



Quinsigamond Community College Competitive Analysis

Quinsigamond Community College (QCC) has commissioned a competitor analysis to compare strengths and weaknesses between QCC and her main competitors: Nicholas College, Becker College, Anna Maria College, the University of Phoenix at Central Massachusetts (UP), and Worcester State College (WSC). The purpose of said comparisons is to identify potential niches that can be exploited by QCC and determine the most effective market position for the institution.

Competitor Awareness and Perception

Three of QCC's competitors were included in the recent image study conducted for the college: Worcester State College, Becker College, and the University of Phoenix. Comparisons of awareness and perception between QCC and two of these schools are highlighted here. Due to a very small number of students who were familiar with UP, however, the survey did not yield statistically significant perceived favorability results.

Academics and Tuition

The previous image study showed that Worcester State College was perceived more favorably than either Quinsigamond or Becker College. This overall rating is seen in specific attribute ratings as well, especially in academic areas.

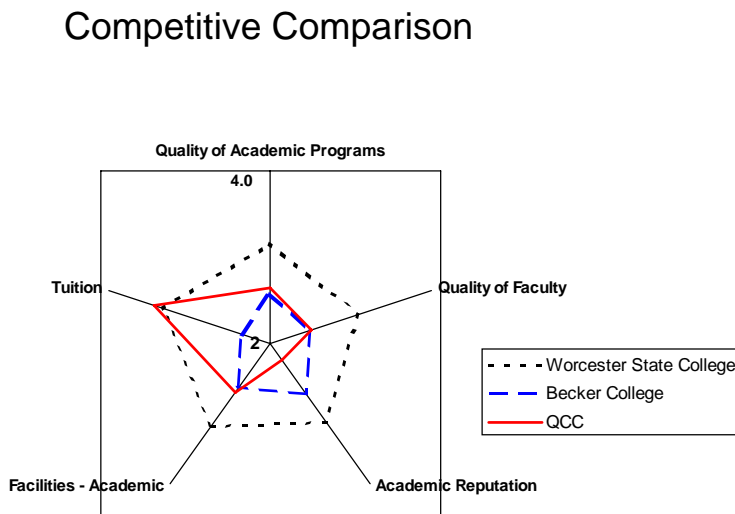
Chart 1: Academics and Tuition

	Academic Reputation	Quality of Faculty	Quality of Academic Programs	Tuition Cost	Amount and Availability of Financial Aid	Facilities - Academic	Facilities - Recreational	Campus Safety	Social Life - On Campus	Social Life - Off Campus	Job Opportunities for Graduates	Campus Location	Campus Size
QCC	3.23	3.52	3.64	4.45	4.26	3.70	3.57	4.05	3.28	3.56	3.74	3.75	3.47
Worcester State College	4.14	4.08	4.16	4.33	4.00	4.20	4.00	3.95	3.87	3.91	4.00	3.93	3.85
Becker College	3.73	3.50	3.58	3.36	3.71	3.64	3.33	3.79	3.50	3.43	3.50	3.56	3.71

Worcester State College is rated clearly superior in all academic areas. QCC and Becker College are rated similarly in most academic areas. The key exception to this is in academic reputation. While QCC’s actual academic attributes are competitive, the school’s perceived academic reputation clearly lags behind the other two. As noted in the previous study, improving QCC’s reputation should be an important element of the school’s communication strategy.

Both Worcester State and Quinsigamond are rated more favorably than Becker College on tuition cost, correctly reflecting actual tuition charges at these schools. Quinsigamond also has a slight edge on both schools in the perceived availability and amount of financial aid.

