

A background image showing a young woman with dark hair, wearing a grey t-shirt, smiling and looking towards a young man with light brown hair, wearing a blue button-down shirt. They are sitting at a desk with a laptop and some papers. The scene is brightly lit, suggesting a window in the background. In the bottom right corner, there is a decorative graphic of overlapping geometric shapes (polygons) in shades of green and blue.

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where informed decisions begin

Transfer Student Marketing: A Persona-Based Approach

Tuesday, November 9, 2021

Today's Speaker



Johanna Trovato
Eduventures Senior Analyst

Johanna serves as a strategic thought partner for higher education leaders across the student lifecycle. She is passionate for client-facing work and connecting research with her clients' needs.

Originally from Germany, she graduated from Justus Liebig University in Giessen with a Diplom degree (equivalent of an M.S.) in Social Sciences before she relocated to the United States.

The Turbulent Transfer Environment

In the current environment, transfer student recruitment faces several headwinds



- Declining enrollment at community colleges
- Change to NACAC Code of Ethics
- Uncertainty of pandemic impact on transfer plans

In Spring 2021, We Asked College Freshmen About Their Plans

- 34% of all college freshmen told us their enrollment decision had been influenced by the pandemic
- 30% in total said they would likely or definitely transfer
- 11% of all college freshmen said they had transfer plans that were related to the pandemic
- It appears COVID has shaped transfer plans, but not dramatically
- Or has it?

Eduventures Transfer Student Research

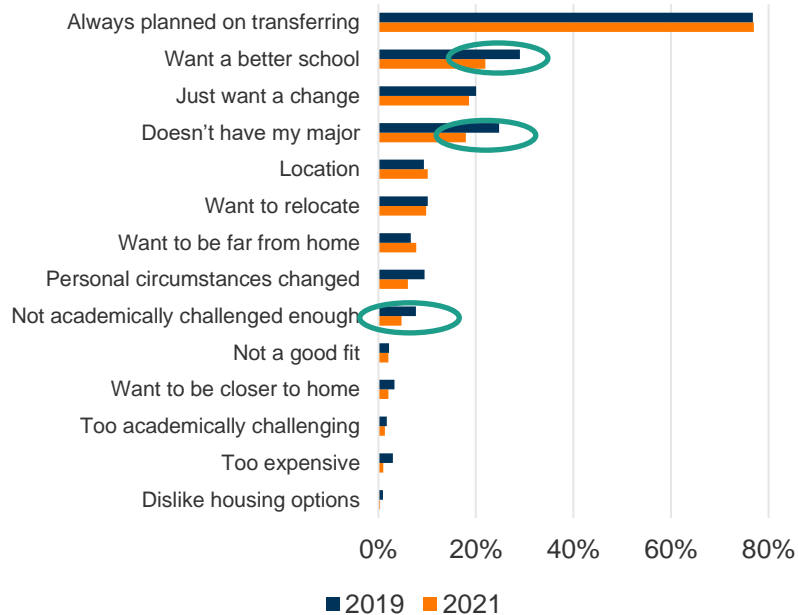
How do transfer students experience their school search?

- Online survey with current undergraduate students
- Students who were **likely to transfer** or had **already transferred** qualified
- Data collected in 2019 and 2021
- Motivations, priorities and concerns at the core of the survey

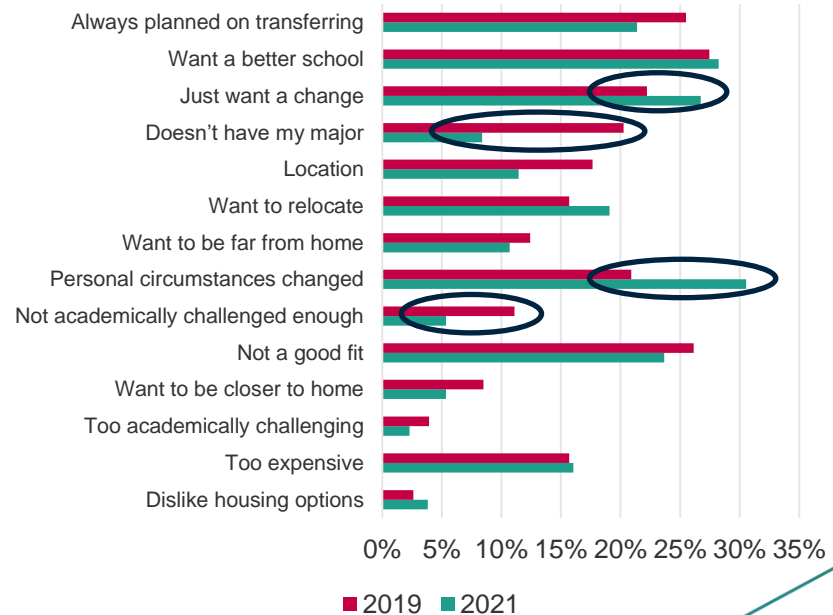


Why Do Students Want to Transfer?

