
OCTOBER 22, 2024

**AGENDA ITEM 8
INFORMATION ITEM**

SCHOLARSHARE INVESTMENT BOARD

Marketing Update for ScholarShare 529 and the California Kids Investment Development and Savings Program

Background

TIAA-CREF Tuition Financing, Inc. (TFI), the program manager for ScholarShare 529 (Plan), has provided its “Q2 2024 Marketing Results” (Exhibit A) for the Plan and the California Kids Investment and Development Savings Program (CalKIDS or Program). This update outlines marketing results for the second quarter of 2024. The update includes results for:

- ScholarShare 529 - Achievements; business results and new accounts and contributions; e-gifting, new account growth and tactical results; creative; 529 Day promotion; public relations; social media; employer outreach; outreach events; and 2024 marketing budget.
- CalKIDS – Achievements, seniors campaign, CalKIDS stories, new Outcome Tracker user interface, social media, and 2024 marketing budget.

In addition, Gleeson Digital Strategies, the firm executing paid media efforts for CalKIDS, has provided its “CalKIDS April to June 2024 Campaign Performance” summary (Exhibit B), which provides an overview of results for the paid media campaign executed in second quarter 2024.

Presenters

Doug Harrison, Senior Director, TIAA-CREF Tuition Financing, Inc.

Yvette Haring, Director, TIAA-CREF Tuition Financing, Inc.

Carol Gleeson, President/CEO, Gleeson Digital Strategies

Otilia Bretan, Media Director, Gleeson Digital Strategies



ScholarShare 529SM

The California way to save for college

Q2 2024 Marketing Results

October 22, 2024

ScholarShare 529 2024 Marketing Plan – Q2 Achievements

	Goal	Strategy	Achievements
1	Gain New Accounts/AUM	Strategically use technology and marketing resources to grow the plan.	<p>Accounts</p> <ul style="list-style-type: none"> YTD New Accounts are down 9% versus YTD 2023 YTD New Accounts are 52% of Annual Target of 50,000 YTD Total Accounts of 439,039 are 98% of Marketing Performance Target of 447,667 <p>Contributions</p> <ul style="list-style-type: none"> YTD Contributions are up 20% versus YTD 2023 YTD Contributions of \$647 million are 53% of Marketing Performance Target of \$1.23 Billion <p>As reported at the 7/29 board meeting, this year's 529 Day Promotion yielded 2,058 New Accounts with an initial deposit of \$50+, down <0.1% vs. 2023. Account balances of \$5,381,767 were up 100%+ vs. 2023. Incentive costs were reduced by 50%.</p>
2	Increase Account Owner Diversity	Leverage targeted media and PR/media relations to increase the diversity of ScholarShare 529 account owners.	CalKIDS and multi-cultural media targeting for ScholarShare ads are having a positive effect on diversifying our account owner base.
3	Grow plan via Employers/RIAs	Continue to build relationships with employers (public and private) and registered investment advisors to attract new account owners.	Work continues to automate follow-up emails and other correspondence to prospective WPS partners via Salesforce.
4	Support tenured account owners	Continue to enhance the College Countdown program to serve the needs of mature account owners on the cusp of using their 529 savings.	College Countdown website content is regularly refreshed, and current account owners with beneficiaries age 16 and older receive a monthly email highlighting new information.

ScholarShare 529 Business Results

- YTD 2024 New Account growth is down by 9.2% versus YTD 2023 reflecting the large volume of CalKIDS mailings sent out in Q2-2023 that resulted in a spike in new accounts. We remain on-track to hit our 50,000 target for 2024.
- YTD 2024 Contributions were up 19.5% versus YTD 2023, partially related to increased consumer resources from positive stock market performance this year and easing inflation.

Accounts and Contributions	June 30, 2023	June 30, 2024	% Change
Total New Accounts Opened	28,455	25,849	-9.2%
Total New Contributions Collected ¹	\$541.1 million	\$646.7 million	19.5%
Growth Rate²	ScholarShare 529	Industry	% Difference
Annual Asset Growth Rate excluding CalKIDS/Local CSAs	13.7%	14.7%	-1.0%
Annual Asset Growth Rate including CalKIDS/Local CSAs	13.0%	14.7%	-1.7%
Rollovers	Year Ending June 30, 2023	Year Ending June 30, 2024	% Change
% of Plan Accounts Closed Due to Rollovers	0.27%	0.38%	0.11%
Accounts and Assets	June 30, 2023	June 30, 2024	% Change
Total Open Accounts	409,812	439,039	7.1%
Assets excluding CalKIDS/Local CSAs	\$12.7 billion	\$14.4 billion	13.7%
Assets including CalKIDS/Local CSAs	\$13.7 billion	\$15.6 billion	13.9%
Market Share excluding CalKIDS/Local CSAs	4.8%	4.8%	0.0%
Market Share including CalKIDS/Local CSAs	5.2%	5.1%	-0.1%

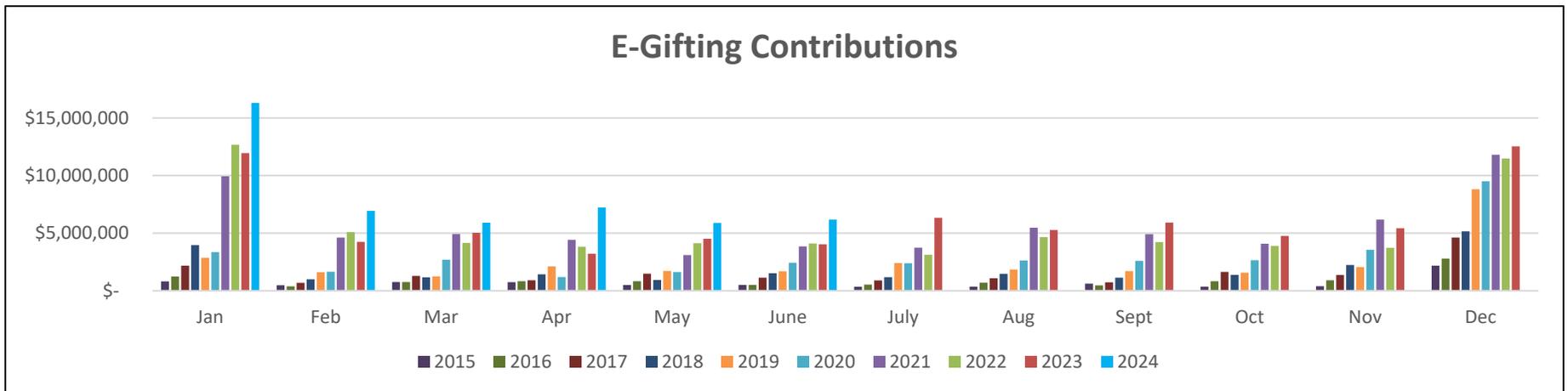
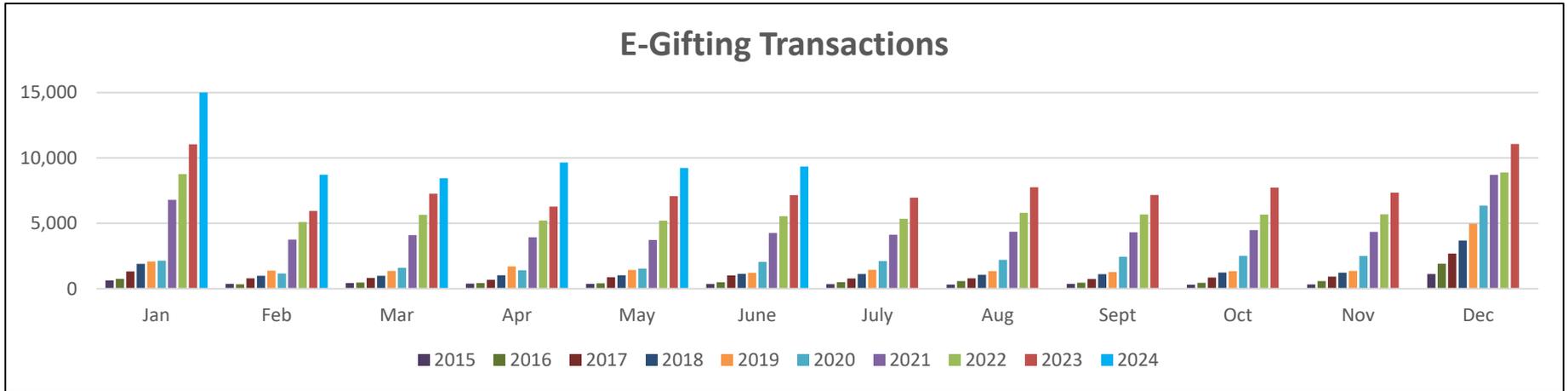
¹ Excludes CalKIDS.

² ISS Market Intelligence – Q2 2024. “Industry” represents all Direct Sold Plans.

E-Gifting: Significant Year-Over-Year Growth

- E-gifting contributions make up 7.5% of Total Contributions YTD.
- YTD 2024 Number of Payments of 60,397 up 35% over YTD 2023.
- YTD 2024 Contributions of \$48.5 million up 47% over YTD 2023.

Average Ugift Contribution: ACH	\$752.62
Average Ugift Contribution: Check	\$3,582.29



Driving New Account Growth

Audience	Objective	Tactics and Channels	Cadence
Prospect	<ul style="list-style-type: none"> • Awareness • Interest • Open new accounts 	<ul style="list-style-type: none"> • Search engine marketing • Web advertising • Email (EM) • Direct mail 	<ul style="list-style-type: none"> • Seasonal and evergreen
Inquirers	<ul style="list-style-type: none"> • Open new accounts 	<ul style="list-style-type: none"> • Search engine marketing • Web advertising • Email • Direct mail (DM) 	<ul style="list-style-type: none"> • Seasonal and evergreen
New Account Owners	<ul style="list-style-type: none"> • Fund and engage with account 	<ul style="list-style-type: none"> • Email 	<ul style="list-style-type: none"> • Evergreen
Account Owners	<ul style="list-style-type: none"> • Continued engagement and support • Fund accounts • Open additional accounts • New product engagement features 	<ul style="list-style-type: none"> • Primarily email and display • Limited direct mail • Web advertising 	<ul style="list-style-type: none"> • Seasonal and evergreen

Tactical Results Year-over-Year (YoY)

Audience	2024 Q2 Engagement and Conversion Highlights	2023 Q2 Engagement and Conversion Highlights	YoY Q2 Comparison
Prospect	<ul style="list-style-type: none"> 1,499 new prospect accounts and 895 recurring contribution sign-ups were attributed to the 2024 529 Day campaign. 	<ul style="list-style-type: none"> 1,569 new prospect accounts and 1,036 recurring contribution sign-ups were attributed to 2023 529 Day campaign. 	<ul style="list-style-type: none"> Tiered incentive offer in 2023 was more attractive to the prospect audience, though overall new accounts resulting from the 2024 campaign were equal to 2023.
Inquirers	<ul style="list-style-type: none"> 27.76 % email unique open rate. 921 messaged individuals with a 4.89% conversion rate. 	<ul style="list-style-type: none"> 25% email unique open rate. 1,246 messaged individuals with an 8.4% conversion rate. 	<ul style="list-style-type: none"> Q1 email engagement remains slightly up YoY. There was a significant decrease in the conversion rate. The Inquirer channel continues to skink as web user habits evolve.
New Account Owners	<ul style="list-style-type: none"> 38.9% email open rate. 0.7% account upsell rate with 276 new accounts and 48% RC sign-up. 	<ul style="list-style-type: none"> 36% email open rate. 0.6% account upsell rate with 233 new accounts and 50% recurring contribution sign-up. 	<ul style="list-style-type: none"> Q1 email engagement is up slightly YoY. YoY account upsell rate increased slightly, and recurring contributions decreased by 2 points. New accounts opened increased 18.5% YoY.
Account Owners	<ul style="list-style-type: none"> 2024 529 Day full campaign had a 60-day contribution rate of 60.6% and average contribution dollars of \$984 to date. 	<ul style="list-style-type: none"> 2023 529 Day full campaign had a 60-day contribution rate of 60.1% and average contribution dollars of \$809 to date. 	<ul style="list-style-type: none"> 60-day contributions remained flat YoY. The average contributions dollars increased by 21.63% YoY.

529 Day Promotion

- The 2024 529 Day campaign ran between 5/20 - 5/31.
- This year's promotion yielded 2,058 New Accounts with an initial deposit of \$50+, down <0.1% vs. 2023.
- Account balances of \$5,381,767 were up 100%+ vs. 2023.
- Incentive costs were reduced by 50% vs. 2023.