Figure 1: Academics and Tuition Comparison

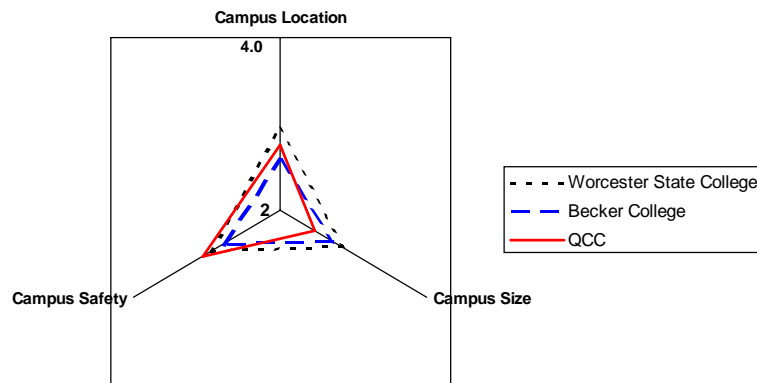


Campus Attributes

All three schools have similar ratings for campus attributes. QCC may have a slight perceived disadvantage in campus size, but a slight advantage in the area of campus safety. It is unclear whether respondents were rating Becker College's Worcester campus, Leicester campus, or both.

Figure 2: Campus Attribute Comparison

Competitive Comparison

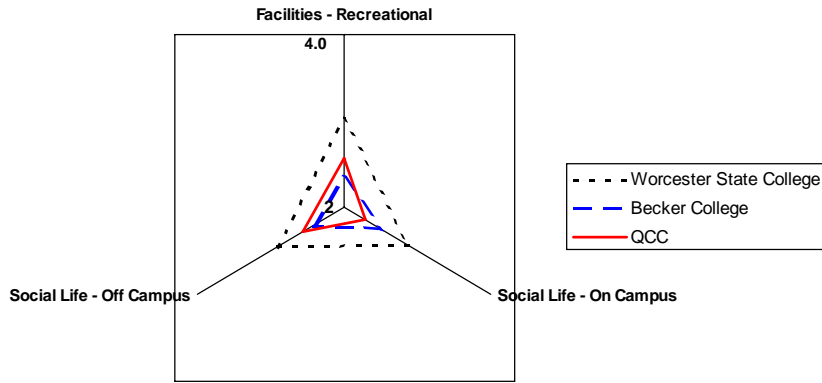


Social and Recreational Attributes

Although no school rates particularly high in social and recreational attributes, Worcester State College clearly leads QCC and Becker College. This comparison is especially inexact since QCC is strictly a commuter college. Nevertheless, QCC rates very competitively with Becker College in these social areas.