Transfer Reasons 2-Year Students

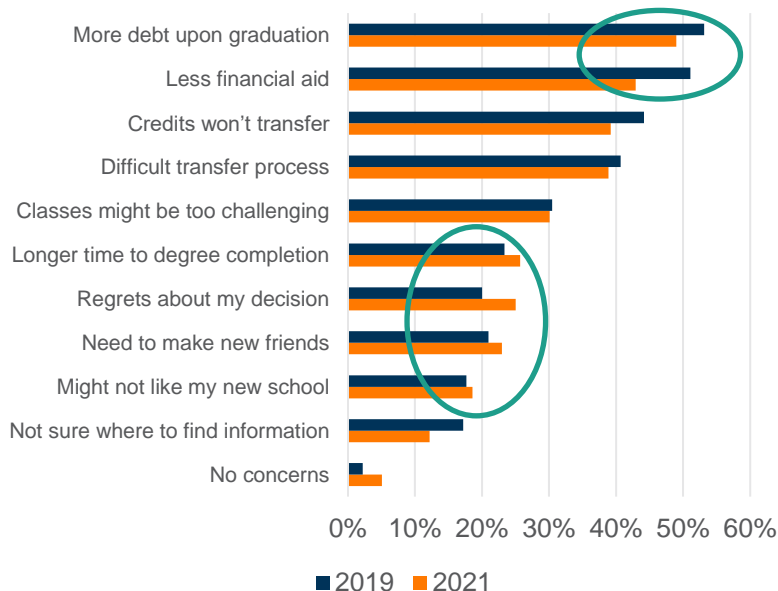


Transfer Reasons 4-Year Students

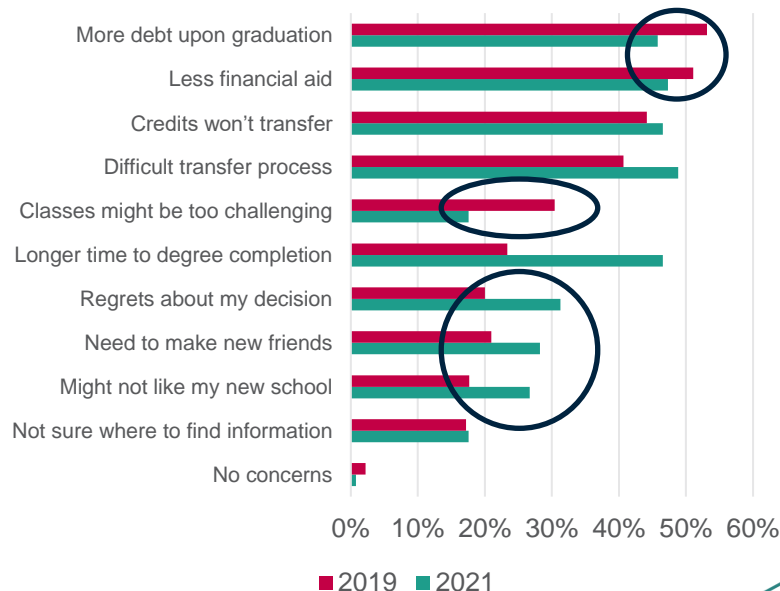


What Are Their Concerns about Transferring?

Transfer Concerns – 2-Year Students



Transfer Concerns – 4-Year Students



How the Pandemic Has Shaped Transfer Students

- Students at 2-year schools seem less affected in the nature of their transfer plans, but there are fewer of them.
- Students at 4-year schools appear more driven by circumstance and more ambivalent about their transfer plans.
- How does this help you refine your transfer recruitment outreach?
- Let's solve this by looking beyond school type and considering what is on students' minds.
- Let's look at a typology of transfer students...

