



# The Education Research & Conversion Process, from a Search Perspective

Google/Compete  
U.S., Jan 2009

# Agenda

1 Background, Objectives and Methodology

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2 Key Findings: Search's Role for Education Marketers

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3 Key Findings: The Online Research Process for Education

# Background and Objectives

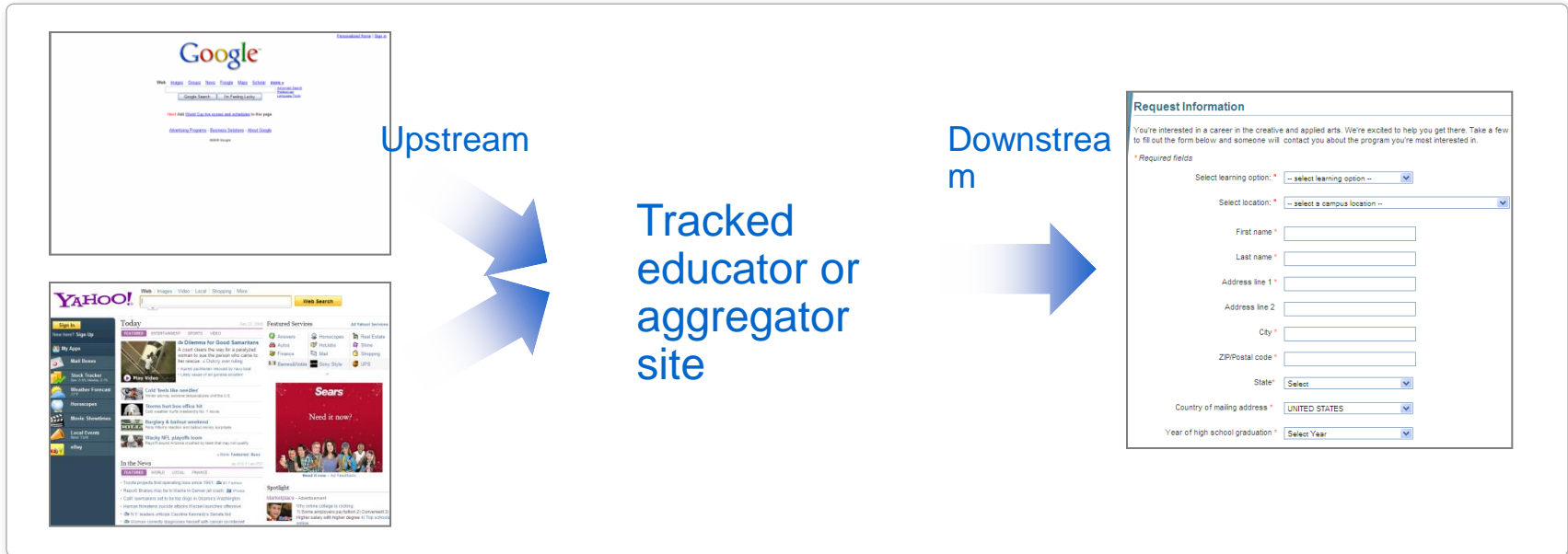
## Background

We know search works to drive conversions for post-secondary education sites, but where does it fit into the research process, and how does it compare to portals?

## Objectives

- Measure role of search, compared to portals, in driving “high quality” visits to educator and lead generation / aggregator sites
- Understand the research process followed by people who convert on educator and aggregator sites
- Track how people who convert on educator and aggregator sites used search in their research process