The graphic features a white background with a blue banner at the top left that reads "529 ★ DAY". Below this, a large blue box contains the text "Get \$50" in white. Underneath, an orange banner says "when you open a new", followed by another orange banner with "ScholarShare 529 account" in white. The main body of text reads: "Open a new account between May 20 and May 31, 2024, and receive an extra \$50 in your account.*" At the bottom left is the "ScholarShare 529" logo with a graduation cap icon. On the right side, there is a photograph of a woman with curly hair smiling at a young child who is lying on their stomach on a light-colored floor, playing with colorful toys. A window with a view of greenery and a string of colorful bunting are visible in the background of the photo.

Target Audiences Prospects, Inquirers, and existing AOs.

Media

- Emails
- Direct mail
- Display
- Landing page
- Home page messages

Public Relations: Q2 Recap



Media relations initiatives through our PR agency drive coverage in print, online, and in broadcast. These mentions help prospects become familiar with our brand name and brand attributes.

Category	Q1 2024	Q2 2024	Insights
Mentions among top 10 direct-sold 529 plans	ScholarShare 529 was mentioned 221 times (21%) in the media nationally reaching over 309 million readers/viewers.	ScholarShare 529 was mentioned 385 times (19%) in the media nationally reaching over 570 million readers/viewers.	Coverage of ScholarShare’s summer savings promotion and continued coverage of CalKIDS. English and Spanish media outlets are covering the brand regularly.
Competition	The most frequently mentioned plan was New Mexico’s “The Education Plan” with 425 mentions (40% of mentions), followed by ScholarShare with 221 mentions (21%) and Virginia’s Invest529 plan with 129 mentions (12%).	The most frequently mentioned plan was New Mexico’s “The Education Plan” with 672 mentions (34% of mentions), followed by Oregon College Savings Plan with 489 mentions (25%) and ScholarShare with 385 mentions (19%).	Coverage of the various college saving plans increased during the second quarter nationwide.

Public Relations: Q2 Recap



Press Releases Distributed:

- June 3 - It's Summer Savings Time at ScholarShare 529!

It's Summer Savings Time at ScholarShare 529!*

Get a \$25 bonus when you open a new ScholarShare 529 account now through Aug. 31, 2024.

June 03, 2024 01:00 PM Eastern Daylight Time

SACRAMENTO, Calif.--(BUSINESS WIRE)--Summer is a special time full of memories, fun times, and celebrations. ScholarShare 529 - California's official college savings plan - wants to help you celebrate this exciting time of year by encouraging you to get started on your family's college savings journey with a very special offer: open a new account now through Aug. 31, 2024 with an initial deposit of \$250 and get an extra \$25 in your account when you use the promotional code: Summer25. To take advantage of this offer, visit ScholarShare529.com/Summer25.

ScholarShare 529 has been helping California families save for college for more than two decades and is a tax-advantaged, flexible way to save for higher education. Withdrawals are free from state and federal taxes when used for qualified higher education expenses, such as tuition and fees, computer equipment, books, or certain room and board costs. ScholarShare 529 also provides 100% tax-deferred growth, which can mean more money for college.

Taking advantage of this special summer promotion is easy*:

1. Open a new account at ScholarShare529.com/Summer25 and deposit at least \$250.
2. Use promo code Summer25 in the Promotion Code field of the online account opening application.
3. ScholarShare 529 will add \$25 to your account on or before September 30, 2024.

Visit ScholarShare529.com/Summer25 or call 1-800-544-5248 for complete terms and conditions. Promotion ends 8/31/2024.

*Sponsored by ScholarShare 529. Offer limited to accounts opened online. The initial \$250 deposit must be received within 10 business days after the account is established. The Bonus Deposit will be made to the eligible ScholarShare 529 account on or before 8:59 PM PT on September 30, 2024. Limit: one (1) Bonus Deposit per new ScholarShare 529 account per unique accountholder/ beneficiary combination. To learn more about California's ScholarShare 529, its investment objectives, risks, charges and expenses see the Plan Description at ScholarShare529.com. Read it carefully. Investments in the Plan are neither insured nor guaranteed and there is the risk of investment loss. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, is the distributor and underwriter for ScholarShare 529. If the funds aren't used for qualified higher education expenses, a federal 10% penalty tax on earnings (as well as federal and state income taxes) may apply. Non-qualified withdrawals may also be subject to an additional 2.5% California tax on earnings.

Contacts

Media Contact:

Alma Murphy

Amurphy@Prosiopr.com

ScholarShare 529 – Q2 2024 Social Media

ScholarShare 529's Q2 social media strategy included socially relevant content like Financial Literacy Month, with a focus on account openings and gifting contributions. Highlights of the quarter included 529 Day and College Countdown content. The metrics reflect organic efforts and minimal paid social spend in May and June for the 529 Day promo, summer promo, and College Countdown. The Q2 paid social spend drove significant increases over Q1 in Reach, Impressions, Trackable Mentions, and Trackable Visits as there was no paid social media in Q1.

Total

Followers - **76,230**

Reach - **621,176**

Impressions - **3,236,187**

Trackable Mentions - **537**

Trackable Website Visits - **18,789**



Facebook (English)

- Followers - 59,688
- Reach - 543,222
- Impressions - 3,147,866
- Trackable Mentions - 311
- Trackable Website Visits - 18,102



Facebook (Spanish)

- Followers - 12,172
- Reach - 735
- Impressions - 818
- Trackable Mentions - 36
- Trackable Website Visits - 24



Twitter/X

- Followers - 2,841
- Reach - 5,663
- Impressions - 4,504
- Trackable Mentions - 51
- Trackable Website Visits - N/A



LinkedIn

- Followers - 347
- Impressions - 3,791
- Trackable Mentions - 68
- Trackable Website Visits - 110



Instagram

- Followers - 1,013
- Reach - 91,556
- Impressions - 79,208
- Trackable Mentions - 71
- Trackable Website Visits - 562



Threads* Native Analytics not available

- Followers - 169

Employer Outreach – Q2 2024

New WPS Partners:

1. Port of Oakland
2. City of Downey
3. County of Glenn
4. County of Sutter
5. Latino Community Foundation
6. Scilex Holding Company
7. People Creating Success, Inc.

Field Consultant Activity

WPS Introductory Meetings	18
WPS Employee Webinars	12
Benefits Fair	2
One-on-One Consumer Consultations	210
ScholarShare Consumer Webinars	17
ScholarShare HR Webinar	4
AUM Support Through Education	\$6,048,707

RIA Field Consultant Activity

Financial Planning Association
networking events (Orange County and
San Francisco)

4



Outreach Events Summary

SIB Staff and the TIAA Field Consultant Team attended the following events in Q2 to promote ScholarShare 529 and CalKIDS to California families.

Number of Events	Estimated Number of Attendees	List of Select Events
197	26,900	CalPERS, Cordova High School, Children's Law Center of California, Parlier High School, Grow Academy Arvin, Haven Neighborhood Services, County Records Association of California, CalWORKs Association, Orange County Department of Education, Hartnell Community Foundation, Sacramento City Unified School District, Cerritos College, California State Teacher Association, LIFT, Los Angeles Unified School District, California Department of Public Health, Baden Powell Elementary School, Umoja International Academy, Department of Transportation, Opportunity Los Angeles, Amador Child Care Council, Upland Unified School District

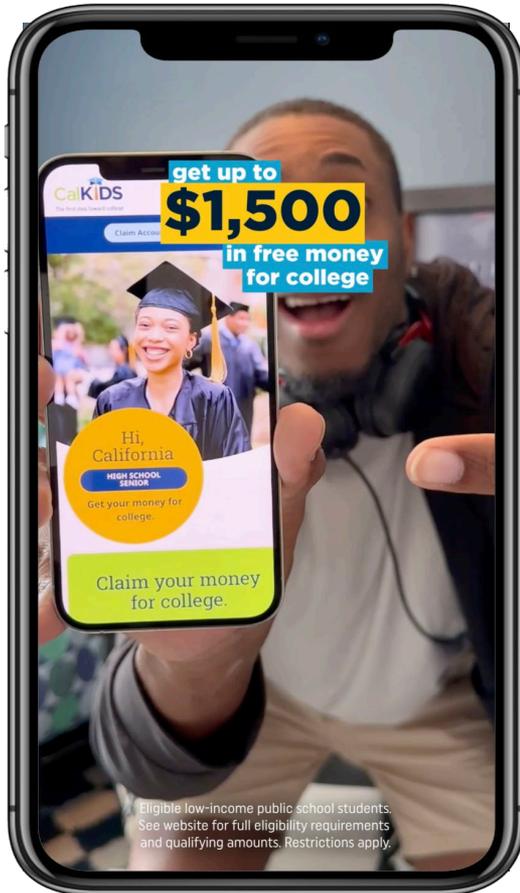
CalKIDS 2024 Marketing Plan – Q2 Achievements



	Goal	Strategy	Achievements
1	Increase CalKIDS brand awareness	Through a mix of mediums and platforms, continue to build CalKIDS brand familiarity and program trust among target audiences statewide.	<ul style="list-style-type: none"> • Deployment of Q2 High School Seniors Campaign including: Social Media video ads, Display ads, and a dedicated landing page. • PeachJar Email Newsletter to families of High School Seniors. • Identification of strategic opportunities for the Governor’s Office to drive awareness for CalKIDS i.e. GO posts. • Back to School media/creative campaign planning and creative development.
2	Increase CalKIDS program engagement and participation	Continue to implement and support direct-to-consumer methods to boost engagement and drive CalKIDS accounts claimed, linked ScholarShare 529 accounts, and distributions.	<ul style="list-style-type: none"> • Development and implementation of a segmentation strategy across 4 distinct audiences: Newborn, 2nd – 8th, High School, Higher Ed. • New High School Award Letters. • Outcome Tracker UI Optimization. • Development and implementation of new creative strategy for owned social. • Apr/May/Jun Owned Social Strategy + Content. • Developed CalKIDS Stories page for CalKIDS.org. • Call center call tracking optimization; so learnings would be more actionable in optimizing the CalKIDS experience.
3	Grow program through strategic partnerships and outreach activities	Support the State’s efforts to strengthen and expand tactical partnerships and outreach activities to gain access to additional prospective participants, drive program growth and provide legitimacy to the CalKIDS brand.	<ul style="list-style-type: none"> • Stakeholder interviews w/ partners across higher ed, high school, 1st – 8th. • Development of co-branded flyers for San Bernardino County Office of Education. • Development of “Partner Profile” content for owned social. • Development of CalKIDS Impact Report.

CalKIDS Seniors Campaign

- ✓ Campaign targeting high school seniors leverages latest social media trends and formats



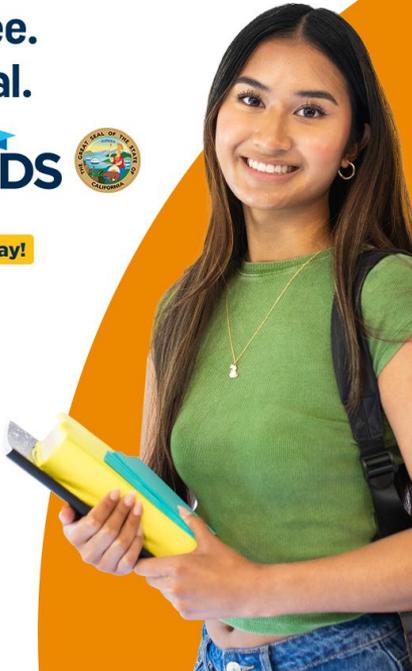
CalKIDS Seniors Campaign

Claim up to \$1,500 for college.

It's free. For real.



Claim it today!



Eligible low-income public school students. See website for full eligibility requirements and qualifying amounts. Restrictions apply.

Claim up to \$1,500 for college.

It's free. For real.



Claim it today!



Eligible low-income public school students. See website for full eligibility requirements and qualifying amounts. Restrictions apply.

Solicita hasta \$1,500 para la universidad.

Es gratis. Es en serio.



¡Solicítalo hoy!



Estudiantes de escuelas públicas de bajos ingresos que califiquen. Visita el sitio web para conocer todos los requisitos de elegibilidad y los montos elegibles. Se aplican restricciones.