Figure 3: Social and Recreational Attributes Comparison

Competitive Comparison



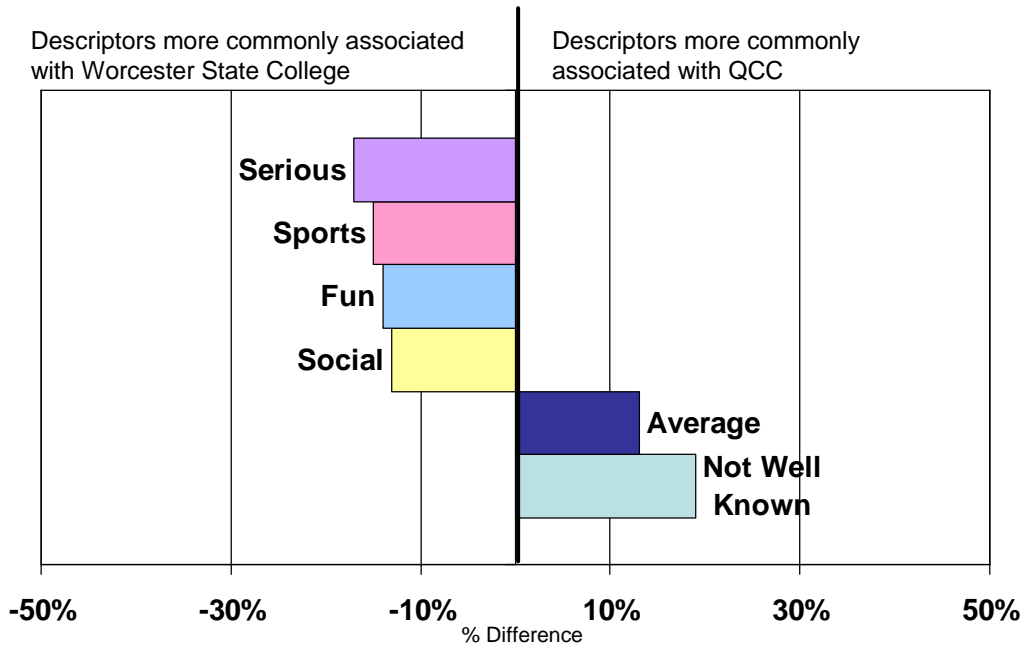
College Descriptions

High school seniors' descriptions of these three colleges provide qualitative support for the ratings. For example, Worcester State College is described nearly unanimously in positive terms. Students have favorable comments about all aspects of the college, including academics, cost, and location. Several students noted that it is one of the better state colleges in Massachusetts.

In comparison with Quinsigamond, Worcester State is viewed as both more serious and more fun. While QCC's "average" reputation in comparison with a four-year school is understandable, the perception of being "not well-known" is surprising. Respondents rated the *actual* overall awareness of Quinsigamond as very high, comparable to Worcester State. While the reason for this discrepancy is not clear, it is similar to the difference between the school's actual- and perceived academic reputation.

Chart 2: WSU vs. QCC

Image Comparison Worcester State College vs. Quinsigamond Community College



Explanation: QCC was described as Average by 40% of respondents. Worcester State was only described as Average by 27% of respondents. The difference, 13%, is shown on the chart.

Becker College and Quinsigamond both received mixed descriptions from students, including positive- and negative comments. Many students did comment about the small size of Becker College, primarily in a negative context.

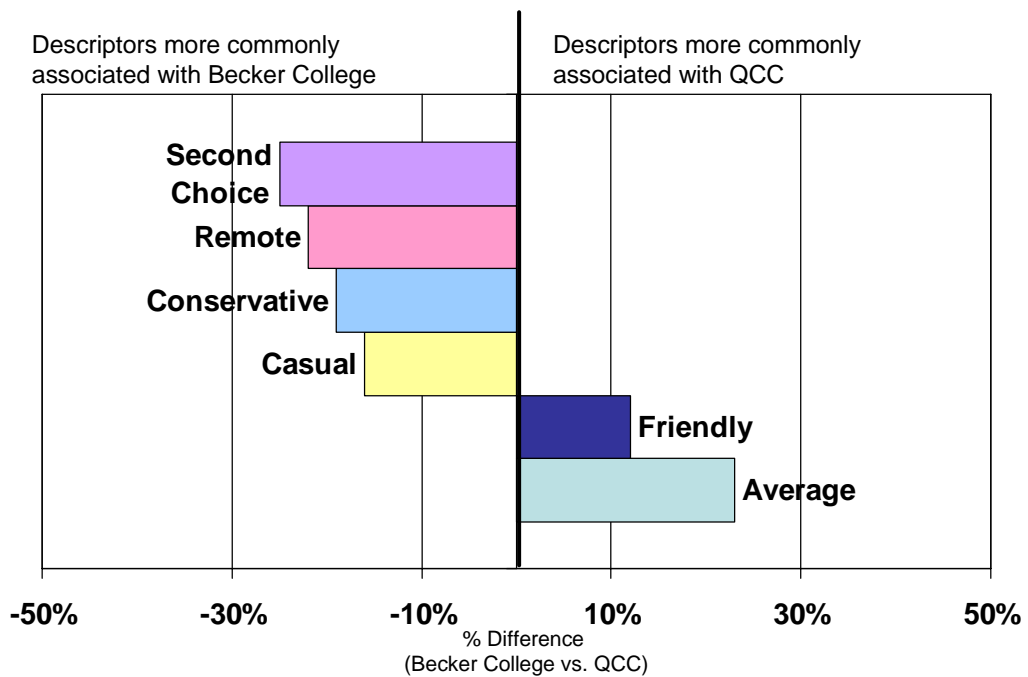
Some comparative descriptions of Becker College were surprising. While it is more frequently described as a second choice school than QCC, this likely suggests that Becker is a second choice compared to other four year institutions. The apparent “remoteness” of Becker College may be specifically related to its Leicester campus which is somewhat distant from the core

population center of Worcester and its eastern suburbs. Becker College's description as a conservative school may be related to its origins as business college.