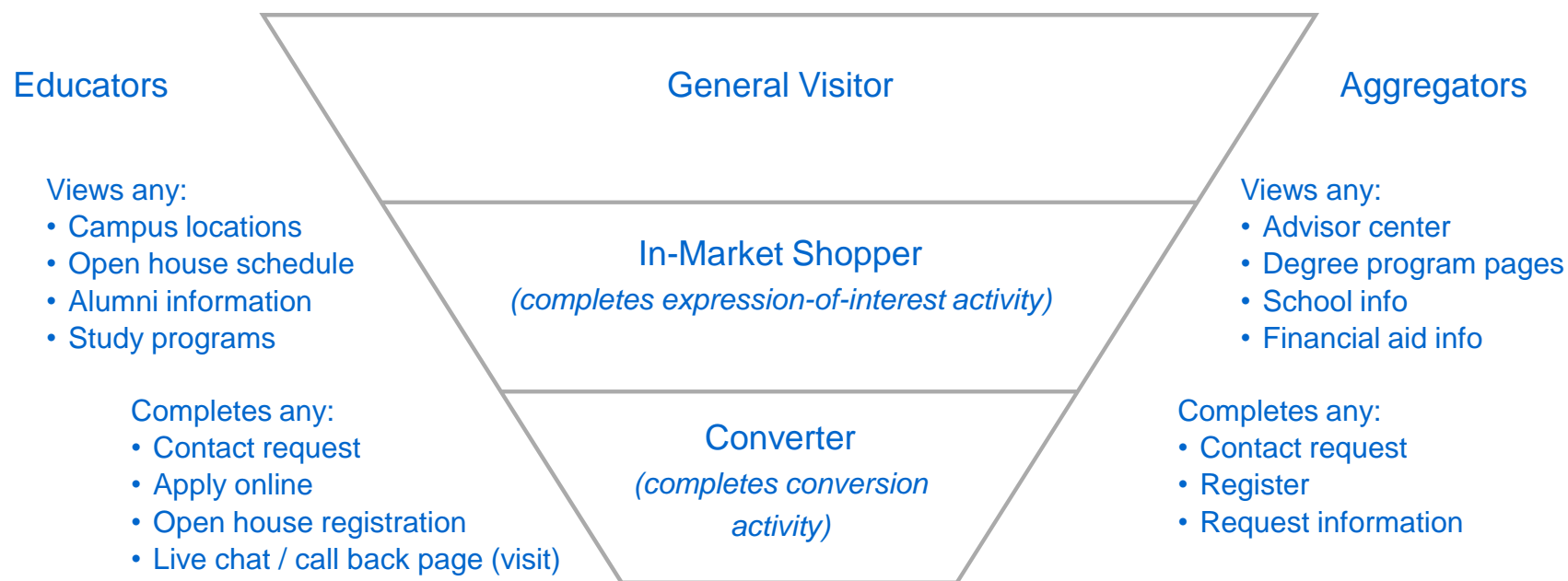
# Methodology



- We defined a basket of leading educator and education aggregator sites
- Through its panel of 2M + U.S. consumers, Compete observed visitors to these sites originating from search engines and portals
- Based on tracking the action these consumers took on these sites, Compete identified their engagement level and location in the purchase funnel

# Definition of “High Quality” Visits / Visitors

- Study defined “high quality” visits as those that resulted in specific action being taken on educator or education aggregator site
- Actions examined included those that represented a move through the purchase funnel





# Search's Role for Education Marketers

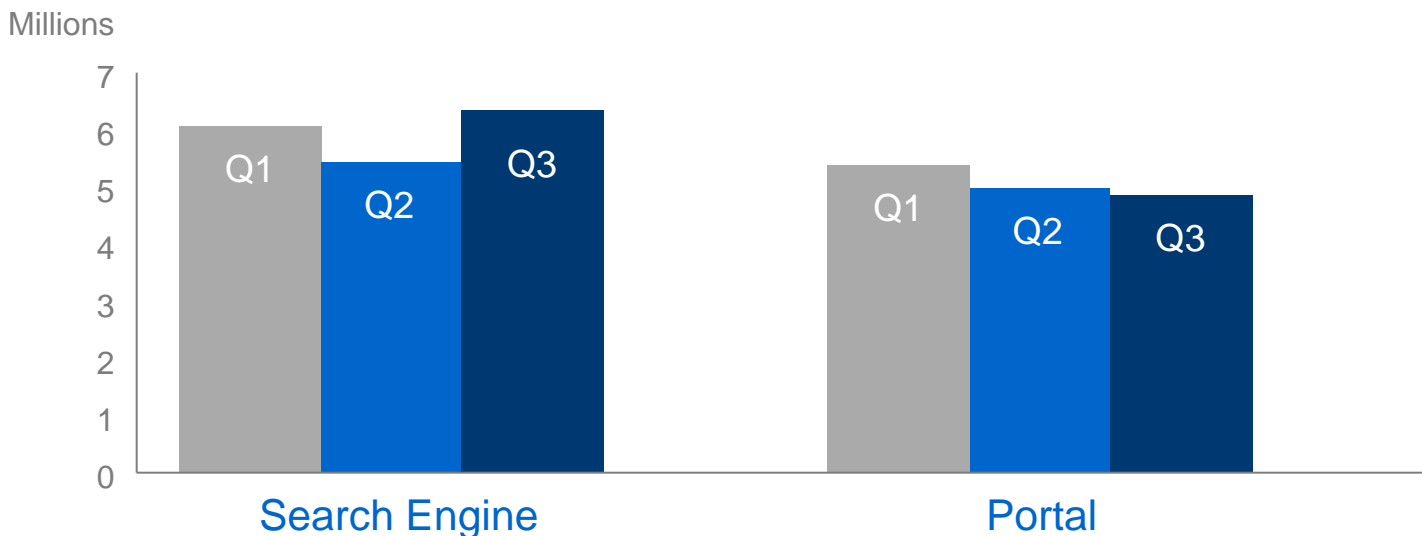
# Search's Role: Summary of Key Findings