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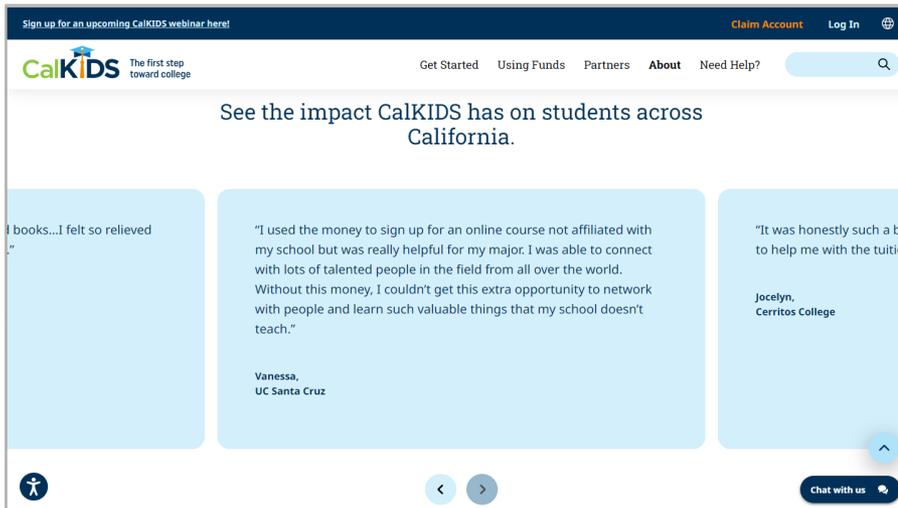


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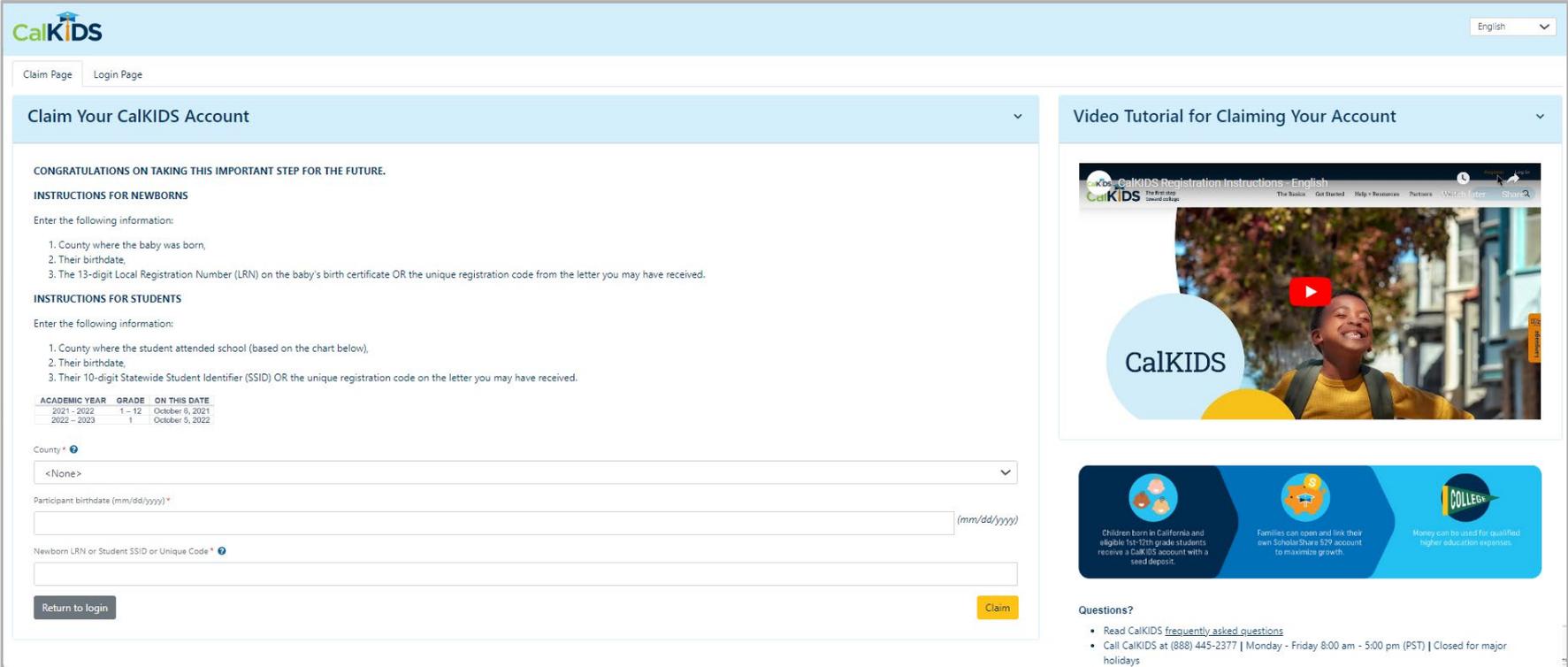
New CalKIDS.org/stories



- ✓ New section features stories from CalKIDS Alumni
- ✓ Stories highlight both rational and emotional impact of the program



New Outcome Tracker User Interface



Claim Page Login Page

Claim Your CalKIDS Account

CONGRATULATIONS ON TAKING THIS IMPORTANT STEP FOR THE FUTURE.

INSTRUCTIONS FOR NEWBORNS

Enter the following information:

1. County where the baby was born,
2. Their birthdate,
3. The 13-digit Local Registration Number (LRN) on the baby's birth certificate OR the unique registration code from the letter you may have received.

INSTRUCTIONS FOR STUDENTS

Enter the following information:

1. County where the student attended school (based on the chart below),
2. Their birthdate,
3. Their 10-digit Statewide Student Identifier (SSID) OR the unique registration code on the letter you may have received.

ACADEMIC YEAR	GRADE	ON THIS DATE
2021 - 2022	1 - 12	October 8, 2021
2022 - 2023	1	October 5, 2022

County *

<None>

Participant birthdate (mm/dd/yyyy) *

Newborn LRN or Student SSID or Unique Code *

Return to login Claim

Video Tutorial for Claiming Your Account

CalKIDS Registration Instructions - English

CalKIDS

Children born in California and eligible 1st-12th grade students receive a CalKIDS account with a seed deposit.

Families can open and link their own ScholarShare 529 account to maximize growth.

Money can be used for qualified higher education expenses.

Questions?

- Read CalKIDS [frequently asked questions](#)
- Call CalKIDS at (888) 445-2377 | Monday - Friday 8:00 am - 5:00 pm (PST) | Closed for major holidays

- ✓ Optimized for mobile
- ✓ Eliminated redundant and superfluous content

CalKIDS – Q2 2024 Social Media

In Q2 2024, we showcased our outreach efforts, partnerships, and registration milestones, alongside general program education that prioritized account claims. The paid media campaign targeting the high school segment, positively impacted organic social performance. Paid social in Q1 and Q2 increased monitored metrics significantly over quarters in 2023. In Q2 specifically, Followers increased 20% over Q1, Reach increased 67%, and Trackable Mentions increased 21%.

Total

Followers - **5,857**

Reach - **4,245,886**

Impressions - **10,790,103**

Trackable Mentions - **1,649**

Trackable Website Visits - **31,340**



Facebook (English) *Supported by Paid

- Followers - 1,053
- Reach - 1,104,298*
- Impressions - 771,471*
- Trackable Mentions - 306
- Trackable Website Visits - 27,262*



Instagram *Supported by Paid Efforts

- Followers - 3,647
- Reach - 2,928,835*
- Impressions - 10,002,072*
- Trackable Mentions - 1,221
- Trackable Website Visits - 3,947*



Twitter/X

- Followers - 144
- Reach - 102,331* Gov Tweet buzz
- Impressions - 399
- Trackable Mentions - 45
- Trackable Website Visits - N/A



Threads* Native Analytics not available

- Followers - 283
- Reach - N/A*
- Impressions - N/A
- Trackable Mentions - N/A
- Trackable Website Visits - N/A



LinkedIn

- Followers - 303
- Impressions - 4,659
- Trackable Mentions - 77
- Trackable Website Visits - 131

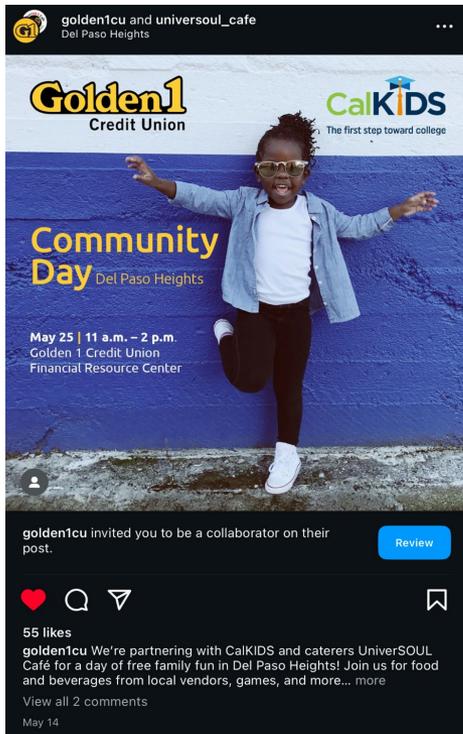


YouTube

- Subscribers - 427
- Views - 212,753
- Impressions - 11,502

CalKIDS Social Media: Mentions & Shares

CalKIDS has received mentions and shares from notable sources, including: the State Governor, California State Treasurer’s Office, Assembly Members, community organizations, family resource groups, and various school districts and Offices of Education. Some examples are the Riverside Office of Education, Val Verde Unified School District, End Poverty in California (EPIC), Golden 1 Credit Union, Excite Credit Union and Foundation, Sacramento Unified School District, and the California Student Aid Commission.





Child Care Resource Center

17,045 followers

1mo · 🌐

⋮

“What the state is saying is instead of a traditional scholarship that requires reaching certain grades or milestones, this is saying you were born in the state of California, we believe in you and want you to have opportunities to pursue higher education, which we know over time can lead to higher incomes.” Program Manager Noah Lightman shares more about the [CalKIDS Program](#) and how parents can claim their child's college savings in our latest blog.



Claim your child's college savings now -- it's free money!

ccrcca.org



Golden 1 Credit Union

16,839 followers

2mo · 🌐

⋮

We look forward to seeing you at our free Community Day event in Del Paso Heights THIS SATURDAY! Join us for food and beverages from local vendors, games, and more:

- 🎮 Interactive games for all ages
- 🎨 Face painting
- 🎈 Balloon twisting

📍 3725 Marysville Boulevard, Sacramento, CA 95838

🕒 May 25 | 11 a.m. – 2 p.m.

Brought to you in partnership with [CalKIDS Program](#) and UniverSOUL Café.

RSVP: g1cu.com/dph-community-day



CalKIDS Program and Golden 1 Credit Union are teaming up to help California children access free funds and jump start their college savings.

[#financialwellness](#) [#creditunion](#) [#college529](#)

CalKIDS Social Media: Sentiment & Observations

Positive Sentiment:

- Authentic event images and short-form content have driven higher engagement, shares, and mentions among the CalKIDS audience.
- The program is receiving numerous messages and comments from supporters.
- There has been a rise in shares and mentions from organizations, school districts, offices of education, and state leaders and officials who support the program.

Negative Sentiment:

- Some frustrations exist around the program's lack of retroactivity and children who narrowly miss the qualifying dates.
- Concerns that the seed amount is too small and insufficient compared to the overall cost of college.

Observations:

- Our audience responds best to content featuring partners, in-person events, relatable short-form content e.g. how to utilize funds in a CalKIDS account, and straightforward program explanations.
- April saw a few spikes due to posts from Governor Gavin Newsom and the Governor's Office.
- There's a consistent daily amount of shares and mentions from CalKIDS program advocates.