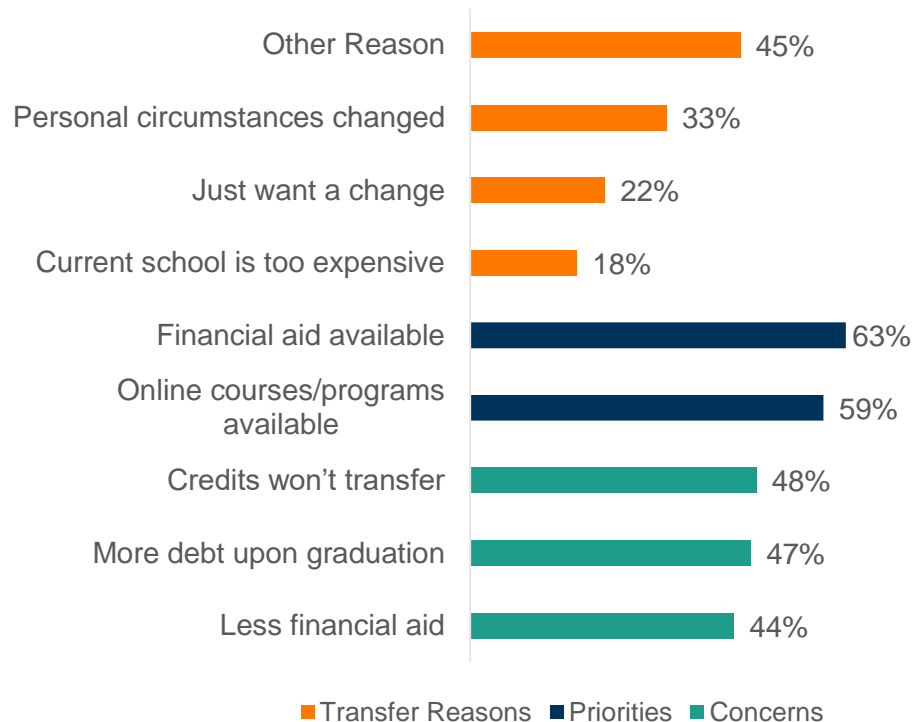


Prospective Transfer Types



Life Happens	Trading Up	Help Wanted	Find My Passion	Follow the Plan	Cost Saver
Personal circumstances have changed for these students, and now they are looking for a more flexible or affordable education option, often in a new location.	These students seek more prestige and rigor. Some also want to spread their wings and move farther from home.	Looking for a change, these students are often driven by academic struggles. They seek better support services and, sometimes, more flexibility.	These students want a school that offers a specific program or location, which they perceive to be a better choice than their current school.	Transferring to a more rigorous school was always part of the plan. Aside from rigor, these students seek a specific location, but also a school that will likely accept them.	These students always wanted to transfer to save money. Cost is the single most important factor in selecting a transfer school.

Life Happens



Who Are These Students?

- Slightly less first-generation
- Slightly more low-income
- More white
- Balanced in gender
- Unsure if parents will contribute to college financing
- Slightly more open to educational loans

Most Useful Resources in School Search

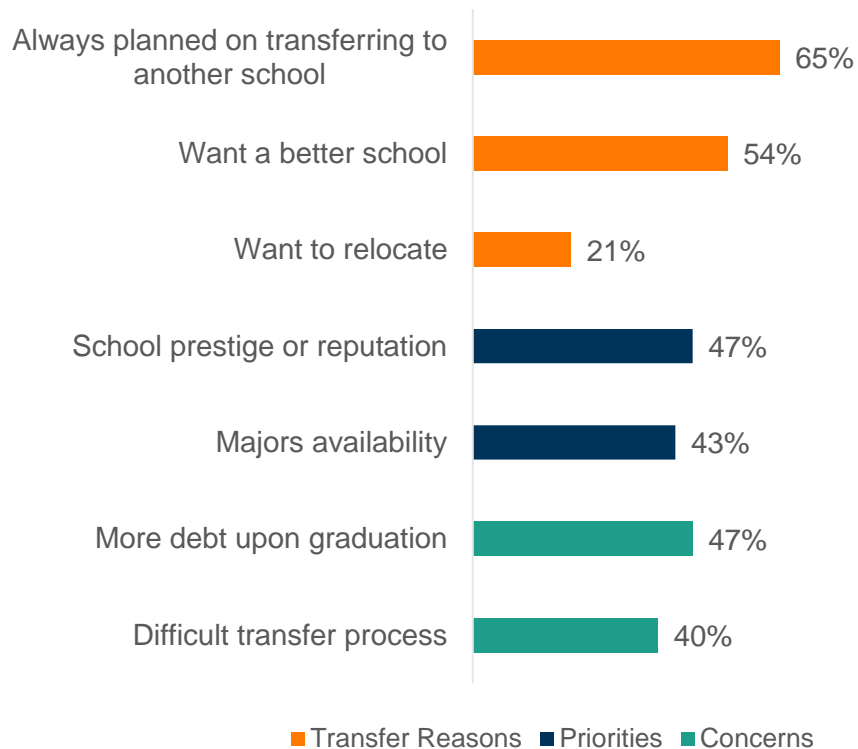
- Online search engines
- Advisor at current school
- Family and friends

Prospective Transfer Types



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Trading Up



Who Are These Students?

- Slightly less first-generation
- More high-income
- More Asian
- More men
- Some parents will finance all of college, others will only contribute little
- Average expectations around scholarships, but less inclined to take out loans