- Search drives more visits to education sites quarter over quarter, while the role portals play continues to decline
- Search sends high-quality visitors – in-market shoppers who subsequently convert to leads
- Google has increased in relevance for education marketers, growing faster than other search engines and driving the bulk of in-market shoppers and converters

# Search Outpaces Portals as Source of Visitors

Nearly 7M visitors came from search to educator and aggregator sites in Q3 2008.

Source of Unique Direct Visitors to Education Sites

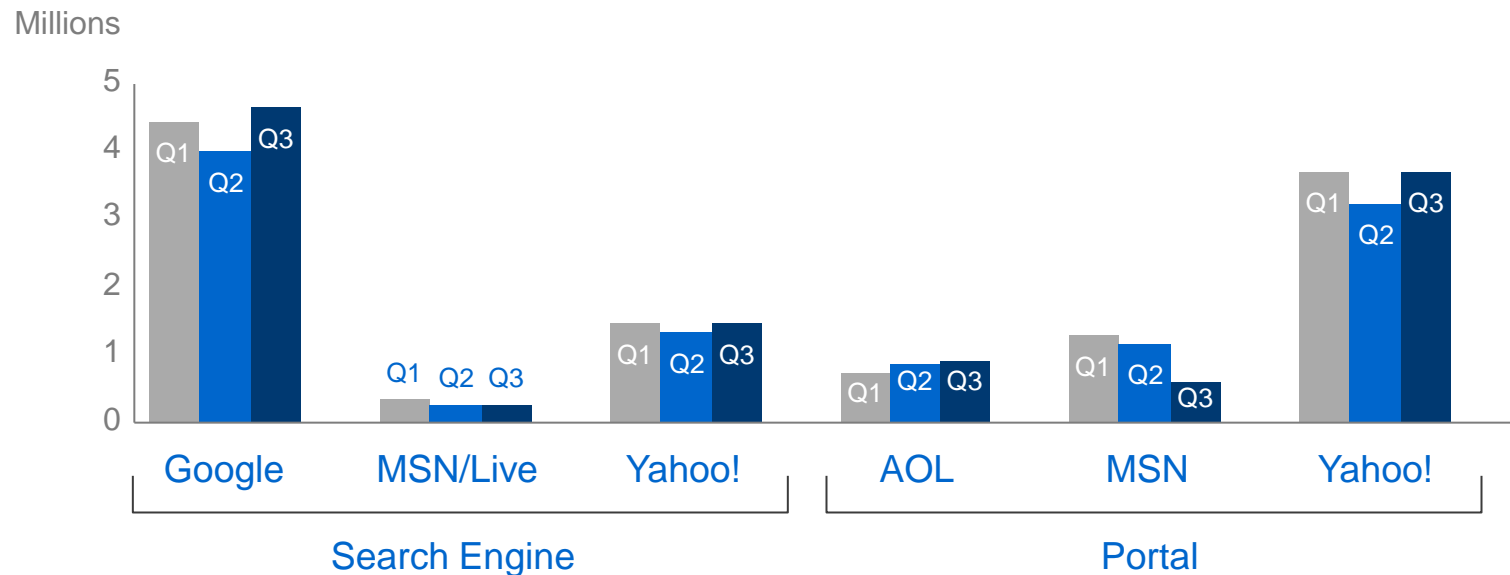




# Google Leads in Traffic and Growth

Google search accounted for **three out of four** search referrals to education sites in Q3 and grew **nearly 3x the market** (as defined by search / portal referrals) quarter-over-quarter.