QCC was also viewed as average in comparison to Becker College, but this may again be the result of comparing a two-year school with a four-year one.

Chart 3: Becker vs. QCC

Image Comparison Becker College vs. Quinsigamond Community College



Explanation: QCC was described as Average by 40% of respondents. Becker was only described as Average by 17% of respondents. The difference, 23%, is shown on the chart.

Descriptions

Worcester State College

How would you describe Worcester State College? 15 words or less
A college
A college that cares
A good liberal arts school.
A very strong school, one of the top state schools in MA
Affordable and a great place to potentially receive a for year degree without financial burden
Close
Close to home, Friendly college
Comfortable
DIVERSE
Excellent school
Good college for serious interest - good commercials
Good college.
Good State School
Great athletics
Growing college in central MA
It allows for a student that don't have much money to make the best of their education to what they can afford
It has a very nice suburban campus and good academic facilities with low cost
It is also a good college despite it doesn't have my major
Its a very nice campus
It's an overall amazing school
It's in an alright city there is much things to do in that area
It's very career-oriented with excellent people
Local inexpensive college with decent courses and good sports programs
Location is good, nice sports program, small and comfortable
Nice campus many jobs available
Not very good
Nursing program is one of the best programs
Offers science majors. Nice facilities
Presently very hard to get into, great reputation, and becoming a competitive school
Pretty good
Pretty, lots to do, Good for teaching, best state school in area
WSC is in a good location with small classes.

Descriptions

Becker College

How would you describe Becker College? 15 words or less
A college with a good reputation for education
A great opportunity college for students not sure what they want to pursue. Affordable and generous with scholarships and financial aid
A very good, and well put together college, that has great faculties and students. Despite the size, it is still a nice school
Becker is a small school in a strange location
I don't know anything about the school's academics
It has a lot to choose from.
It is in an environment where it feels like you're at home.
I've seen it once, and I loved the landscape. It also had nice dorms
Not that good of a college
Not very exciting
One of my college choices
Purple
Safety school
SMALL
Small and close to home
Small business college
Small, private institution

Competitor Features

The institutional features depicted in the following charts were gleaned from comparisons of Qunsigamond Community College's institutional profile data as measured against the QCC's

competitors. The institutional information for each institution was taken from institutional Web sites, IPEDS and NCES data reports. *Chart 4* compares QCC with the competitor group on factors such as costs, financial aid, enrollments, and graduation rates. *Chart 5* shows individual institutional comparisons on institutional and student attributes like type, composition of the student body, admissions selectivity, retention rates, and academic program array.

Chart 4: General Competitor Group Comparisons

Chart/Indicator	QUINSIGAMOND COMMUNITY COLLEGE	Comparison group mean (Anna Maria, Becker, Nichols, Worcester State U. of P)
Core revenues per FTE student, by revenue source: Fiscal year 2003		<u>Graph</u>
Tuition and fees	\$1,937	\$7,758
Percent distribution of scholarship and fellowship expenditures, by type of award: Fiscal year 2003		<u>Graph</u>
Institutional grants	5.6	58.1
Pell grants	58.1	21
Percent of first-time, full-time, degree/certificate-seeking undergraduate students receiving financial aid, by type of aid: Academic year 2002–03		<u>Graph</u>
Institutional grants	0	69.5

Unduplicated 12-month headcount and total FTE enrollment (academic year 2002-03) and full- and part-time fall enrollment (fall 2003)		Graph	
	Full-time enrollment	2,852	1,383
	Part-time enrollment	3,739	1,076
Percent of first-time, full- and part-time degree/certificate-seeking undergraduates returning from fall 2002 to fall 2003, and percent of the 2000 cohort who completed a degree/certificate or who transferred out		Graph	
	Full-time students returning	N/A	64.5
	Graduation rate	19.7	N/A