Most Useful Resources in School Search

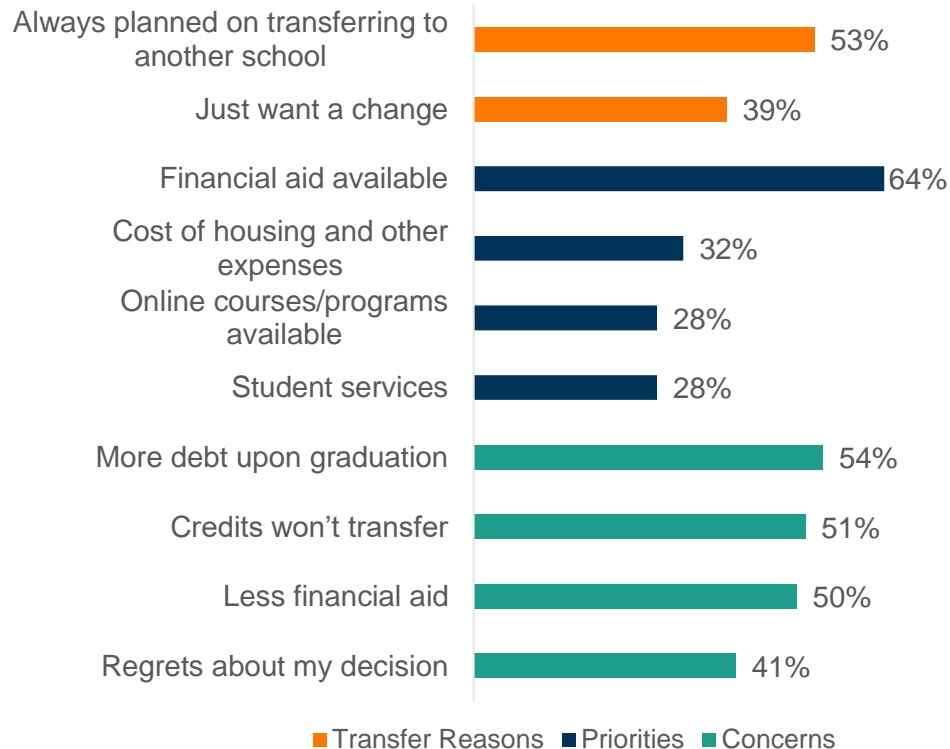
- Campus visits
- Advisor at transfer school
- Institutional websites

Prospective Transfer Types



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Help Wanted



Who Are These Students?

- More first-generation
- More low-income
- More Hispanic/Latino
- More men
- Parents and student contribute equally to college financing
- Most likely to have loan expectations

Most Useful Resources in School Search

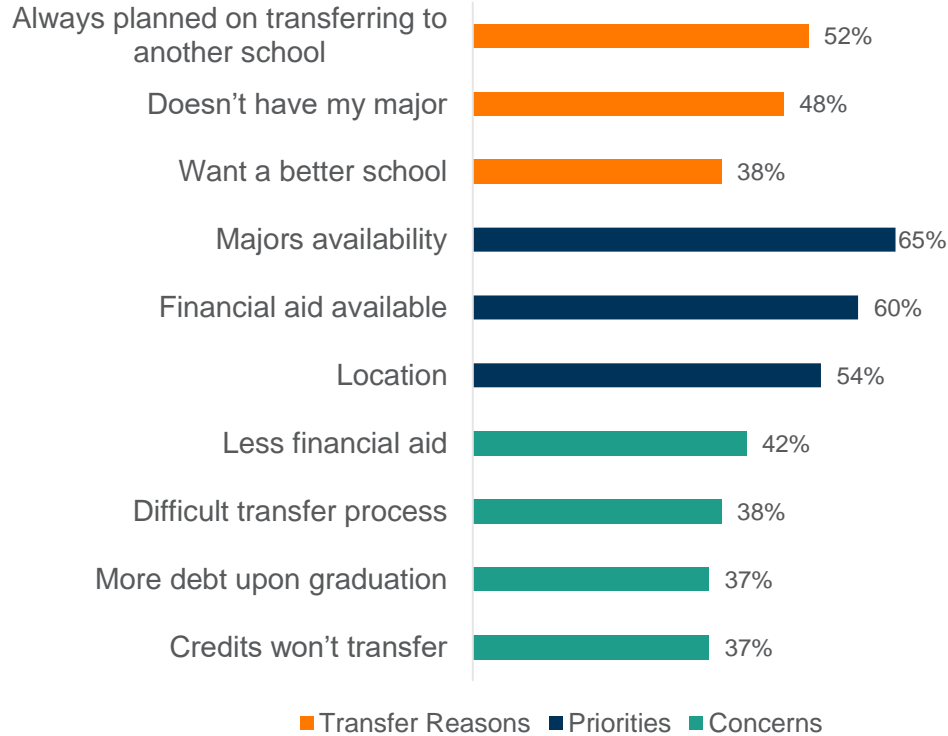
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Prospective Transfer Types



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Find My Passion



Who Are These Students?

