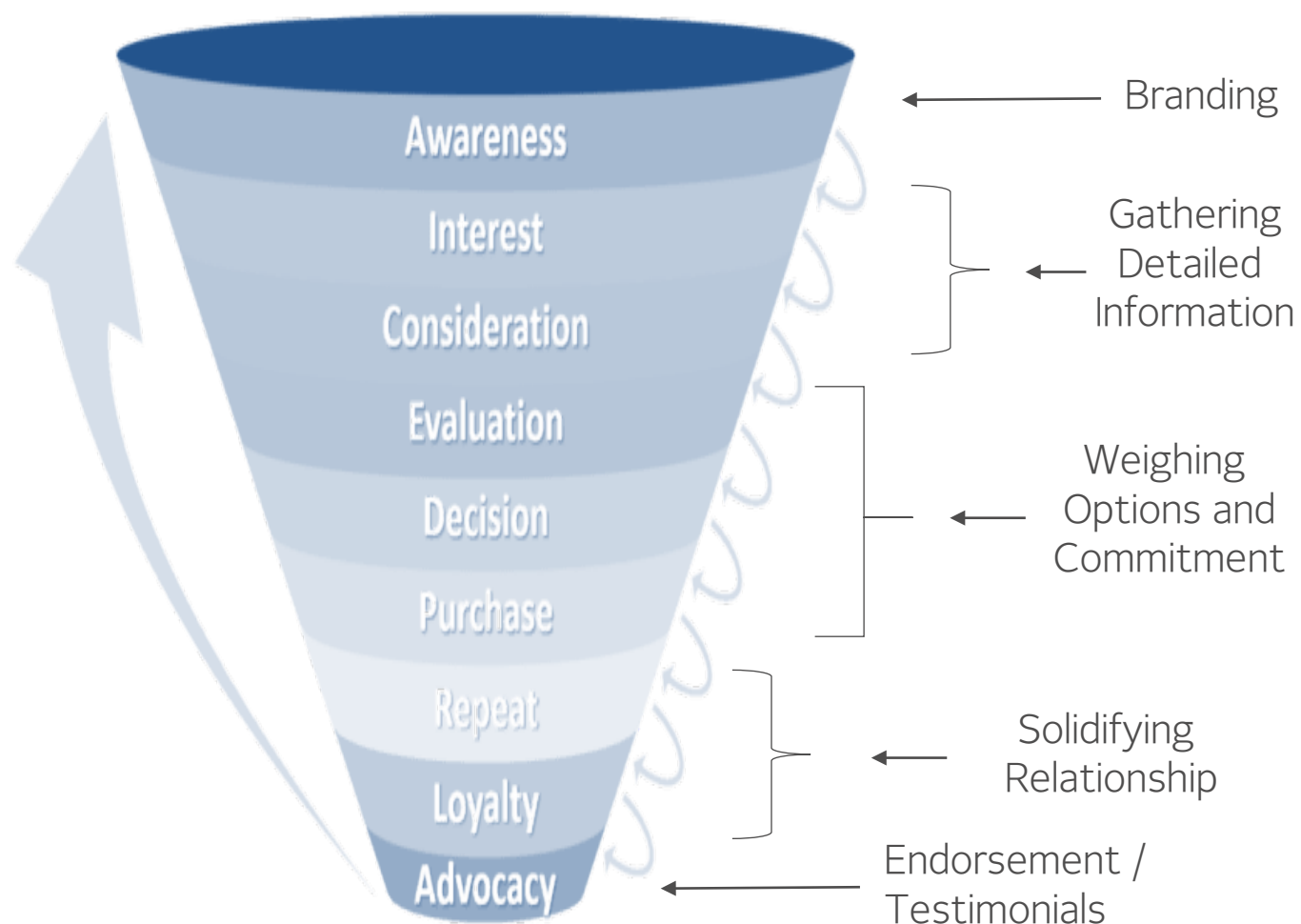
ASSOCIATE DEGREE – CERTIFICATE SEEKERS



THE FUNNEL

Parents and students – different ages, genders, racial / ethnic groups, etc. – digest information from different sources in different ways and make decisions based on different factors

A comprehensive, unified strategy involving multiple creative and messages through an assortment of channels is critical to success





UNDERSTANDING THE STUDENT JOURNEY | CROSS CHANNEL ATTRIBUTION

Successful strategy recognizes what media potential students are seeing, engaging with and leveraging to make school decisions and that all prospects are not the same.