<i>Chart 5</i>						
Features	QCC	Becker	Anna Maria	Worcester	Nichols	U of Phoenix
UG Enrollment	2,900 FT 3,740 PT * (IPEDS 02)	1,467	731	4,665	1,327	
Type	2-year Public	4-year Private	Private, Roman Catholic	4-year Public	Private, comprehensive	Private Bachelor's Master's Doctoral
Founded	1963	1784	1946	1874	1815	1976
Setting	Urban	Urban 100 acres	Rural 180 acres	Urban 53 acres	Rural 210 acres	Online and in Various Locations
Admissions Selectivity	Open	Minimally Difficult	Moderate	Moderate	Moderate	Need HS Diploma 17 years of age Employed CLEP, AP other ways of receiving credit 2.5 at Graduate level
Mean HS GPA		2.62	2.62	2.92	2.32	
Top 10% of HS Class						
Acceptance Rate		83%	88%	56%	83%	
Yield Rate (Accept to Enroll)		33%	32%	38%	30%	
Application Deadline			rolling	8/1 6/ 1 Out of state	Rolling	
1 st -Year Retention		61%	69%	72%	76%	
6-Year Graduation Rate	19.5%					
2004-05 Tuition Cost		\$17,200	\$17,495	\$7,050	\$19,233	
Avg. Aid Package	58% Pell Recipients No institutional grants	\$9,298	\$14,955	\$6,868	\$13,893	60% of students receive tuition reimbursement per website
Transfer Students		10%	2%	8%	4%	
Students 25 or Older						Majority Enrollment
Male Students		21%	39%	40%	59%	

Domestic Minority Students			4%	10%		
International Students		0.5%	1%	3%		
Out-of-state Students		29%	22%	3%	10%	
Reside on Campus		40%	60%	15%	80%	
Part-time students		43%	25%	34%	38%	
Student/ Faculty Ratio		15:1	10:1	15:1	20:1	
Degree	Associates Applied Associates	Certificates associates bachelor's	Associates Bachelor's Master's Post-master's & post-bachelor's certificates	certificate associate bachelor's master's Postbac cert	Associate Bachelor's Master's	Bachelor's Master's (Doctoral on- line – not yet in Ctrl. MA)
Pre-art Therapy						
Pre-dentistry	X Dental Education	X				
Pre-law		X				
Pre-med		X				
Pre-pharmacy		X				

Pre-vet			X			
Accounting			X			X
Animal Science			X			
Animal training			X & Dog/Pet Animal Grooming			
Art	X Applied Graphic Arts		X Graphic Design Commercial & Adv. Art Illustration Interior Design	X		
Art Education				X		
Art Therapy				X		
Biology	X		X	X Bio Behavioral Science		
Bio-technology					X	
Business Admin.	X (2+2 or +3)		X Bus. Mgmt. & Operations Marketing	X Business Management & Operations	X	X Commerce Economics Finance
Chemistry					X	X UG Business E-Business Management Info. Technology GR Global Mgmt. Master's of Business

Communication Disorders				X	
Communication Studies	X	X		X	
Computer Sciences	X Computer Technology Computer Engineering Computer Systems Support	X	X	X	X Mgmt. Info. Systems
Criminal Justice	X (2+2)	CJ & Law Enforcement	X CJ Law enforcement	X	
Early Childhood Education	X	X	X		
Elementary Education		X	X		Secondary Education
English			X		X
Fine Arts			X		
Graphic Arts	Applied Arts	X			
Finance					X
Fire Science			X		
Health Services	Dental Education Emergency Medical Services Medical Support				

	Specialist					
	Nurse Education					
	Occupational Therapy Assistant					
	Radiologic Technology					
	Respiratory Care Surgical Technology					
History				X		X
Human Resource Mgmt.	Business (2+2 or 3)	X				X
Marketing	Business (2+2 or 3)	X				X
Mathematics					X	X
Music				X		
Music tchr. Education				X		
Music Therapy				X		
Liberal Studies	X (Numerous 2+2 or 3 options)	X		X	X	
Math Middle Grades Education					X	
Nursing	X (2+2) Nurse Education	X		X	X	
Occupational Therapy	X (2+2)** See Health Services				X	
Pastoral Ministry				X		
Philosophy				X	X	
Physical Therapy Asst.		X				
Piano/Organ		X				
Political Science/Govt. Pre-law						
Psychology	Human Services, Liberal Arts, General Studies (2+2)	X		X	X	X