- Average on first-generation
- More middle-income
- More mixed race
- Slightly more women
- Parents make a substantial contribution to college financing
- Average loan and scholarship expectations

Most Useful Resources in School Search

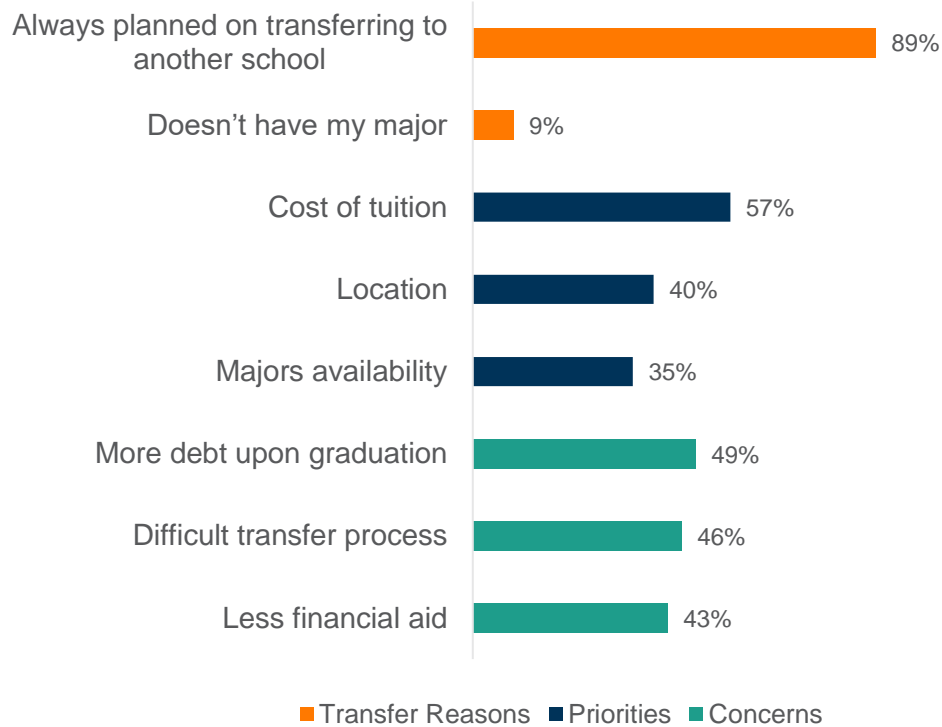
- Institutional websites
- Advisor at current school
- Online search engines
- Friends and family

Prospective Transfer Types



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Follow the Plan



Who Are These Students?

- Slightly less first-generation
- More high-income
- Average racial diversity
- Slightly more women
- Parents and students share cost of college
- More likely to rely on personal earnings and savings

Most Useful Resources in School Search

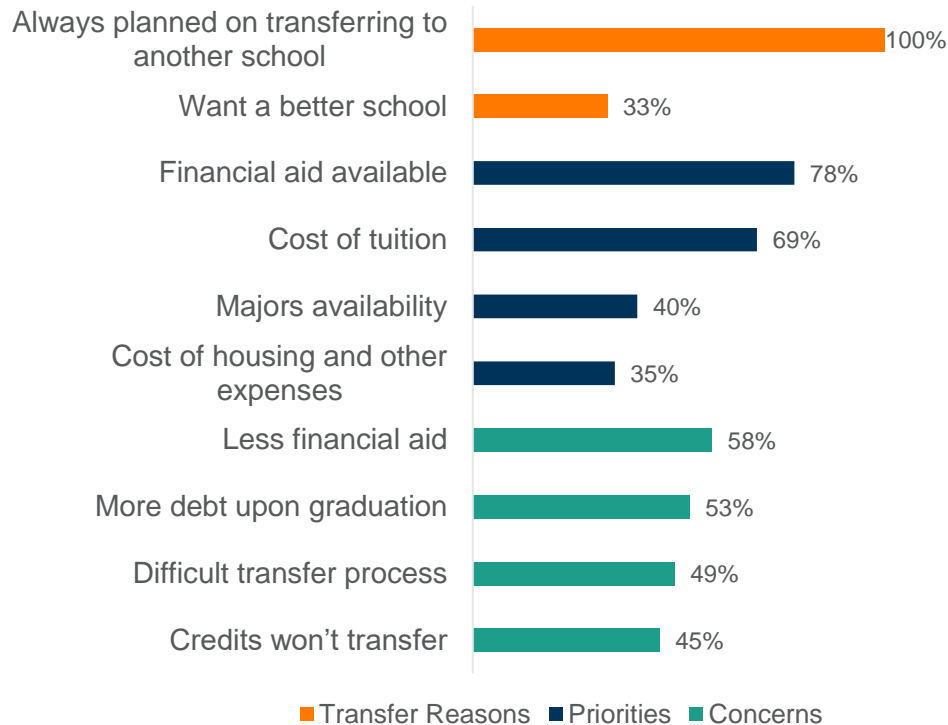
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Prospective Transfer Types



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Cost Savers



Who Are These Students?