## Source of Unique Direct Visitors to Education Sites

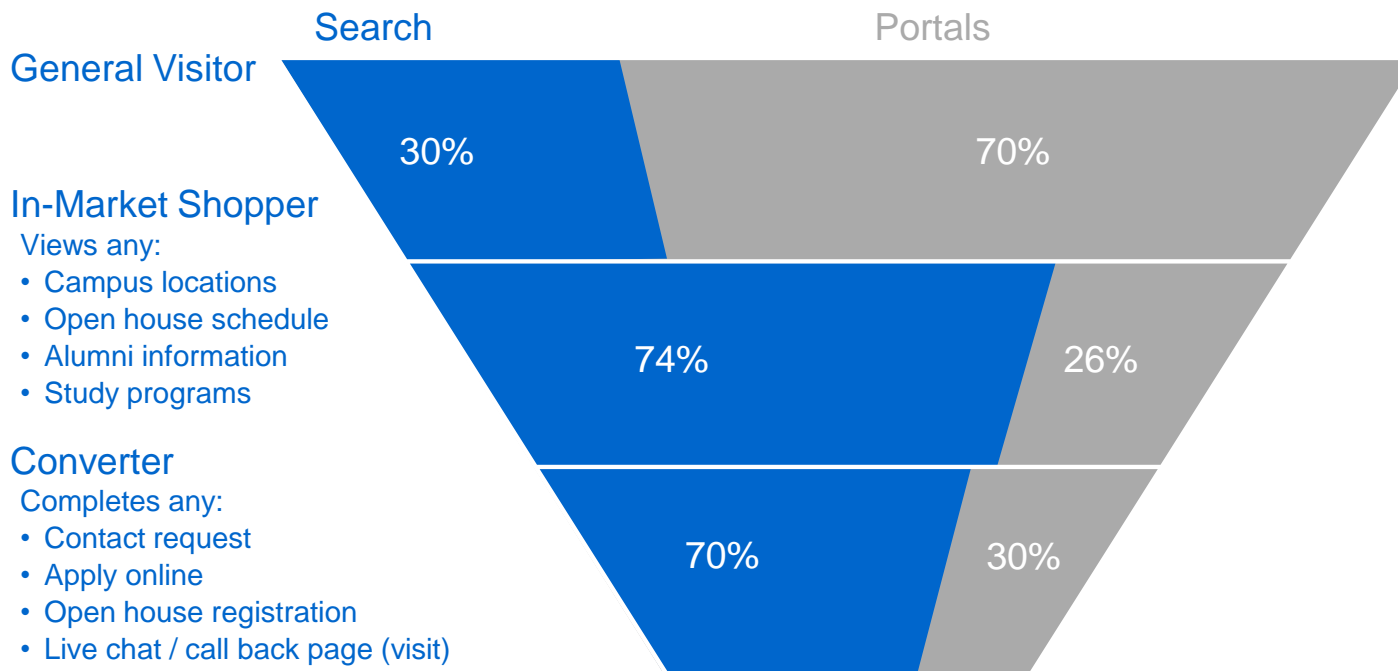


# Search Delivers High Quality Traffic to Educators

In Q3 2008, search delivered 3x as many in-market shopper visits and more than 2.3x as many converter visits to educator sites as portals did

## Sources of Visit to Educator Sites

(Share of direct visits from search engines and portals only, Q3, 2008.)