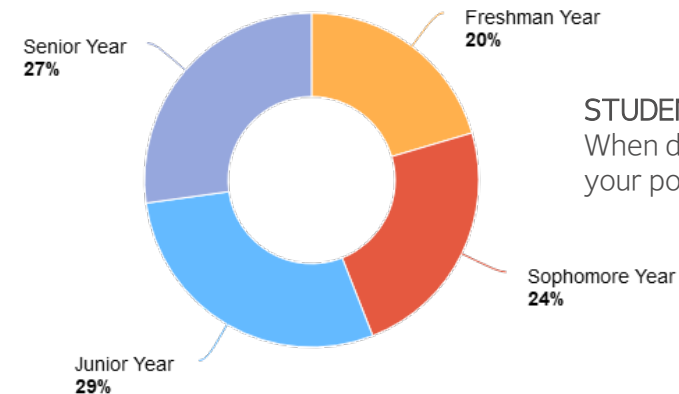


THE JOURNEY

Most high school students seeking a certificate of associates degree begin their evaluation of post-secondary educational options during or after their junior year .

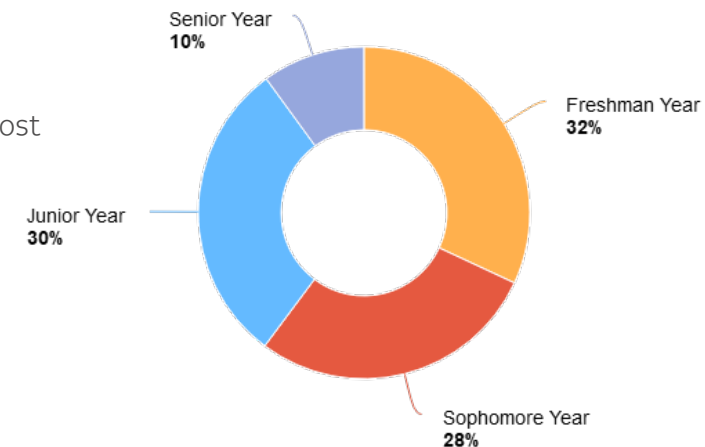
- Hispanic students start later than White or Black students.
- Those seeking a four-year degree start earlier, a critical point for career-focused educational institutions to recognize.

Parents report that schools should begin communicating earlier than when students report first considering.



STUDENTS:
When did you first start looking into your post-high school education options?

PARENTS:
When should schools start communicating about their child's post high school education options?





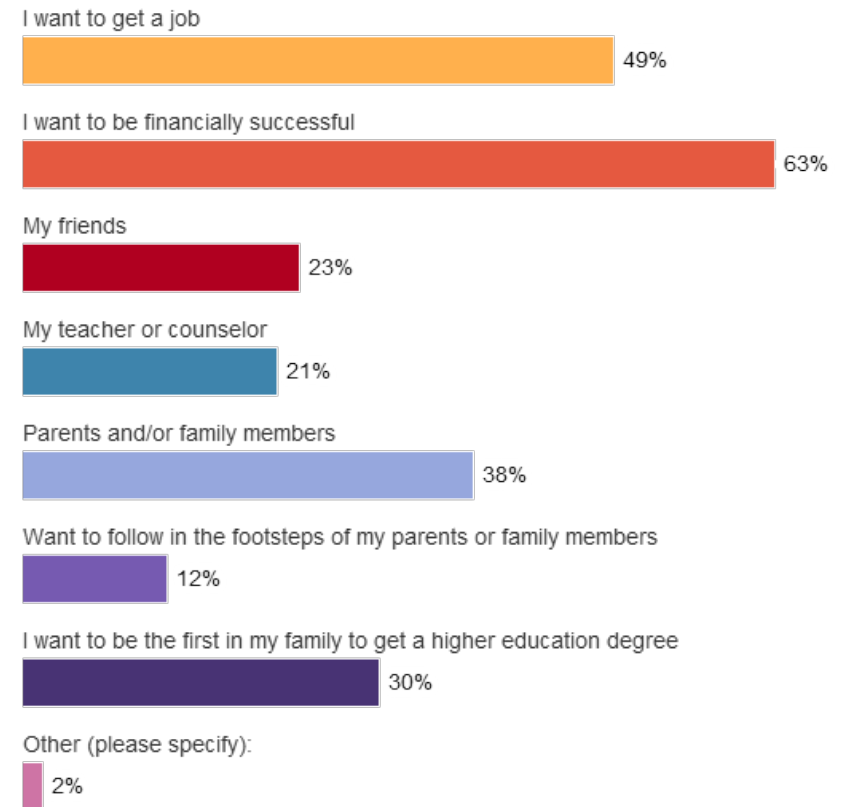
MOTIVATIONS

Understanding motivations is critical to messaging.