Appendix

2024 Marketing Budgets

Category	2024 Budget	Spending through June 30, 2024
ScholarShare 529	\$10,000,000	\$6,257,562
CalKIDS	\$1,000,000	\$356,496
CalKIDS Incentives	\$450,000	\$0
Total	\$11,450,000	\$6,614,058

ScholarShare 529:

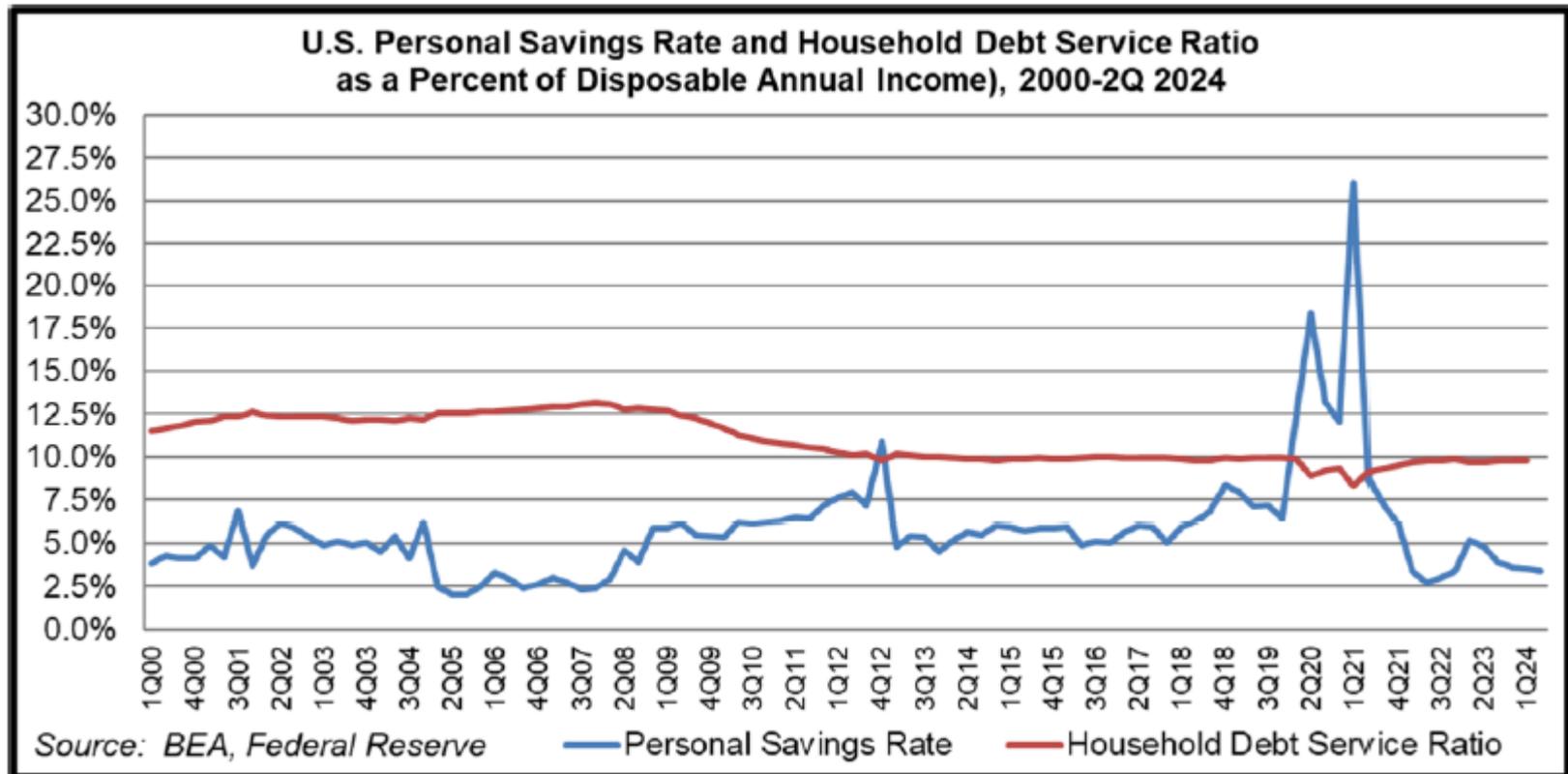
Category	Spending thru 6/30/24
Direct Marketing (DM, EM, Search, Display)	\$ 3,671,160
Mass Media/OTT	\$ 1,179,777
Agency Staff	\$ 704,255
Incentives	\$ 348,045
Public Relations	\$ 130,468
Giveaways	\$ 107,579
Fulfillment	\$ 44,636
Website	\$ 38,596
Social Media	\$ 30,255
Research	\$ 2,701
Trademark	\$ 90
TOTAL	\$ 6,257,562

CalKIDS:

Category	Spending thru 6/30/24
Agency/Staff - Creative & Project Management	\$ 305,815
Public Website Hosting	\$ 19,416
Letters to Schools	\$ 9,279
Events Supplies	\$ 8,634
Printed Collateral	\$ 6,853
Spokesperson	\$ 6,500
TOTAL	\$ 356,496

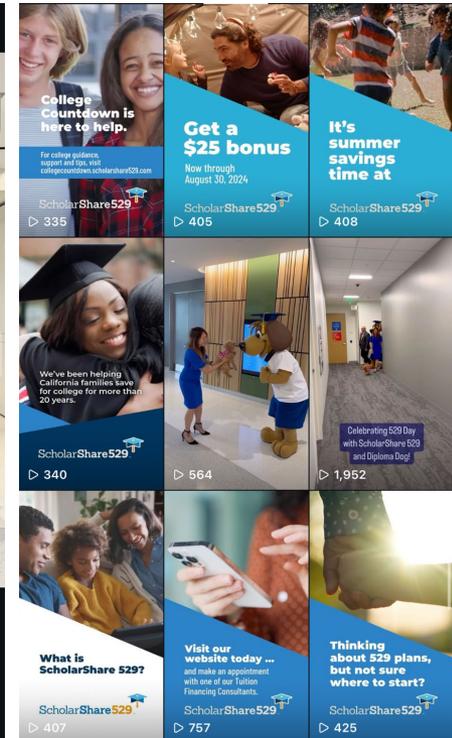
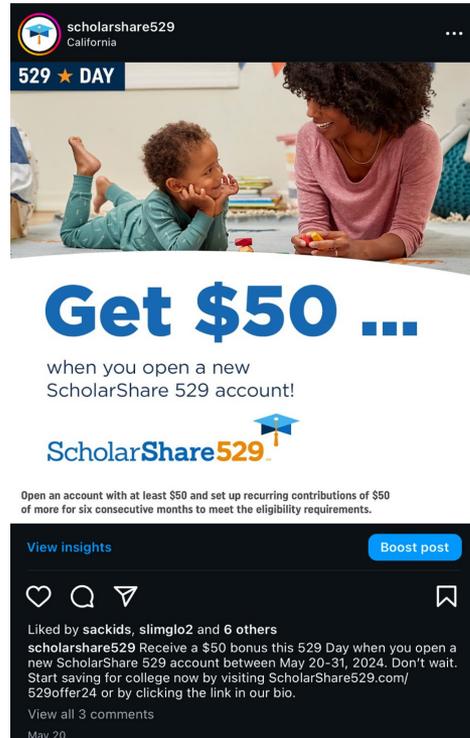
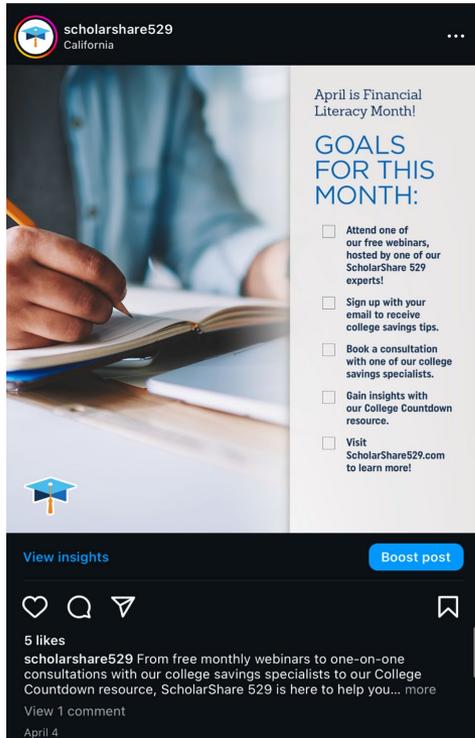
Personal Savings Rate

Current economic and world conditions continue to create hesitancy among prospects in our sales pipeline.



Source: ISS 529 Quarterly Update 2Q 2024

ScholarShare 529 Social Media: Q2 Instagram Samples



ScholarShare 529 Social Media: Q2 LinkedIn Samples

 **ScholarShare 529**
347 followers
3mo · 🌐

Not everyone's educational journeys are the same, but you need to start somewhere. Let us guide you on how you can start building your child's college savings—open a ScholarShare529 account today!



You need to start somewhere.

Open an account now at [ScholarShare529.com!](https://scholarshare529.com)



 **ScholarShare 529**
347 followers
2mo · 🌐

+ Follow ...

Today is the official National 529 College Savings Day in California! Our California State Treasurer, Fiona Ma, met at The Capitol with legislators accompanied by our very own Diploma Dog to share about and highlight ScholarShare 529's many achievements!

Fiona Ma
California State Treasurer's Office
Stephanie Tom
Mike Fong
David Alvarez
Gregory Wallis
Wendy Carrillo



 **ScholarShare 529**
347 followers
2mo · 🌐

Receive a \$50 bonus this 529 Day when you open a new ScholarShare 529 account between May 20-31, 2024. Don't wait. Start saving for college now by visiting <https://lnkd.in/ggbwmYba> or by clicking the link in our bio.



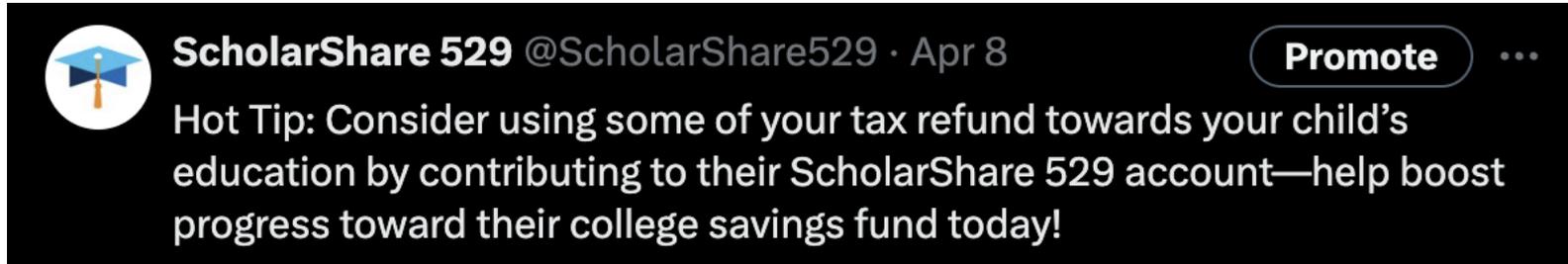
529 ★ DAY
Get \$50 ...

when you open a new ScholarShare 529 account!

ScholarShare529

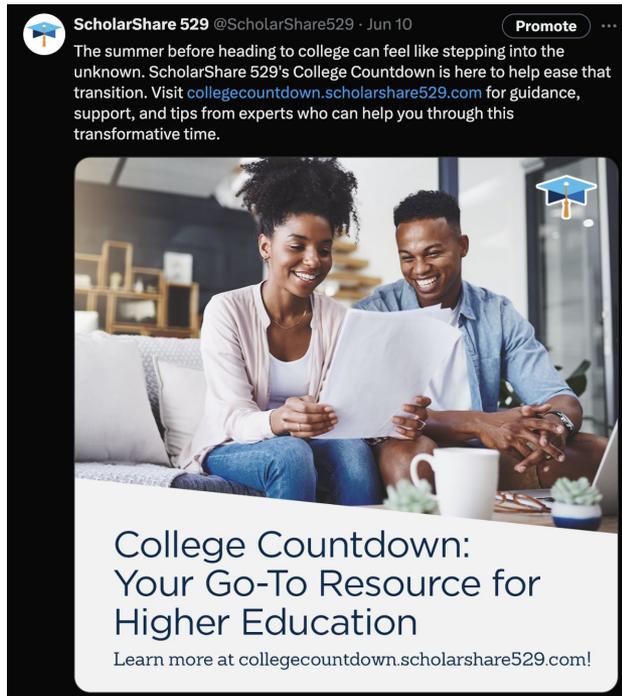
Open an account with at least \$50 and set up recurring contributions of \$50 or more for six consecutive months to meet the eligibility requirements.

ScholarShare 529 Social Media: Q2 X and Threads Samples



ScholarShare 529 @ScholarShare529 · Apr 8 Promote ...

Hot Tip: Consider using some of your tax refund towards your child's education by contributing to their ScholarShare 529 account—help boost progress toward their college savings fund today!



ScholarShare 529 @ScholarShare529 · Jun 10 Promote ...

The summer before heading to college can feel like stepping into the unknown. ScholarShare 529's College Countdown is here to help ease that transition. Visit collegecountdown.scholarshare529.com for guidance, support, and tips from experts who can help you through this transformative time.



College Countdown:
Your Go-To Resource for
Higher Education

Learn more at collegecountdown.scholarshare529.com!



You reposted

CA State Treasurer @CalTreasurer · May 29 ...

Want to know more about @ScholarShare529 ? Diploma Dog and Treasurer @fionama have your back answering the most common asked questions. Head to ScholarShare's website for even more FAQ's.



0:34

CalKIDS Social Media: Q2 Facebook Samples

CalKIDS Program is in **Los Angeles County, California.**
 Published by Instagram
 · April 1 ·

Parents: Taking your big step to kick start your child's educational future only takes a couple of small ones to claim their free funded CalKIDS account. Visit CalKIDS.org today! Your child could be eligible to receive up to \$1,500 for college that they can use toward qualified education expenses.