Religious Studies			X			
Secondary Education		X			X	
Social Sciences	Human Services (2+2)		X	X		
Social Work			X			
Sport/Fitness		X			X	
		Kinesiology a				
Technology	Automotive Technology					
	Basic Engineering					
	Computer Information Systems					
	Electromechanical Technology					
	Electronics					
	Manufacturing Technology					
	Telecommunications Technology					
Travel/Tourism	Business & Hotel Management (2+2)	X				
Urban Affairs				X		
Veterinary/animal health/technology		X				
Voice/Opera				X		

Recommendations

As a two-year, public institution, Quinsigamond Community College's mission, student profile and academic programs set it apart from the others allowing for good market opportunity. If the variables of distinction are carefully constructed within marketing, recruitment, and admission campaigns and are deemed by the audience(s) as having significant value, QCC has great potential to claim the market niches outlined in the following recommendations.

- 1) **Programs Founded in Practical Reality:** When the mission statements for each of the institutions in Quinsigamond Community College’s comparison set are reviewed together, there is one, very clear difference making QCC a stand-out from the competitor list. Overwhelmingly, QCC’s academic intention is to prepare students for one of two ‘*next practical steps*’ leading to: a practical career or as the stepping stone to the bachelor’s degree. QCC’s program list includes areas of interest that the majority of students say they are interested in when taking the PSAT or SAT exams—health services, education, business, criminal justice, computer sciences and systems, for example.

- 2) **Price/Value Advantage:** Quinsigamond Community College has a significantly positive price position in comparison to the other institutions. If QCC’s programs can prove significant *value* to the consumer, the price advantage is one that should be at the center of any future marketing campaign. Of course, the most critical point in this campaign will be price in relation to value as measured by strong student achievement rates and employment into marketable careers and reputable agencies and/or companies. For example, Massachusetts Community College System suggests that “...A Community College education enhances lifetime earnings, with estimated annual earnings doubling, from \$21,200 to \$42,600”.....over the course of a student’s working life, the increase in earnings attributable to a Community College education is \$330,000.”¹ There is no reason QCC could not use such a strong statistic as one very critical and measurable outcome of the value of its program opportunities, or develop its own outcome statements

¹ Moskovich, Ed., Report on the ‘*Massachusetts Community Colleges: A Smart Investment*’, Cape Anne Economics.

taken from surveys of QCC graduates and employers who hire its graduates. Survey data such as these support the ‘value-added’ claims in real terms.

3) Serving Today’s Students: Like its sister institutions within the community college system, QCC serves...” an academically, economically and culturally diverse student population: The community colleges expand access to higher education by offering open enrollment, convenient locations, affordable tuition, access to financial aid and access to remedial courses...”² The institutions on the comparison list can afford to serve a modicum of students with need, but it is the community college system that prepares 43% of today’s Massachusetts students according the Moscivich Report. With nearly 60% of QCC students receiving Pell Grants (IPEDS, 2003) it is clear that QCC is fulfilling its mission as a community college serving populations other institutions are not prepared to serve. If this statistic bears out in the future, then some of the colleges on the comparison list will rely more heavily on the community college system for their students.

4) The Path to a Bachelor’s Degree: With such a rich array of institutions of higher education in the Worcester area, QCC would do well to review, update and promote its offerings of 2+2 degrees with competitor and other institutions and to consider developing richer options such as 2+3 bachelor/master’s degrees, for example. Bridge programs such as these must be transparent to the consumer making for easy understanding and allow for seamless transitions and processing. Adding strong transfer statistics up front in the college’s Web site and marketing materials (e.g., % of students

² Moskovich, Ed., *A Smart Investment*.

transferring in each program and % completing degrees at other institutions) would be valuable to students deciding between QCC programs and others.