- More first-generation
- More low-income
- Average racial diversity
- More women
- Most unsure about parent contribution to college financing
- Highest scholarship expectations, both need- and merit-based

Most Useful Resources in School Search

- Campus visits
- Online search engines
- Advisor at transfer schools
- Email from transfer schools

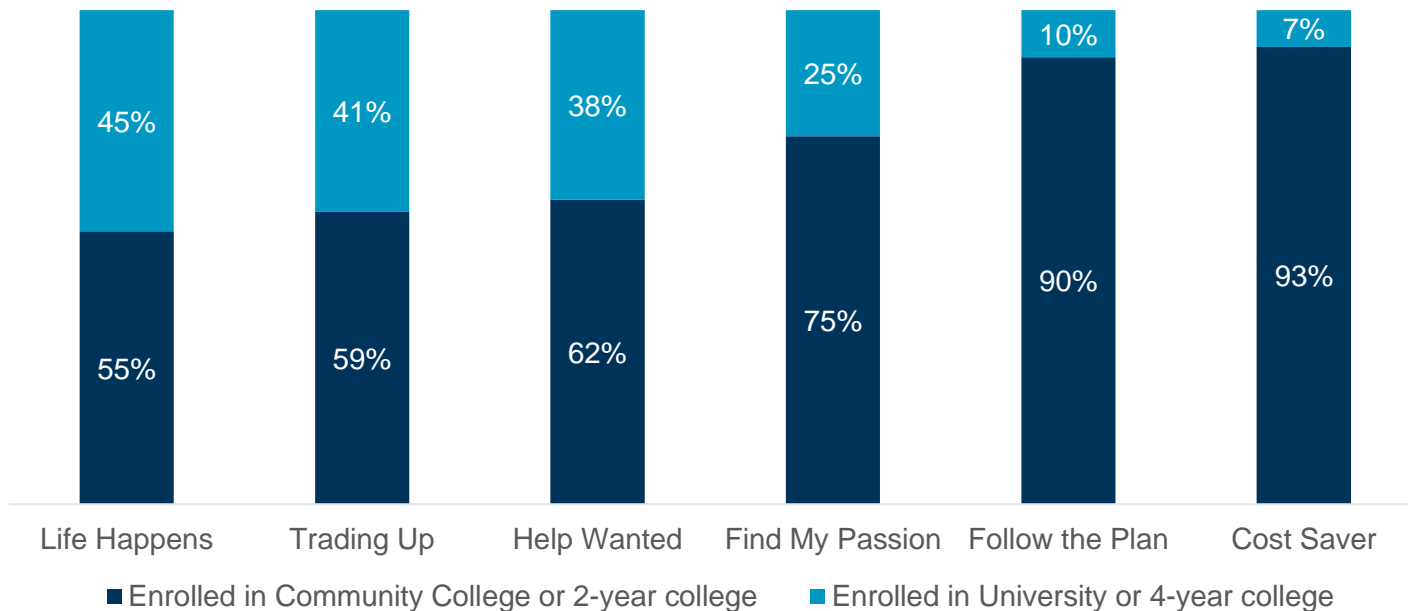
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Current Enrollment School

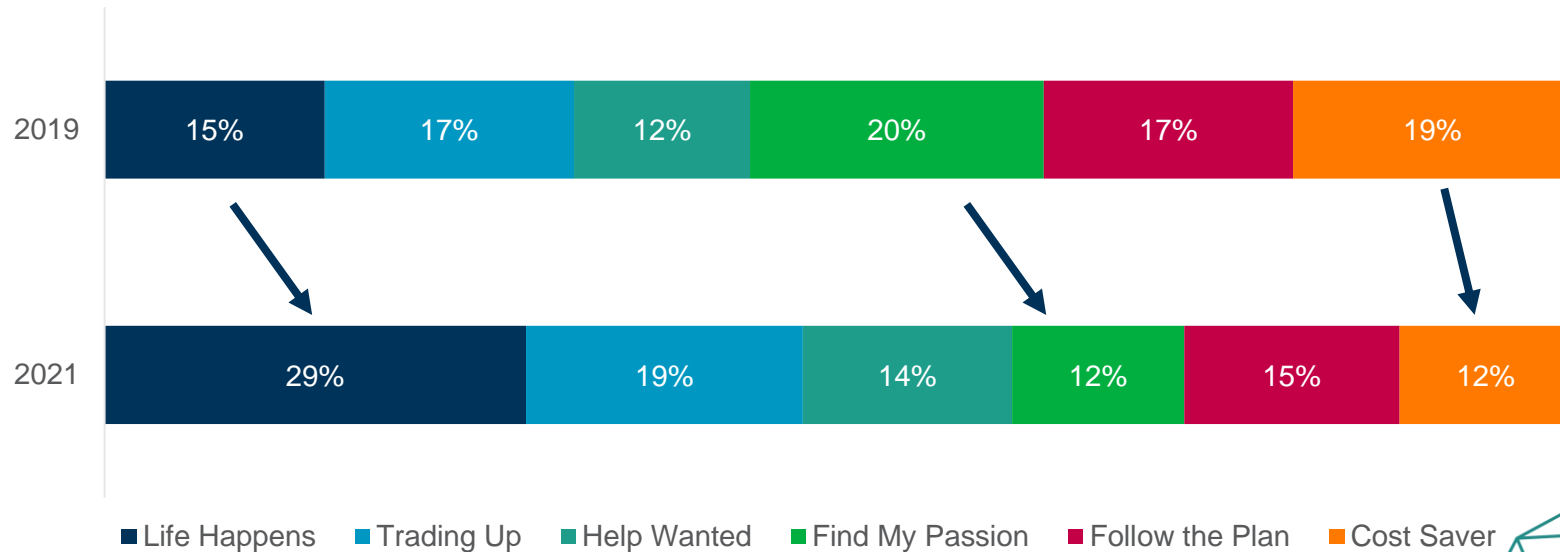
There are directional differences, but all Transfer Types are represented at all both types of feeder schools.