Tomar el gran paso de comenzar el futuro educacional de su hijo solo requiere unos pasos pequeños para solicitar su cuenta gratis de CalKIDS. ¡Visite CalKIDS.org hoy! Su hijo p... **See more**



Taking your big step only takes a couple of small ones.
 Claim their free funded CalKIDS account!

El estado de California está comprometido con el futuro de los niños de California.
 Solicite la cuenta de ahorros universitarias gratis de su hijo hoy!

CalKIDS is a program by the State of California.

CalKIDS Program is in **California.**
 Published by Instagram
 · May 13 ·

Every California child's future matters. That's why CalKIDS already created free funded college savings accounts for your baby. All California newborns can receive up to \$175 in their own college savings account. Babies born in California on or after July 1, 2022, receive an initial deposit plus additional incentives, in a CalKIDS account. Claim your baby's account now! CalKIDS eligibility and account access for newborn babies is available 90 days after the date that the baby... **See more**



Their future matters.
 Your baby already has a free funded CalKIDS college savings account.

Su futuro es importante.
 Su bebé ya tiene una cuenta de ahorros para la universidad gratis.

CalKIDS is a program by the State of California.

CalKIDS Program is in **California.**
 Published by Instagram
 · May 29 ·

529 Day is a day dedicated to highlighting the importance of saving for higher education! The State of California believes that every child deserves the opportunity to pursue their dream of higher education. That's why we've already established a free funded college savings account for them. Learn more, check your child's eligibility, and claim their account at CalKIDS.org!



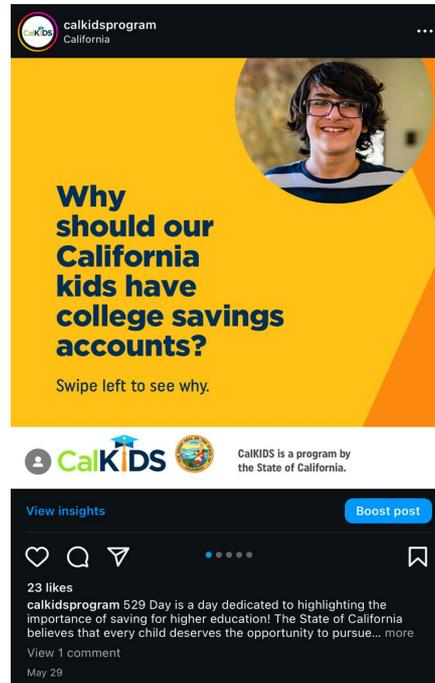
Why should our California kids have college savings accounts?
 Children with college savings accounts are **3x more likely to enroll in college** compared to those without accounts.

Children with college savings accounts demonstrate improved financial behaviors and attitudes, such as increased financial literacy and greater confidence in their ability to afford college.

Research shows that higher education can open doors to a wider range of career opportunities and professional advancement.

CalKIDS is a program by the State of California.

CalKIDS Social Media: Q2 Instagram Samples



CalKIDS Social Media: Q2 LinkedIn Samples

California State Treasurer's Office
2,832 followers
4mo · Edited · 🌐

Thank you to [First 5 California](#) for including Treasurer [Fiona Ma](#) at the Child Health, Education and Care Summit. It was honor to deliver the keynote along with esteemed Dr. [Joshua Sparrow](#). The Treasurer spoke to the audience about State Treasurer's Office's [CalKIDS Program](#) and how the educators in the room can best partner with the STO and provide continued support for this crucial savings program. On that note, thank you to [First 5 California](#)'s Executive Director [Jacqueline Wong](#), Chief Deputy Director [Dr. Angelo Williams](#), and Deputy Director [Dr. Martha Dominguez](#) for your continued partnership! And bravo to [CalKIDS Program](#)' [Noah Lightman](#) on your presentation and commitment.

Cc [Rachell Owen-Reinwald](#) + [Stephanie Tom](#)

CalKIDS Program
303 followers
3mo · 🌐

High school seniors... Did you know you could get free money to help with qualified education expenses? With CalKIDS, eligible low-income public school students can get up to \$1,500. All you have to do is claim your account at [CalKIDS.org](#)!

What's next?

Claim your free funded CalKIDS college savings account!

CalKIDS is a program by the State of California.

CalKIDS Program
303 followers
1mo · 🌐

We had a blast at the [Golden 1 Credit Union](#) community event where we were able to help families and students check their CalKIDS eligibility and claim their accounts. Thank you Golden 1 providing this opportunity for those across Sacramento!

CalKIDS Social Media: Q2 X and Thread Samples

↻ You reposted

 **California Governor** @CAgovernor · Apr 15

Claim your child's free money for college or job training.

California's @CalkidsProgram gives the next generation the tools and funds to pay for future education.

 **CalKIDS Program** @CalkidsProgram · May 21

350K accounts claimed and counting! 🎉 Now it's your turn. Keep the momentum going by claiming your eligible child's free funded CalKIDS college savings account. They could receive up to \$1,500 for college or career training. The time is now. Visit CalkIDS.org!



350K
accounts claimed!


CalKIDS is a program by the State of California.

↻ You reposted

 **CA Department of Education** @CADeptEd · May 10

#DYK the State of California has taken the first step to help fund your child's future education? Claim your free funded @CalkidsProgram college savings account now at CalkIDS.org!



California is committed to the future of California kids.

Claim your child's free funded CalKIDS college savings account today!

 
CalKIDS is a program by the State of California.

↻ You reposted

 **Edwin Gomez, Ed.D.** @RivCoSchoolSupt · May 8

Thank you @fionama, CA State Treasurer, for visiting a few of our #RivCo schools today (La Salle Elementary, Vista Heights Middle School, and Rancho Verde High School) to see how we promote the @CalkidsProgram to students & families.



Val Verde USD and 3 others



California Kids Investment and
Development Savings Program

April to June 2024 Campaign Performance

October 22nd, 2024

CalKIDS Q2/2024 Paid Media Campaign

Target Audiences:	Two separate campaigns: <ul style="list-style-type: none"> • Parents of School Age Children (Foster and Unhoused) • High School Seniors 			
Timing:	Parents:	April 1 st through May 26 th , 2024 (8 weeks)		
	HS Seniors	April 1 st through June 2 nd , 2024 (9 weeks)		
Media:	Parents:	\$42,797 Social Media - <i>Facebook/Instagram</i>		
	HS Seniors:	\$3,529 Display Banners - <i>Retargeting</i>		
		\$17,030 Audio Streaming - <i>Spotify</i>		
		\$78,374 YouTube - <i>Retargeting</i>		
		\$111,208 Video - <i>Pre-Roll, In-Content, Connected TV (CTV), OTT, Apps, Web</i>		
		\$146,030 Social Media - <i>Instagram, YouTube</i>		
Expenditure & Impressions:	Parents	\$42,797	5,446,013 impressions	Total Expenditure: \$398,970
	HS Seniors	\$356,173	25,842,483 impressions	Total Impressions: 31,288,496

CalKIDS Executive Summary

- In April 2024 CalKIDS launched a High School Seniors campaign, the first of its kind to target students directly.
- Engagement rates across all platforms confirmed strong message resonance, with Instagram emerging as the most effective channel for reaching high school seniors. However, without pixel tracking at the end of the customer journey (outcome tracker), it remains unclear if Instagram engagement directly resulted in the highest number of actions (claims). TIAA are working with their IT team to implement pixels.
- By utilizing a diverse range of digital communication platforms and tactics, we effectively reached high school seniors, leading to significant increases in claims. From a paid campaign delivery standpoint, we surpassed industry benchmarks, highlighting the success of our strategy, planning, optimizations, and high engagement rates.
- Our data segmentation strategy for the High School Seniors campaign proved highly effective. For the current Back to School “Scholarship” campaign, we plan to adopt a similar approach, using a broader creative strategy to engage both high school and higher education audiences.

CaKIDS HS Seniors Paid Media Strategy

GOAL	Increase account claim rates among high school seniors
OBJECTIVE	Increase CaKIDS brand awareness, program engagement, and participation among high school seniors
MEDIA STRATEGY	Use a combination of digital platforms that resonate with students interests, lifestyle, and college journey
TARGET AUDIENCES	High school seniors Latino, Asian, and Black & African American
TACTICS	<ul style="list-style-type: none"> - Concentrate activity in zip codes of high schools with largest number of eligible students - Execute a multi-platform digital campaign, delivering CaKIDS messaging wherever they are - Utilize popular social media platforms to increase reach and engagement - Serve messages in English and Spanish language
COMMUNICATION CHANNEL MIX	Social Media: Instagram, YouTube Video: Programmatic Audio: Programmatic Retargeting Display Banners: Programmatic
TARGETING TACTICS	Behavioral - Demographic - Predictive - Interest - In-Game Apps - Affinity - In-Market Custom Intent - Keywords - Social Retargeting (Look-a-Like, Engagers, Website Visits)
DEVICES	Mobile - Tablet - Desktop - Connected TV

CalKIDS High School Seniors – Video Messaging:



Bro English



Bro Spanish



Get Ready With Me English



Get Ready With Me Spanish



Unbox English

Note: on social media “Get Ready With Me” is referred to as “GRWM”

CalKIDS High School Seniors – Retargeting Message:

Get your free money for college.
Up to \$1,500. For real.

CalKIDS

Claim it today!

Eligible low-income public school students. See website for full eligibility requirements and qualifying amounts. Restrictions apply.

IYKYK 300x250 | Retargeting

Get your free money for college.
Up to \$1,500. For real.

CalKIDS

Claim it today!

Eligible low-income public school students. See website for full eligibility requirements and qualifying amounts. Restrictions apply.

IYKYK 160x600

Get your free money for college.
Up to \$1,500. For real. **CalKIDS** **Claim it today!**

Eligible low-income public school students. See website for full eligibility requirements and qualifying amounts. Restrictions apply.

IYKYK 728x90 | Retargeting

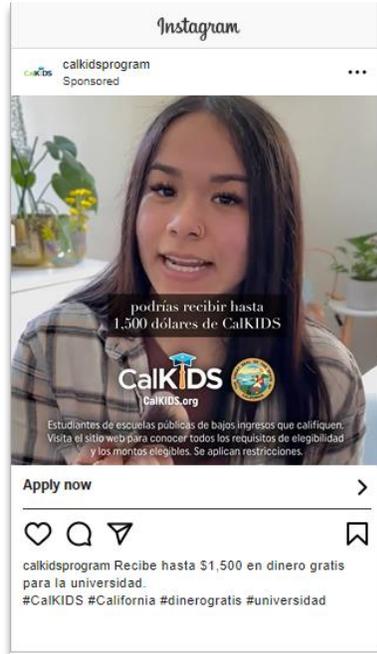
Get your free money for college.
Up to \$1,500. For real. **CalKIDS** **Claim it today!**

Eligible low-income public school students. See website for full eligibility requirements and qualifying amounts. Restrictions apply.

IYKYK 300x50 | Retargeting

NOTE: on social media “If You Know, You Know” is referred to as “IYKYK”

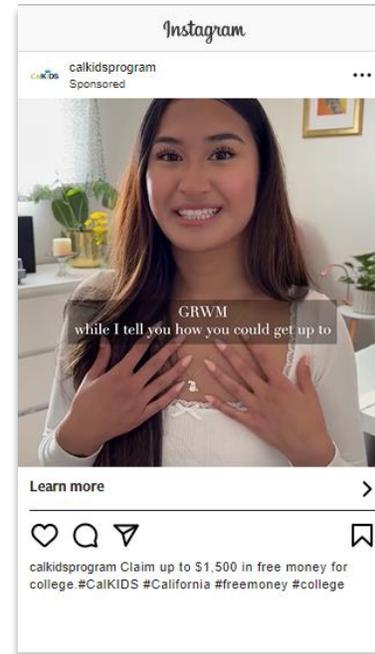
CalKIDS High School Seniors - Instagram Messaging:



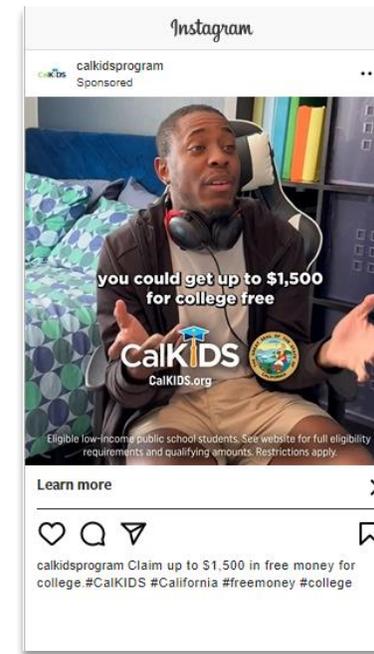
Get Ready With Me Spanish Video Ad



Bro | Spanish Video Ad



Get Ready With Me English Video Ad



Bro | English Video Ad

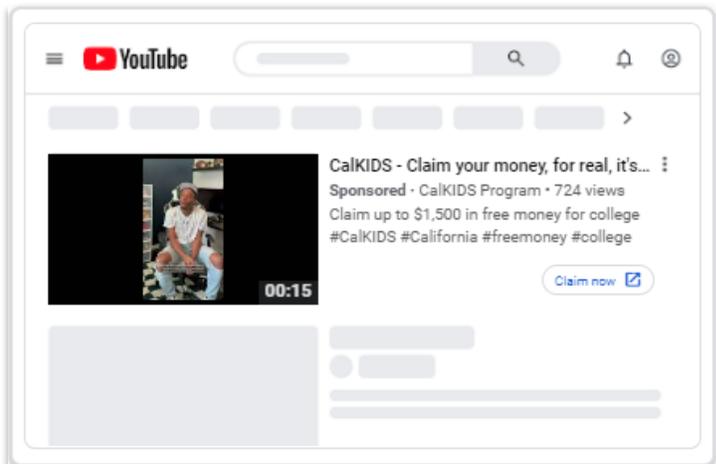


Unbox | English Video Ad

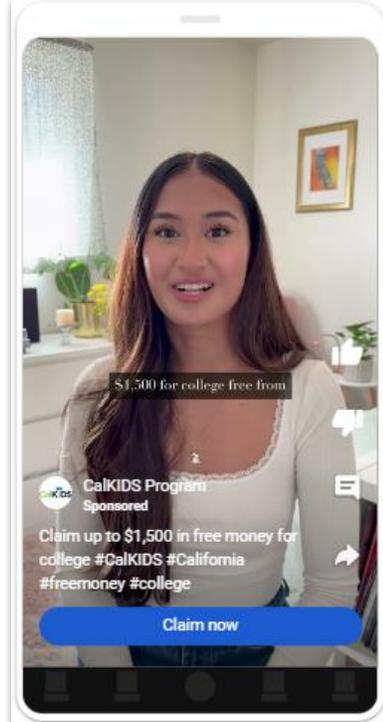
CalKIDS High School Seniors - YouTube Messaging:



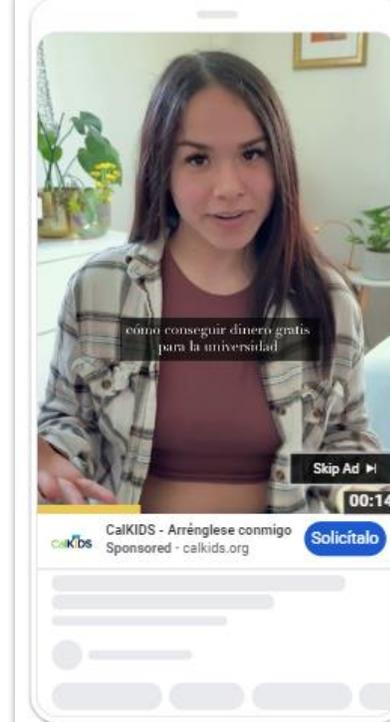
Unbox English | Skippable in-stream



Bro English | In-feed on YT search



Get Ready With Me -
Shorts mobile only



Get Ready With Me -
Spanish In-stream



Bro Spanish | In-stream

CalKIDS High School Seniors - Spotify Messaging:



Solicita hasta \$1,500 para la universidad.
CalKIDS Program

Es gratis.
Es en serio.

CalKIDS

¡Solicítalo hoy!

CalKIDS Program
Advertisement

0:00 -0:25

CalKIDS-Solicita tu dinero Ver más

y los montos elegibles. Se aplican restricciones.

Get Ready With Me - Spanish Audio Ad

Claim up to \$1,500 for college.
CalKIDS Program

It's free.
For real.

CalKIDS

Claim it today!

CalKIDS Program
Advertisement

0:00 -0:22

Claim your money Learn More

requirements and qualifying amounts. Restrictions apply.

Get Ready With Me - English Audio Ad

Solicita hasta \$1,500 para la universidad.
CalKIDS Program

Es gratis.
Es en serio.

CalKIDS

¡Solicítalo hoy!

CalKIDS Program
Advertisement

0:00 -0:25

CalKIDS-Solicita tu dinero Más información

El contenido de este mensaje puede ser objeto de derechos de autor. Visita el sitio web para conocer todos los requisitos de elegibilidad y los montos elegibles. Se aplican restricciones.

Bro Spanish Audio Ad

High School Senior Claims in Q2/24

Claimed Accounts in Q2/2024

4/1/24 – 6/30/24 compared to Q1/24 (1/1/24-3/31/24)

Program Grade	Likely Current Grade (as of Q2/24)	Eligible Students	Claimed Accounts (Q2'2024)	Percentage Claimed (Q2'2024)	Claimed Accounts (Q1'2024)	Percentage Claimed (Q1'2024)	% Change from Q1 to Q2
1	3	270,231	2,233	0.83%	16,328	6.04%	-86%
2	4	265,830	1,227	0.46%	873	0.33%	41%
3	5	275,712	1,418	0.51%	900	0.33%	58%
4	6	279,346	1,607	0.58%	1,518	0.54%	6%
5	7	282,416	1,511	0.54%	974	0.34%	55%
6	8	283,667	1,500	0.53%	954	0.34%	57%
7	9	281,033	1,698	0.60%	1,358	0.48%	25%
8	10	274,803	2,008	0.73%	1,435	0.52%	40%
9	11	284,184	2,032	0.72%	1,569	0.55%	30%
10	12	298,039	3,554	1.19%	1,810	0.61%	96%
11	College Freshman*	299,170	20,151	6.74%	7,253	2.42%	178%
12	College Sophomore	284,567	1,124	0.39%	554	0.19%	103%
	College Junior	286,609	505	0.18%	216	0.08%	134%
TOTAL:		3,665,607	40,568	1.11%	35,742	0.98%	14%

* HS Seniors last school year (Apr/May 2024)

- +178% or +12,898 more claims in Q2/24 than Q1/24
- Cost per claim for this audience is higher than current “school age” activity however, this is expected at the launch of a new audience and message

Cost Per Claim

9/18/23-12/31/23

Target Audience	Spend	Claim Acct *	Cost/Claim
Newborn	\$263,064	3,096	\$84.97
School Age	\$297,170	18,286	\$16.25
Anniversary	\$8,219	-	-
Campaign Total	\$568,454	21,382	\$26.20

1/1/24-3/31/24

Target Audience	Spend	Claim Acct	Cost/Claim
Newborn	\$182,981	21,474	\$8.52
School Age	\$204,057	35,742	\$5.71
Campaign Total	\$387,038	57,216	\$6.76

4/1/24-6/2/24

Target Audience	Spend	Claim Acct	Cost/Claim
Newborn	-	-	-
School Age	\$42,797	18,817	\$2.27
High School Seniors	\$356,173	20,151	\$17.68
Campaign Total	\$398,970	38,968	\$10.24

GRAND TOTAL

Target Audience	Spend	Claim Acct	Cost/Claim
Newborn	\$446,045	24,570	\$18.15
School Age	\$544,024	72,845	\$7.47
High School Seniors	\$743,211	77,367	\$9.61
Total	\$1,733,281	174,782	\$9.92

Note: Claims reported during the campaign period only

Claim tracking was not fully implemented for the 9/18/23 – 12/31/23 campaign

CalKIDS Q2/24 Website Traffic

CalKIDS.org Landing Page

4/1/24 to 6/30/24 (Q2 compared to Q1 -1/1/24-3/31/24)

ENGAGED USERS
669,651

+87%

NEW USERS
1,079,008

+89%

SESSIONS
1,437,554

+67%

PAGE VIEWS
4,166,657

+58%

AVERAGE USER
ENGAGEMENT TIME
1m 33s

- When compared to Q1/2024 website metrics increased significantly in Q2/2024

CalKIDS.org/Seniors Landing Page

4/1/24 to 6/30/24 *Seniors Landing Page did not exist prior to campaign launch

ENGAGED USERS
115,103

NEW USERS
220,443

SESSIONS
232,147

PAGE VIEWS
283,160

AVERAGE USER
ENGAGEMENT TIME
10 sec

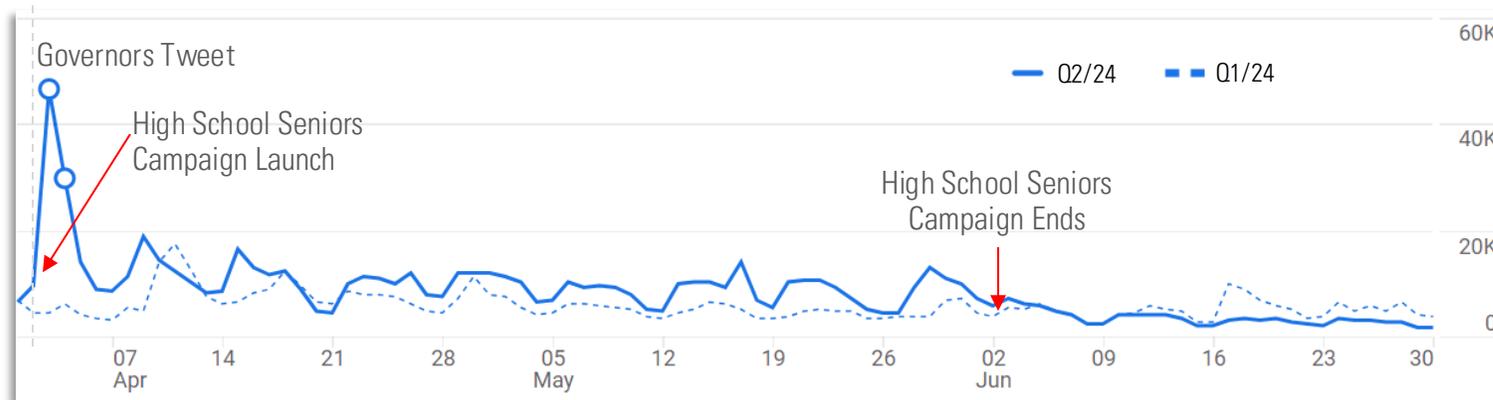
- No comparisons can be made as the "Seniors" landing page did not exist prior to the campaign launch

CalKIDS.org Q2/24 Daily Visitor Traffic

- The High School Seniors campaign increased overall CalKIDS.org traffic when compared to Q1

CalKIDS.org Landing Page Visits by Day

4/1 to 6/30 (compared to 1/1/24-3/31/24)



CalKIDS.org Q2/24 Visitor Traffic

- The “outcome tracker” referrals increased to 11,101 from 1,111 in Q1/24

Traffic Source

4/1/24 to 6/30/24

	Users	Sessions
	669,651	1,437,554
	100% of total	100% of total
1 Referral	231,318	394,834
2 Direct	212,759	480,439
3 Organic	78,979	219,742
4 Social	62,246	134,342
5 Instagram Stories	59,233	113,561
6 Instagram Feed	25,530	51,515
7 GDS Video	18,216	38,066
8 GDS Audio	2,713	4,821
9 GDS Display - Retargeting	2,235	4,598
10 Not Set	2,118	2,481
11 Organic Search	1,954	4,236

Session Source

4/1/24 to 6/30/24

Session source / medium	Users
calkids.org / referral	138,609
t.co / referral	37,772
qr1.be / referral	15,133
calkids.outcometracker.app / referral	11,101
m.facebook.com / referral	6,510
l.instagram.com / referral	3,618
lm.facebook.com / referral	1,851
classroom.google.com / referral	1,717
calmatters.org / referral	1,157
out.smores.com / referral	1,118
instagram.com / referral	1,111
cascholarshare529.com / referral	1,004
gov.ca.gov / referral	949
scholarshare529.com / referral	886
l.facebook.com / referral	704
qweb.clovisusd.k12.ca.us / referral	699
app.peachjar.com / referral	579
parentsquare.com / referral	554
mail.google.com / referral	495

- Social media was one of the largest sources of website traffic

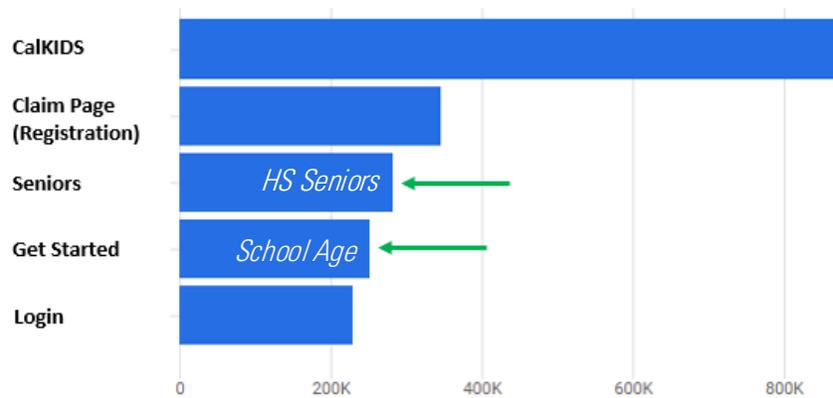
* “t.co” and “qr1.be” referral source codes should be fixed in GA4 to identify where these referrals are originating