5) Flexibility: Today's adult students need flexibility and assurance that they *can* finish their degrees in timelines that fit their schedules. The University of Phoenix's central marketing theme aims toward the heart of this customer 'need' suggesting on its Web site and in marketing materials that students complete 'one course at a time and finish their degrees in an average 2-3 years. With its supportive campus setting and environment, QCC's competitive opportunity might be to creatively redesign its programs to allow students to finish some of its programs in fewer than two years. Developing programs that offer courses in creative and flexible formats such as hybrid programming with courses offered online and on-campus; degree completion in fewer than 2 years by allowing students curricula throughout the year; weekend courses offered a few times during the term, etc.

6) Transparently Supportive Environment: Students with adult needs and constraints on their schedules desire interactive support from faculty, and staff. QCC clearly offers such an environment for all of its students, even going so far as to make *support* a central theme in marketing materials and value-added statements (see information from the college's Web site below). The support theme is an important one for QCC and stands out as value-added feature for the institution. However, it will be important to continually monitor and distinguish such features and benefits for the adult student against the

University of Phoenix. QCC might consider strengthening outcomes statements on the first few pages of the Web site and in marketing materials.

7) Distinctive Strength in the Health Services and Computer/Other Technologies:

Quinisgamond Community College's array of programming in the practical health sciences curricula is a point of strength and one that may have potential upon which to build more program and enrollment diversity. The programs in dental health education, surgical technology and nurse education, computer technologies and sciences, to name a few programs in this set, distinguish QCC from the immediate competition. Nearly two million PSAT-takers in 2003 said they were interested in enrolling in: health allied sciences, computer science/information systems and/or vocational or technological programs.³ These programs meet societal and student interest and need. Strength in these existing programs could lay the groundwork for outreach beyond the local area.

Recruitment Comparison

SEM WORKS consultants became mystery shoppers at QCC, WSC, UP Becker, Anna Maria and Nichols. On each institution's Web site, a prospective student inquiry was submitted. Initial responses as well as ongoing follow-up communications were tracked for a period of forty days. The results are described in *Chart 6*.

³ College Board, Enrollment Planning Service Data, 2003.

Chart 6: Recruitment Communications Audit

Recruitment Communications Audit

Institution	Date Requested	Date Received	Communication	Delivery Method	Personalized	Strengths and Weaknesses
QCC	6/2/2005	6/11/2005	Information folder includes: pamphlet about studies, letter of appreciation of interest, and application form	Mail	Yes	Very informative and well-presented information concerning the college; the brochure was colorful and intriguing and the information went in-depth, and gave a very good idea about majors, residential life, and other aspects of the college that the Web site alone could not have fully addressed
		7/7/05	Encouraging applying for admission and an appointment with an admissions counselor	Letter	Yes	No P.S. in letter; no application enclosed; too many "call to actions" in one letters
WSC	6/2/2005	6/11/2005	Information booklet, brochure, letter of appreciation of interest	Mail	Yes	Gave general information about the college, the brochure itself was colorful and intriguing

Institution	Date Requested	Date Received	Communication	Delivery Method	Personalized	Strengths and Weaknesses
UP	6/2/2005	6/2/2005	Pop-up notification	Internet	Yes	This was an instant gratification expression of their appreciation for my interest in the college. It was a good way to make me feel immediately connected to the process as well as the school
	6/2/2005	6/2/2005	General information call of interest	Phone	Yes	This was a personable call, and the operator seemed very open to answering questions, as well as finding out more about me. The only problem was, they scheduled another phone call and I haven't received it yet
Nichols	6/2/2005	6/2/2005	Inquiry form	Automatic message	Yes	I loved the photographs on this Web site. It made me feel as if I were a part of a big family and still had my own room to grow. I also liked how easy it was to find my way through the Web site. The one thing I did not like was the size of the font; I couldn't read it with ease
	6/2/2005	6/3/2005	Inquiry form	E-mail	Yes	Quick response to my inquiry

Institution	Date Requested	Date Received	Communication	Delivery Method	Personalized	Strengths and Weaknesses
Nichols (Cont.)		6/20/05	Information packet	Mail	Yes	The booklet that I received appeared to have come from a high-quality institution. It contained an abundant amount of pictures that made me feel like I could be accepted as an individual. There were some interesting facts about the college and some of its graduates. Overall, I loved how this booklet made me feel like I was already apart of their college and they were happy to have me
Anna Maria	6/2/2005		No response			The photographs on the Web site are mediocre, but somewhat interesting. There are not any catchy phrases
Becker	6/2/2005	6/2/2005	Inquiry form	Automatic Response	Yes	Easy to obtain information. The Web site lacks exciting colors and there aren't any interesting phrases, etc. Pictures are nice, could be a bit more detailed
		6/2/2005	Follow-up message	E-mail	Yes	Quick response to inquiry form