- Financial success and employment prospects serve as the primary motivating factors
- Familial influence, including the aspiration to be the first in one's family to pursue education beyond high school, also plays a significant role and even more so for Hispanic students than White or Black.

STUDENTS:

What are the biggest motivators for you to pursue education after high school (respondents selected all that apply)





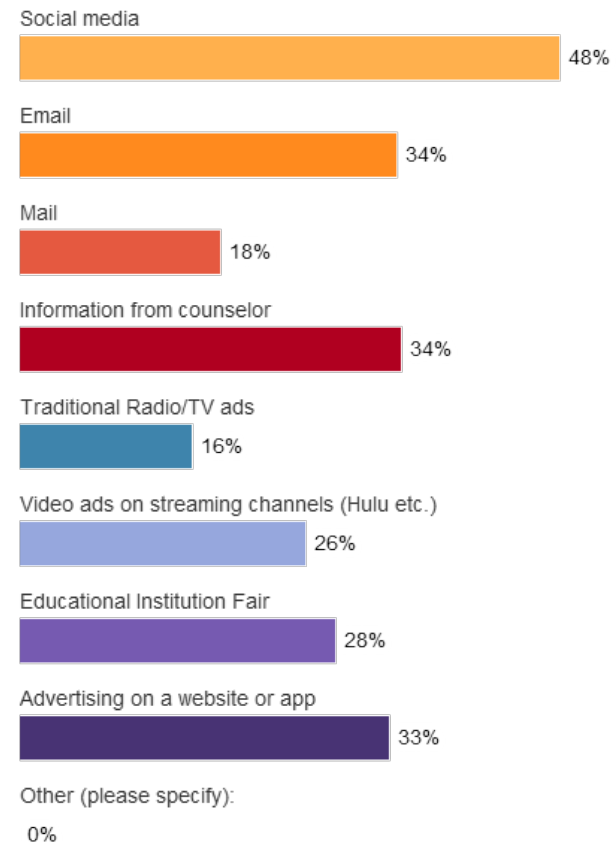
CHANNELS

An integrated, multi-channel marketing approach is critical.

- Social media ranks as a channel where student prospects most commonly pay attention to school marketing.
- However, a diverse array of additional channels all play a role.

STUDENTS:

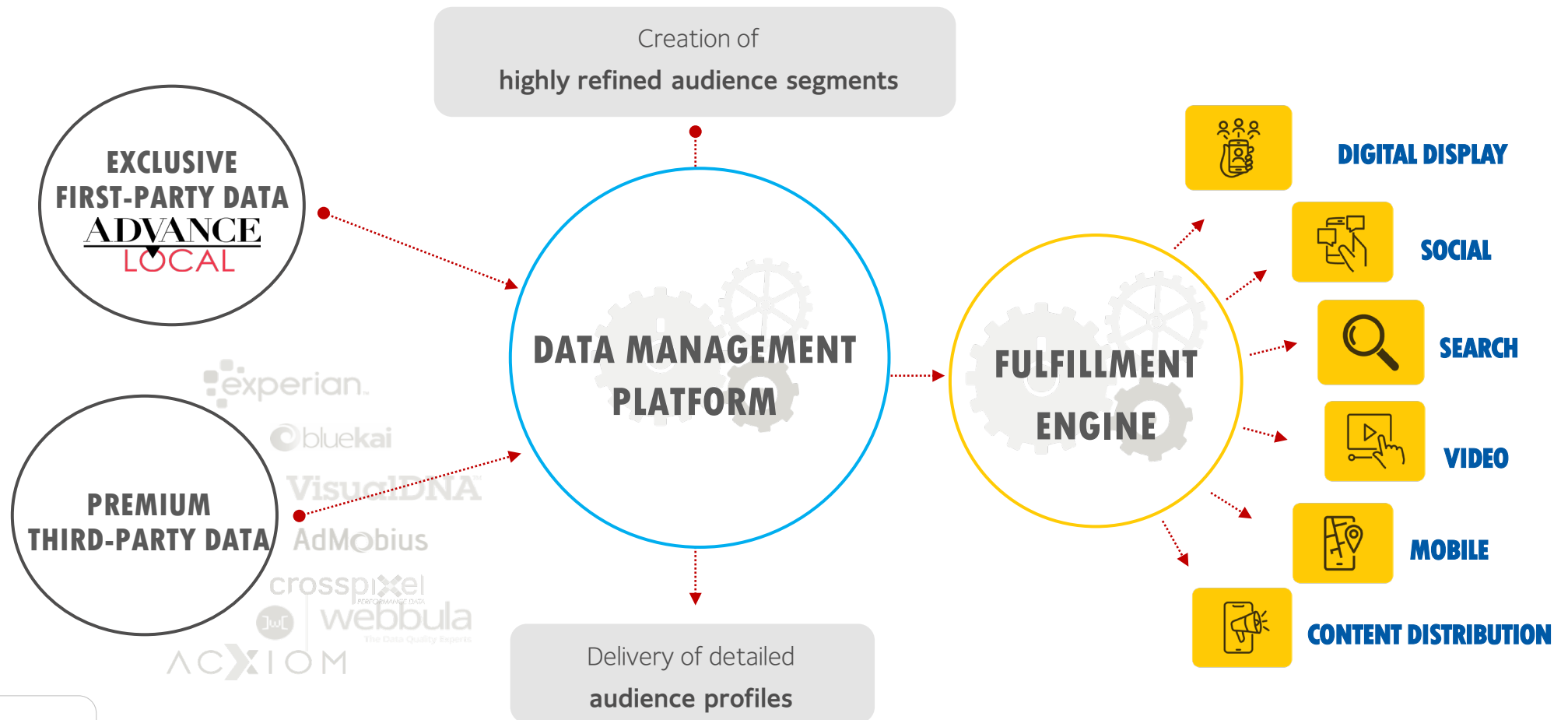
Where do you pay attention to school marketing the most? (respondents selected up to 3)