How the Pandemic Has Shaped Transfer Types

More circumstances, less planning affects the preparedness to prospective transfer students.

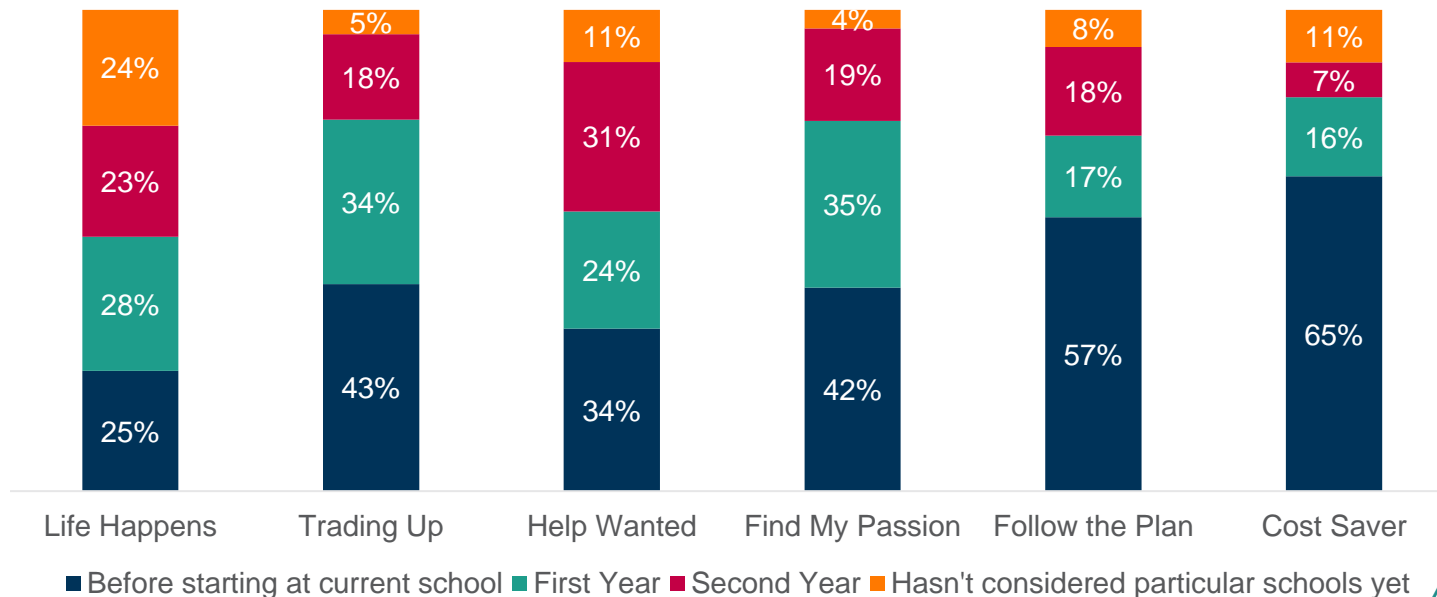
Shift in Transfer Types



When Do Transfer Types Consider Your School?

If you start transfer communication with sophomores, you might be too late for the planners.

When did you first start considering schools that you might want to transfer to?