CalKIDS.org Visitor Behavior

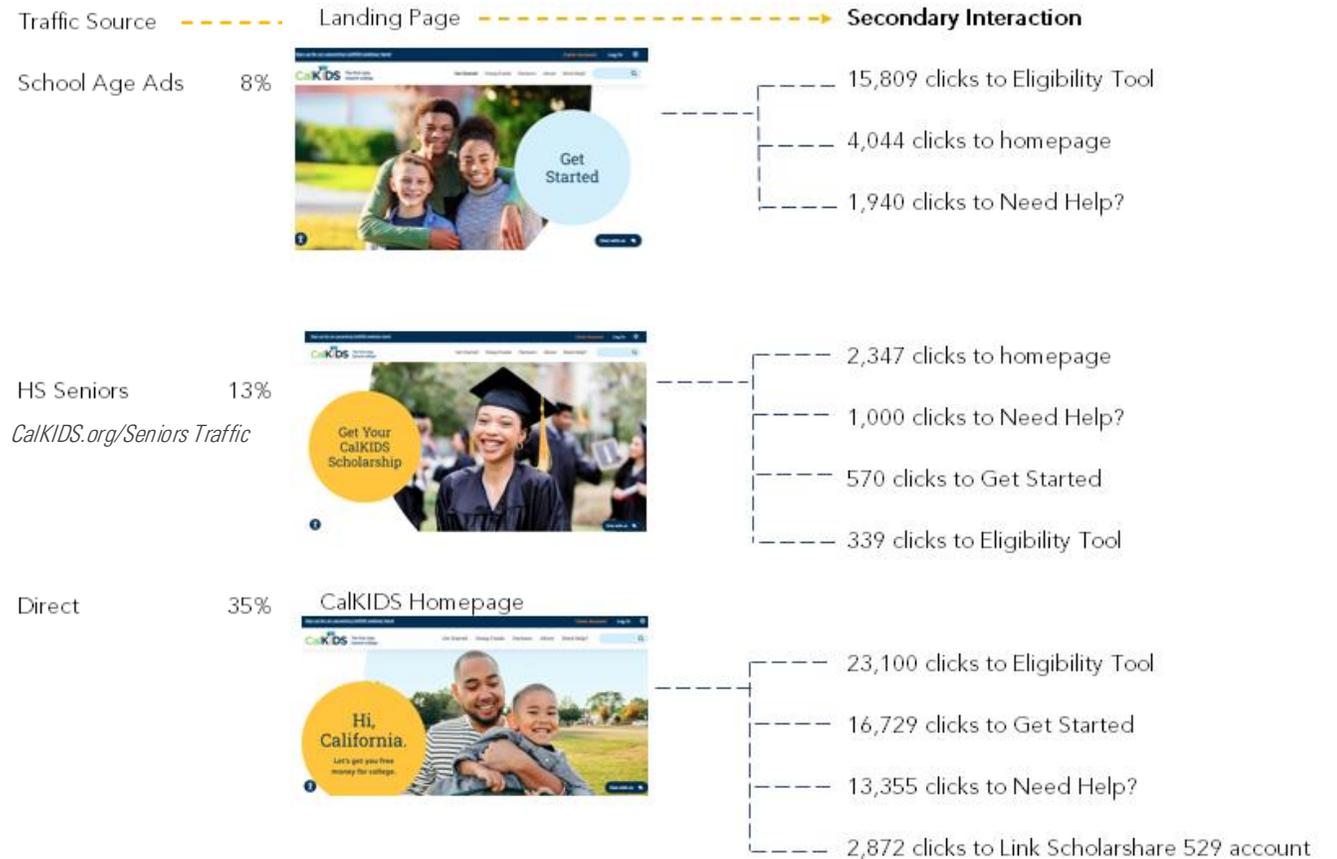
- Many of the CalKIDS.org/Seniors visitors went to the CalKIDS home page after landing on the Seniors page

Views by Page

Depending on the message, ads were directed to different landing pages



Visitor Behavior



CalKIDS.org/Seniors Visitor Traffic

- Instagram and Programmatic Video generated the most traffic to the Seniors landing page

Traffic Source - Q2

4/1 to 6/30

Session Source / Medium	Users 115,095	Sessions 232,147	Engaged Sessions 44,276
→ Social: Instagram Stories	57,122	109,042	16,445
→ Programmatic: Video	18,382	38,051	9,193
→ Social: Instagram Square	17,729	35,435	6,564
→ Social: Instagram Square	6,903	13,326	2,224
Direct	3,812	8,857	4,394
Spotify: Audio	2,714	4,819	546
Social: Instagram Stories	2,406	4,614	748
Programmatic: Retargeting	2,282	4,596	155
Organic Social	1,341	2,684	811
YouTube	1,006	1,977	196

Traffic Source - Campaign Period

4/1 to 6/2

Session Source / Medium	Users 114,246	Sessions 231,029	Engaged Sessions 43,838
1 Social: Instagram Stories	56,606	108,631	16,403
2 Programmatic: Video	18,173	37,845	9,187
3 Social: Instagram Square	17,428	35,246	6,535
4 Social: Instagram Square	6,789	13,259	2,213
5 Direct	3,606	8,493	4,211
6 Spotify: Audio	2,711	4,800	543
7 Social: Instagram Stories	2,350	4,606	748
8 Programmatic: Retargeting	2,234	4,593	155
9 YouTube	1,830	3,427	554
10 Organic Social	1,303	2,684	811

- Top Instagram ad units were "Stories" and "Squares"
- Peak visitor traffic was between 9-10pm
- Only 1,118 visits were made after the paid campaign ended on June 2nd and June 30th

CalKIDS.org/Seniors Visitor Behavior

Visitor Behavior

4/1 to 6/30

Landing Page
calkids.org/Seniors

Secondary Interaction



2,347 clicks to CalKIDS Homepage

1,000 clicks to Need help?

263 clicks to About

326 clicks to Confirm Eligibility

24 clicks to Link a 529

- Most of the people clicking ads went to the CalKIDS homepage which we anticipated to confirm the “legitimacy” of CalKIDS and the message offer

HS Seniors Campaign Delivery – Q2/2024

- Allocating 41% of the budget to Instagram resulted in significant performance increases

April 1st through June 2nd, 2024

Compared to Q1 School Age & Newborn campaign (1/1/24 – 3/31/24)



Data Source	Impressions	Clicks	CTR	Spend	CPC	CPM	Claim Acct.	Confirm Eligibility	Cost per Action	Q1/24
Facebook/Instagram - School Age	5,446,013	76,797	0.54%	\$40,384	\$0.53	\$7.42	4,331	5,519	\$4.10	\$ 19
Instagram - HS	9,349,904	71,030	0.76%	\$146,030	\$2.06	\$15.62	15,561	12,517	\$5.20	\$ 19
Programmatic Video - Spanish - HS	2,525,215	13,546	0.54%	\$41,144	\$3.04	\$16.29	241	177	\$98.43	\$345
Programmatic Video - English - HS	2,434,375	9,441	0.39%	\$47,354	\$5.02	\$19.45	210	202	\$114.94	\$345
YouTube - English - HS	4,056,908	1,617	0.04%	\$40,666	\$25.15	\$10.02	108	153	\$155.81	\$157
YouTube - Spanish - HS	3,314,197	3,315	0.10%	\$37,692	\$11.37	\$11.37	71	98	\$223.03	\$157
Programmatic Video PMPs - HS	1,171,513	369	0.03%	\$22,710	\$61.54	\$19.39	62	62	\$183.15	\$345
Programmatic Display Retargeting - HS	691,348	420	0.06%	\$3,529	\$8.40	\$5.10	42	61	\$34.26	\$185
Spotify - HS	2,299,023	4,589	0.20%	\$16,847	\$3.67	\$7.33	-	-	-	-
Total	31,288,496	181,124	0.40%	\$396,356	\$2.19	\$12.67	20,626	18,789	\$10.06	\$ 69

- Performance highlights include:
 - 86% reduction in overall cost per action
 - Higher confirm eligibility and claims

HS Seniors Campaign - Platform & Creative Performance

- Pixels need to be placed in the outcome tracker to confirm Instagrams success in delivering actions

Social

4/1/24 – 6/2/24 (9 weeks)



Instagram	Impressions	Clicks	CTR	Spend	CPC	CPM	CPCV	Confirm Eligibility	Claim Account	Cost per Action
Unbox	1,043,284	7,013	0.67%	\$19,661	\$2.80	\$18.84	\$0.61	2,390	2,725	\$3.84
→ GRWM English	2,602,959	17,542	0.67%	→ \$42,126	\$2.40	\$16.18	\$0.41	3,621	→ 4,793	\$5.01
Bro Spanish	1,483,820	14,883	1.00%	\$25,581	\$1.72	\$17.24	\$0.25	1,924	2,584	\$5.67
→ Bro English	3,986,088	28,643	0.72%	→ \$52,450	\$1.83	\$13.16	\$0.41	→ 4,223	→ 4,894	\$5.75
GRWM Spanish	233,753	2,949	1.26%	\$6,213	\$2.11	\$26.58	\$0.42	359	565	\$6.72
Total	9,349,904	71,030	0.76%	\$146,030	\$2.06	\$15.62	\$0.39	12,517	15,561	\$5.20

- While “Bro” English recorded lowest CPC, CPM, highest CTR and delivered the most actions it did so at a +50% CPA cost premium compared to “Unbox” English
- “Reels” placements and Look-a-Likes were the top performing tactics

4/1/24 – 6/2/24 (9 weeks)



YouTube	Impressions	Clicks	CTR	Spend	Views	View Rate	CPM	CPV	Confirm Eligibility	Claim Account	Cost per Action
GRWM English	578,824	306	0.05%	\$5,808	557,717	96%	\$10.03	\$0.01	35	17	\$112.06
Bro English	1,013,295	538	0.05%	\$10,164	986,168	97%	\$10.03	\$0.01	46	26	\$143.16
→ Unbox	2,464,789	773	0.03%	→ \$24,693	2,392,487	97%	\$10.02	\$0.01	→ 75	→ 63	\$179.16
Bro Spanish	1,158,677	1,465	0.13%	\$13,089	808,689	70%	\$11.30	\$0.02	39	28	\$195.60
→ GRWM Spanish	2,155,520	1,850	0.09%	→ \$24,603	2,005,525	93%	\$11.41	\$0.01	→ 59	→ 43	\$242.61
Total	7,371,105	4,932	0.07%	\$78,358	6,750,586	92%	\$10.63	\$0.01	253	176	\$182.66

- Cost per action (CPA) on YouTube is the highest of all platforms and in future would test this at a lower share of the budget

4/1/24 – 6/2/24 (9 weeks)



Spotify	Impressions	Clicks	CTR	Spend	CPC	CPM
→ GRWM A English Audio	752,504	1,806	0.24%	→ \$5,345	\$2.96	\$7.10
Bro English Audio	378,981	711	0.19%	\$2,710	\$3.81	\$7.15
→ GRWM B English Audio	528,651	1,059	0.20%	→ \$3,867	\$3.65	\$7.31
Bro Spanish Audio	349,649	566	0.16%	\$2,672	\$4.72	\$7.64
GRWM Spanish Audio	289,238	447	0.15%	\$2,253	\$5.04	\$7.79
Total	2,299,023	4,589	0.20%	\$16,847	\$3.67	\$7.33

- Spotify drove strong website traffic considering its significantly lower budget

HSS - Platform & Creative Performance

- “Bro” Spanish recorded the highest number of claimed accounts at the lowest CPA

Programmatic – ranked by action

4/1/24 – 6/2/24 (9 weeks)

VIDEO	Impressions	Clicks	CTR	Spend	VCR	CPC	CPCV	Confirm Eligibility	Claim Account	Cost per Action
Bro-Spanish	1,245,133	6,906	0.55%	\$20,260	81%	\$2.93	\$0.020	83	→127	\$96.48
GRWM-Spanish	1,280,082	6,640	0.52%	\$20,884	83%	\$3.15	\$0.020	→94	114	\$100.40
GRWM-English	1,032,378	3,597	0.35%	\$19,310	88%	\$5.37	\$0.02	78	73	\$127.88
→ Unbox	1,355,180	3,801	0.28%	→\$26,462	90%	\$6.96	\$0.022	→95	106	\$131.65
→ Bro-English	1,218,330	2,412	0.20%	→\$24,293	91%	\$10.07	\$0.022	91	93	\$132.02
Total	6,131,103	23,356	0.38%	\$111,208	87%	\$4.76	\$0.02	441	513	\$116.57