The University of Phoenix initially responded aggressively and personally but did not sustain the communication. Anna Maria College never responded to the request for information, and follow-

up by the other institutions, including QCC, can best be described as acceptable—presenting a competitive opportunity for QCC. A suggested inquiry follow-up strategy includes:

- Create an automated, personalized response to all online inquiries. SEM WORKS can assist with this if needed.
- Using automated workflow, send an e-mail promptly to the prospective student's admissions counselor to call. The purpose of the call is to acknowledge the student's interest in QCC, evaluate the level of interest (e.g., hot prospect, curious and wants to learn more, just shopping, not interested), and learn as much as possible about the student's areas of interest (e.g., academic major, extracurricular activities, career goals). Calls should be completed within twenty-four hours of receiving the inquiry. If necessary, outsource this function to a company like RuffaloCODY or Norton | Norris, Inc.
- Within two days of the initial inquiry, the prospective student should receive a viewbook and letter from President Kurtinitis encouraging them to visit QCC.
- One week later an admissions counselor should call the student to arrange a campus visit.
- In approximately two weeks, an HTML e-mail should be sent to all non-respondents with a link to an online campus visit reservation form.
- Non-respondents to the e-mail campaign should receive a final call (one week after the e-mail is sent) from a current QCC student inviting the prospect to attend class.
- Students who do not visit after these overtures from the university should be assigned a low priority rating and receive low cost communications such as e-mails, open house invitations, and postcards for the remainder of the recruitment cycle or until they apply

for admission. They are extremely unlikely to ever enroll at QCC, so do not waste precious resources attempting to sway them.

The recruitment activities recommended here are frontloaded on the premise that the point of initial inquiry is the best opportunity the college has to convert a “shopper” to a “campus visitor,” and QCC data reveals a strong correlation between visiting the campus and eventually matriculating as a QCC student. The colder the original inquiry gets the lower the probability the student will visit, apply, and enroll. Consequently, you are encouraged to aggressively pursue first-time inquiries that are self-initiated (e.g., submit a Web form; e-mail; call in; write in; walk in; submit a test score, transcript, or application) within the first month or so following the inquiry.

Conclusion

The most *promising niches* identified in this report are in the health services and computer/other technologies along with college transfer programs that prepare a student to complete a bachelor’s degree. Because QCC’s programs are founded in practical reality, they resonate well with career-minded students as well as potential employers and parents.

Price/Value Advantage: Serving Today’s Students: Flexibility: Transparently Supportive Environment:

In terms of *market position*, the competitor analysis suggests a competitive advantage in staking claim to being the best educational value in the Worcester area. Only the University of Phoenix can argue that they have a flexible educational model comparable to the college’s that serves a diverse population of students. The small private colleges in the area may profess to offer

ubiquitous support to students. But, none of your competitors can claim all of these student benefits at the cost that QCC can deliver them. That is real value.

Quinsigamond Community College has many strengths (e.g., a friendly campus, personal attention to students, safe environment). Nonetheless, you must address the weaknesses described in this report. The college has begun to take action based on recommendations from the first consulting report that will positively impact the enrollment yield of prospective students and over time improve retention and graduation rates. In addition to these recruitment and retention activities, you are strongly encouraged to implement the inquiry response items outlined in this report. Finally, the college's long-term success, particularly with traditional-aged students, is dependent upon addressing perception issues that are proven college selection attributes (e.g., academic quality, facilities, job opportunities for graduates). Perception can be influenced through better, more targeted marketing efforts, but some of these issues are more about reality than perception and thus, can be changed only by examining and, if necessary, reinventing the educational product and improving the campus environment.

Submitted by Dr. Jim Black
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July 14, 2005