How to Work with Transfer Types

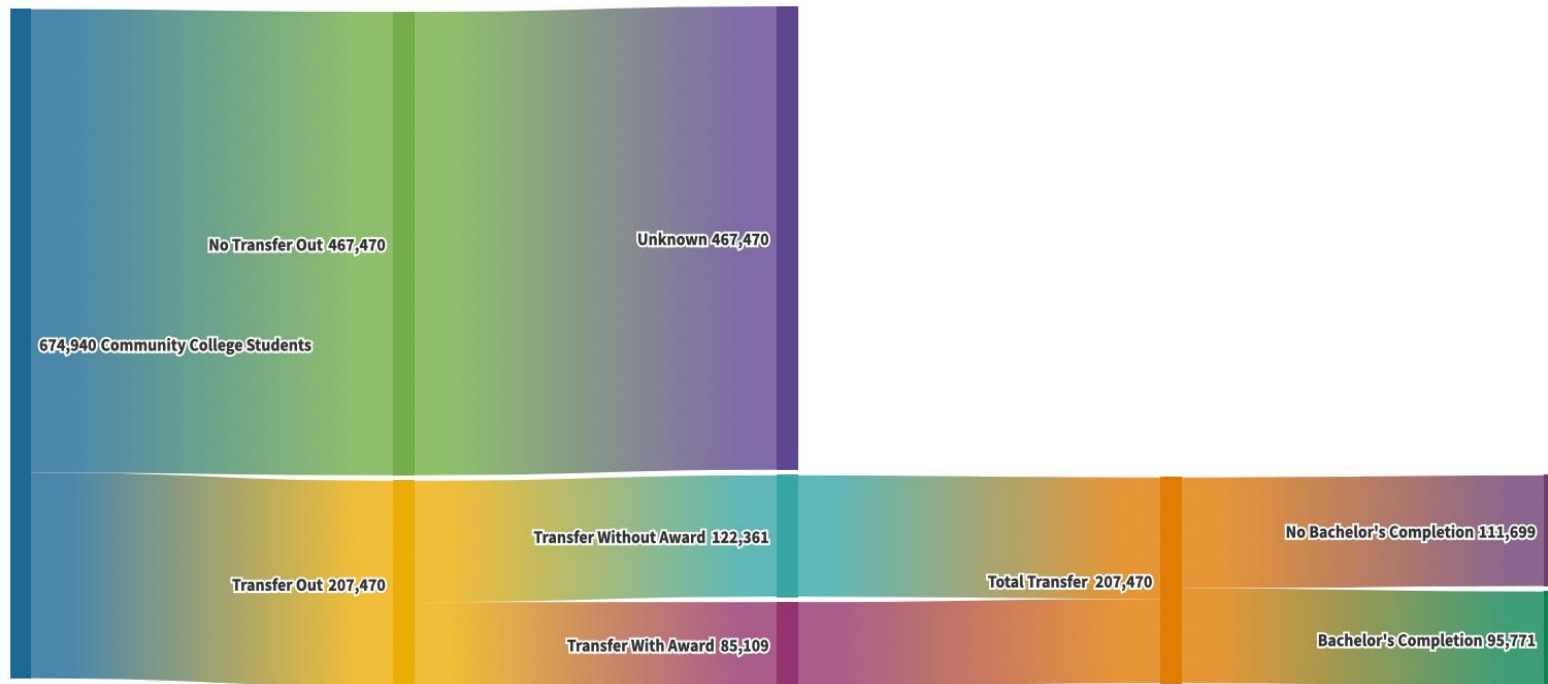
- Understand which Transfer Types your institution serves best
- Personalize your recruitment outreach
- Train your transfer recruiters
 - To identify Transfer Types
 - To address what these students need and worry about

How to Work with Transfer Types (cont.)

- Realize that currently, more students consider a transfer due to circumstances
 - They may need more guidance and support than planners
- Beyond recruitment, consider that your current students may be someone else's transfer prospects
 - They may be ambivalent about their plans
 - But they need your support to retain
- Speaking of retention, use the Transfer Types to think about how to best support your enrolled transfers

Transfer Student Plans and Degree Completion

Most 2-year students with transfer plans will not reach their goal within eight years.



Additional Resources

Participate in Prospective Student Research

Find Out What Students Think of Your Institution

Participating in Prospective Student Research provides:

- The exact words – including frequency and sentiment – that students use when thinking of your institution
- Essential focus for your team's resources and messaging
- Insight into Student Mindsets™ of your prospective students: behaviorally and attitudinally-based market segmentation of college-bound high school students

encoura.org/psr

Deadline to Participate: December 7, 2021



AACRAO

GROW YOUR ENROLLMENT.
DEVELOP YOUR CAREER.

November 14–17, 2021 ✨ **Aventura, FL** ✨ **JW Marriott Miami Turnberry Resort**



RECOMMENDED SESSION

Combating Emerging Enrollment Challenges with Encoura®

Date: Tuesday, November 16

Time: 3:30 – 4:30pm

Location: Sabal 4

COVID-19 upended all conventional wisdom around the enrollment landscape we long knew. As a result, institutions and students alike require more support than ever before. At Encoura, we've made tremendous enhancements across all of our programs so that you can better utilize the Encoura platform—higher ed's app-based technology for data science, analytics, and research—to find and engage your best fit students.



Lydenise Berdecia
Regional Director, Digital



Paul McPhee
Regional Director, Enrollment

November Transfer Student Series

Transfer Student Engagement Strategies: The Power of Video and Custom Audience Targeting

Thursday, November 18, 2021 | 2pm EST

Learn how institutions can begin using specific transfer student engagement strategies to impact their upcoming semester's transfer enrollment, covering:

- How today's prospective students say they want to hear from college according to the latest Student Sentiment Research
- Which specific audio and video digital strategies are most effective
- How to leverage the rich targeting criteria that exists on YouTube to capture more transfer prospects at the beginning of their search for a new school to call home
- How Search Keyword Retargeting can play a central role in any transfer recruitment strategy and how you can make your old data new again



Reva Levin
VP, Digital Strategy



Johanna Trovato
Eduventures Senior Analyst

encoura.org/webinars



Thank you.

ANY QUESTIONS?

Johanna Trovato

Eduventures Senior Analyst

Email: jtrovato@eduventures.com