DEPTH OF DATA IS A COMPETITIVE ADVANTAGE

A strategic approach to segmentation and message delivery to deliver qualified inquiries





DATA CREATES AUDIENCES

DATA PROVIDERS

ACX IOM

experian™

crosspixel
PERFORMANCE DATA

VisualDNA™

AdMobius

datalogix®

webbula
The Data Quality Experts

NinthDecimal

bluekai

MasterCard Advisors™

DATA MANAGEMENT PLATFORM

LOTAME™

CUSTOMIZE YOUR TARGET AUDIENCE

Age 18-29 AND education
interest / intent

Medical Assistant, Nursing, Home
Heath Care interest / intent

Current hospital worker looking
for more routine 9-5 job hours

Medical tech interest:
EKG, Phlebotomy, etc.

Stay at home parents/guardians
with school aged children looking
for career training

Laid off and furloughed employees

High school students, about to
graduate with no immediate plans



DATA DICTATES PLATFORMS AND STRATEGIES

CUSTOMIZE YOUR TARGET AUDIENCE

- Age 18-29 AND education interest / intent

- Medical Assistant, Nursing, Home Health Care interest / intent

- Current hospital worker looking for more routine 9-5 job hours

- Medical tech interest: EKG, Phlebotomy, etc.

- Stay at home parents/guardians with school aged children looking for career training

- Laid off and furloughed employees

- High school students, about to graduate with no immediate plans



QUESTIONS

We look forward to putting the power of
Advance 360 Education to work for your school.

OUR RESULTS ARE REAL. LET'S TALK

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SEGMENTATION IS CRITICAL

- Comprehensive approach | A non-linear journey
- Media channels
- Messaging

JOEL TO UPDATE
SLIDE FOR CAPPS





MEDIA CHANNEL SELECTION | SOCIAL SAMPLE: STUDENTS

Gender comparisons show tremendous differences between which social media platforms are most utilized by female versus male students. **A gender balanced approach to social media strategy requires depth of channels.**



M= 54%

F= 35%



M= 39%

F= 44%



M= 23%

F= 31%



M= 41%

F= 47%



M= 16%

F= 6%



MESSAGING: PARENT SAMPLE

Male parents are more concerned with **Cost / Financial** (59% vs. 47%), while
Female parents are more focused on **Happiness / Safety** (56% vs. 40%)

MALE

- "Affordable Higher Education, Uncompromised Quality: Shape Futures Without Financial Stress."
- "Smart Financial Choices for Your Child's College Years: Quality Education, Affordable Tuition."
- "Strategic Investment in Your Child's Future: Quality, Affordable Higher Education."
- "Achieve More with Thoughtful Spending: Accessible, High-Quality College Education."
- "Quality Education, Responsible Budgeting: Secure Your Child's Future Without Sacrifice."

FEMALE

- "Ensuring Your Child's Happiness and Success: Schedule a Campus Tour."
- "Prioritizing Your Child's Well-being: Join Our Respected Institution for Higher Learning."
- "A Secure and Fulfilling College Experience: Where Your Child's Growth Matters Most."
- "Empower Your Child's Journey in a Safe Environment: Gain Peace of Mind and Visit Today."
- "Where Academic Excellence and Safety Converge: Explore Our Trusted College for a Bright Future."