- Higher spends behind English versions of “Unbox” and “Bro” did not correlate to more actions

4/1/24 – 6/2/24 (9 weeks)

DISPLAY - Retargeting	Impressions	Clicks	CTR	Spend	CPC	CPM	Confirm Eligibility	Claim Account	Cost per Action
Mobile → IYKYK_ENG_320x50_RT	256,224	186	0.07%	→\$1,347	\$7.24	\$5.26	→28	→24	\$25.90
IYKYK_ENG_160x600_RT	14,356	2	0.01%	\$64	\$32.09	\$4.47	1	1	\$32.09
Mobile → IYKYK_ENG_300x250_RT	218,609	68	0.03%	→\$1,089	\$16.01	\$4.98	→23	7	\$36.29
IYKYK_ENG_728x90_RT	91,232	71	0.08%	\$454	\$6.39	\$4.97	4	8	\$37.81
IYKYK_ENG_300x600_RT	17,400	15	→0.09%	\$84	\$5.57	\$4.80	1	1	\$41.77
IYKYK_ENG_300x50_RT	89,765	78	→0.09%	\$474	\$6.08	\$5.28	4	1	\$94.78
IYKYK_ENG_120x600_RT	3,762	0	0.00%	\$18	-	\$4.80	0	0	-
Total	691,348	420	0.06%	\$3,529	\$8.40	\$5.10	61	42	\$34.26

- Mobile display ads drove the most actions and in turn received most of the budget
- Digging deeper into retargeting behavior we saw more people going to CalKIDS.org directly than simply clicking on the ad
 - Seen when looking at “view-thru” conversions compared to “click-thru” conversions

HS Seniors Campaign Delivery – Q2/2024

- While we can review these KPIs we don't compare Q2 to Q1 as they targeted different audiences

Campaign KPIs

Platform	KPI	Industry Goal	Q1/24	Q2/24
Display Banners	CTR	0.09%	0.12%	0.40% ↑
Programmatic Video	CPCV	\$0.02	\$0.02	\$0.02
Programmatic Audio	CPM	\$9.00	\$10.98	\$7.33 ↓
Digital Out-of-Home	CPM	\$11.42	\$10.64	-
Google AdWords	CPCV	\$4.10	\$0.85	-
	CTR	6.41%	23.80%	-
	CPA	\$62.80	\$5.71	-
Facebook/Instagram	Link Clicks (CTR)	0.90%	1.41%	0.20% ↓
	CPA	\$7.85	\$0.58	\$4.91 ↑
YouTube	AVR (100%)	35.40%	68.10%	98% ↑
	CPV	\$0.37	\$0.12	\$0.01

- Facebook/Instagram in Q2 utilized a different targeting strategy optimizing towards 'confirm eligibility' and 'claim account'
- A lower CTR and higher CPA was expected in Q2 as our strategy shifted to a smaller audience group and a more specific action

HS Seniors Campaign Added Value

- Maximizing the campaign budget by negotiating additional message exposure (impressions and lower rates) is paramount

Additional No-Charge CalKIDS Message Exposure

Media	Added Value Description	Impressions	Value
Facebook/Instagram	Lower CPM resulting in additional impressions	3,446,013	\$25,553
Video	Lower CPM resulting in additional impressions	1,330,525	\$23,411
YouTube	Lower CPM resulting in additional impressions	1,279,087	\$6,078
Audio Streaming	Lower CPM resulting in additional impressions	1,408,593	\$10,322
Display Banners	Lower CPM resulting in additional impressions	246,133	\$1,256
	Total	6,431,264	\$60,543
		+21%	+17%

- We negotiated additional no-cost message exposure valued at \$60,543 which represents another +17% of the campaign budget

Appendix

CalKIDS Parents of School Age Children



• Activity for this audience ran in April and May 2024



Facebook Stories
Spanish Video Ad



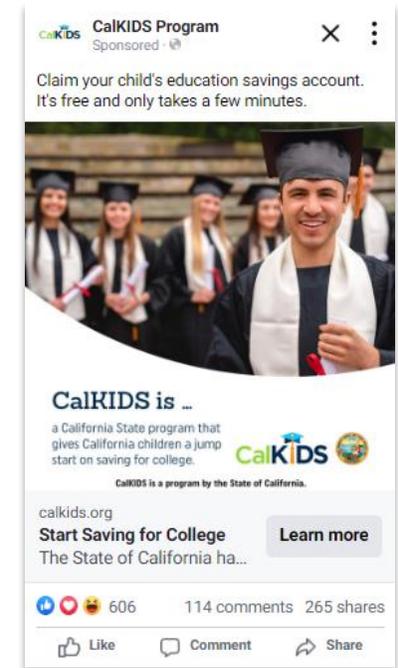
Facebook Feed
Video ad



Instagram feed
Spanish video ad



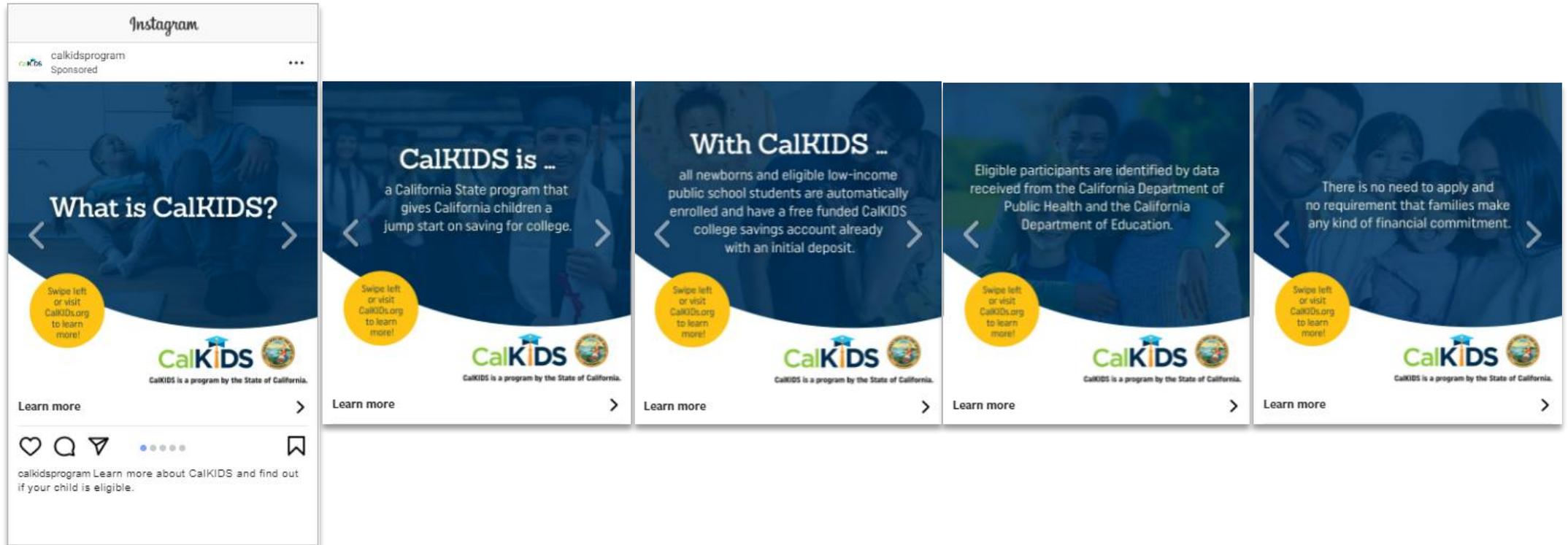
Facebook Feed
Retargeting
Image ad



Facebook Feed
Retargeting
Image Ad

CalKIDS Parents of School Age Children

- Activity for this audience ran in April and May 2024



Instagram Feed Targeting Lookalikes
Carousel ad

CalKIDS.org Q2/24 Visitor Traffic

- The most “engaged” website visitors came from smaller cities i.e., outside LA, San Diego, San Francisco, etc

CalKIDS.org Traffic – Highest Engagement



	Engaged Sessions	Engagement Rate
Reedley	1,438	62.2%
Tulare	2,337	57.1%
→ Moreno Valley	→ 8,174	56.8%
Menifee	2,299	56.6%
El Monte	2,119	56.5%
→ Perris	5,637	56.0%
Lynwood	1,500	53.5%
→ Murrieta	1,748	51.4%
San Jacinto	1,133	51.4%
Salinas	3,904	51.1%
→ Fresno	→ 17,601	49.8%
Hemet	2,671	49.6%
Redding	1,399	49.5%
Corona	1,744	49.4%
Bakersfield	6,385	49.2%
Temecula	1,332	49.2%
Friday Harbor	1,014	48.6%
Clovis	1,450	48.5%
Baldwin Park	1,128	48.4%
Hesperia	3,169	48.3%
Hawthorne	1,693	47.6%
Oceanside	2,311	47.5%
Garden Grove	1,533	47.4%
Berkeley	1,018	47.0%
Napa	1,097	46.9%

Cities with engaged session >1,000

CalKIDS Campaign Expenditure – Q2/2024

High School Seniors Campaign

Media	Apr	May	Jun	Total
Facebook/IG	\$ 60,371	\$ 80,435	\$ 5,223	\$ 146,030
YouTube	\$ 26,166	\$ 50,020	\$ 2,188	\$ 78,374
Audio Streaming	\$ 10,936	\$ 5,774	\$ 321	\$ 17,031
Display Banners	\$ 1,630	\$ 1,788	\$ 111	\$ 3,529
Video	\$ 54,778	\$ 53,794	\$ 2,636	\$ 111,208
Total	\$ 153,882	\$ 191,811	\$ 10,479	\$ 356,173

Parents of School Age Children Campaign

Media	Apr	May	Jun	Total
Facebook/IG	\$ 28,857	\$ 13,940	\$ 0	\$ 42,797

- Only two days of activity occurred in June

GA4 Terminology

Average Engagement Time

Average engagement time tells you the average amount of time people spend on your website or app. This metric is calculated by dividing the total time by the total number of users. To calculate time, a user needs to spend at least one second on a page, and Google Analytics only counts the amount of time when the browser is visible (time is not counted when the browser or tab is hidden or minimized). See also user engagement and average engagement time per session.

Average Engagement Time per Session

This metric is similar to average engagement time but based on sessions instead of users. This metric is calculated by dividing the total time by the total number of sessions. See also average engagement time.

Bounce Rate

Bounce rate is the percentage of sessions that last less than ten seconds, do not include a conversion, and/or only include one page view. In GA4 bounce rate is the percentage of sessions that are not 'engaged'. See also engaged sessions.

Direct

Direct traffic includes people who typed your website's URL into their browser or clicked a link in an email application (that didn't include campaign tags). Direct sessions will also include other cases where Google Analytics cannot identify the source of the click. Google Analytics will only assign 'direct' as a last resort. When a known source is used, that source will be attributed to the session.

Engagement Rate

The engagement rate metric is calculated by dividing the number of engaged sessions by the total number of sessions. For example, if there were 70 engaged sessions and a total of 100 sessions, then the engagement rate would be 70%. See also engaged sessions.

Engaged Sessions

Google Analytics will report an engaged session when a session lasts longer than ten seconds, when a session includes at least one conversion, or when a session includes two or more page views. You can adjust the amount of time for a session to be considered engaged. To do this, you need to open the data stream, select 'Configure Tag Settings', then 'Show All', and choose 'Adjust Session Timeout'. See also engagement rate.

Not Set

Not set can be seen in a number of different reports and indicates that a particular piece of information is not available within the report. For example, in the city report not set indicates that Google Analytics could not determine someone's exact geographic location when they accessed your website. While not set in the acquisition reports can occur when a campaign tagged URL hasn't been fully constructed (for example, if 'source' isn't defined, it will be displayed as not set within the report).

User Engagement

User engagement measures how long people have viewed your content, including pages and screens. Google Analytics calculates time using the **user_engagement** event, which is automatically collected when someone navigates to another page on your website or leaves your website. Time is only counted when the page or screen is visible. For example, when a tab is hidden, this time is not included in the user engagement metric. See also average engagement time.

UTM Tag

UTM tags are the individual query parameters used to make up a campaign-tagged URL. The UTM tags include utm_name, utm_source, utm_medium, utm_term, utm_content, and utm_id. UTM stands for 'Urchin Traffic Monitor' (Urchin was the precursor to Google Analytics). See also campaign tags.