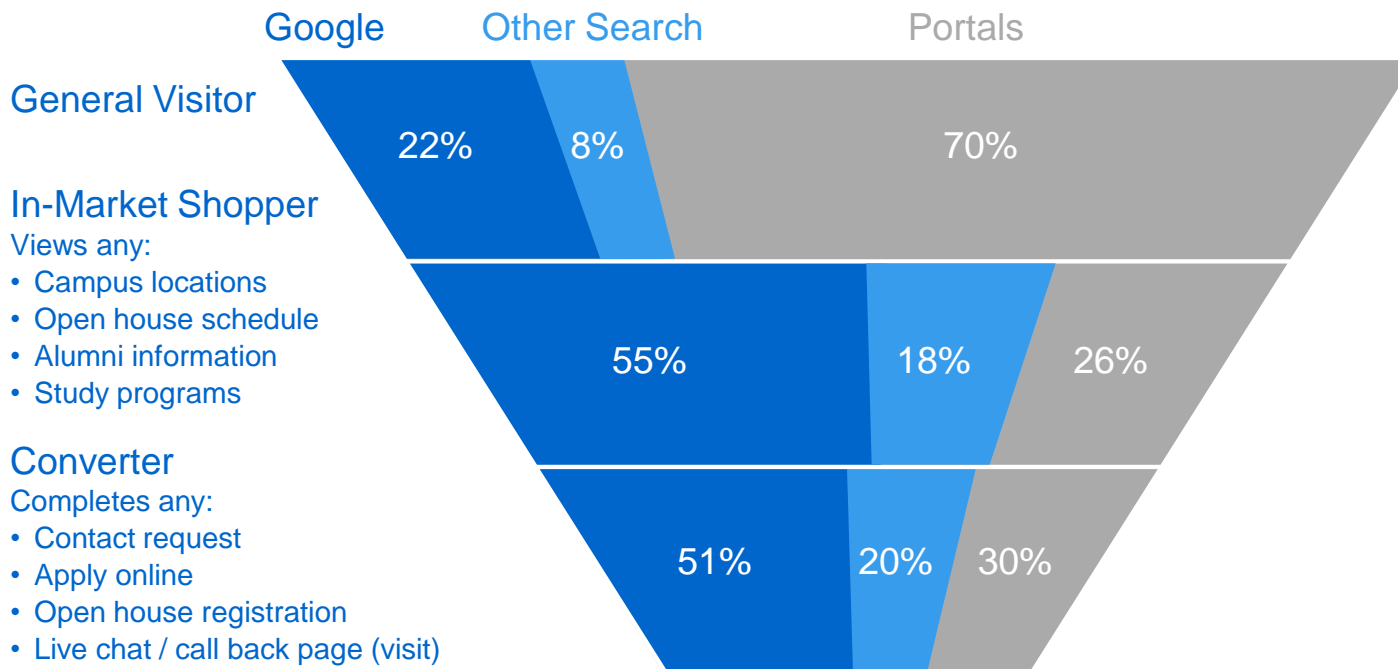


# Google Leads Among Search Players

Google delivered more in-market shopper and conversion visits than any other single search engine or portal.

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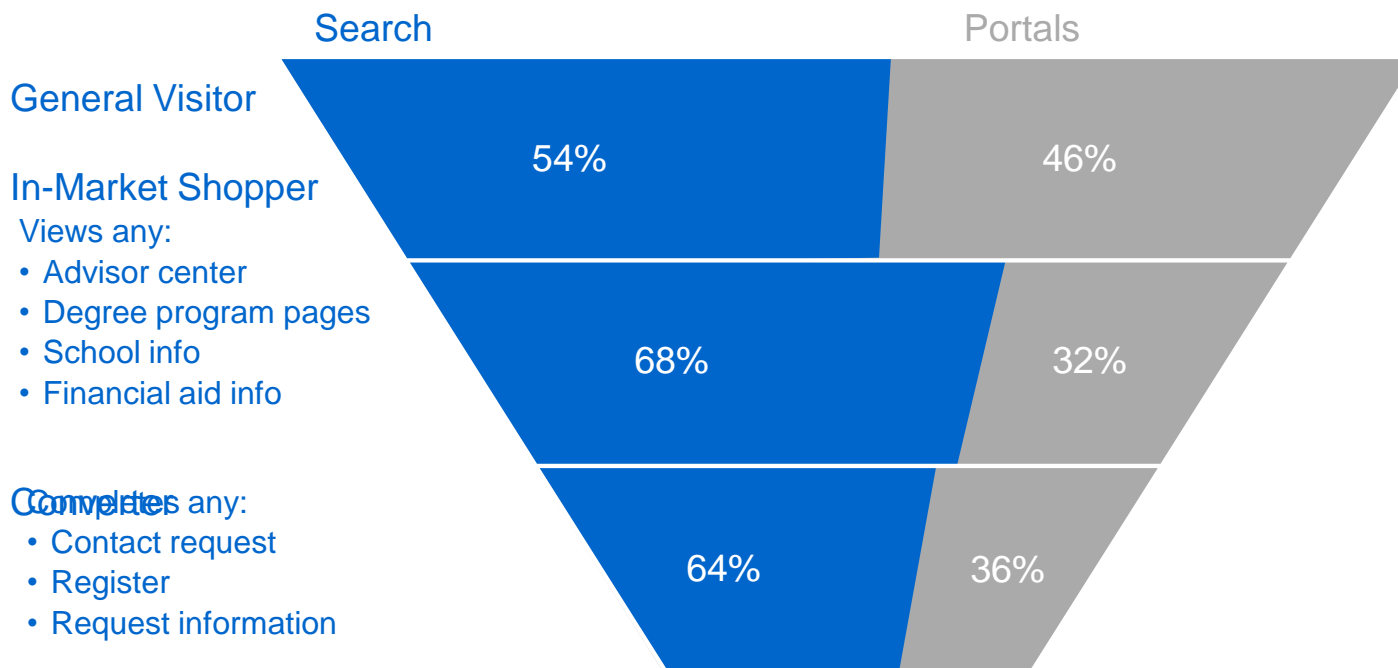


# Search Is Important to Aggregators Too

Aggregators receive the majority of visitors, in-market shoppers and converters from search traffic.

## Sources of Visits to Aggregator Sites

(Share of direct visits from search engines and portals only, Q3, 2008.)

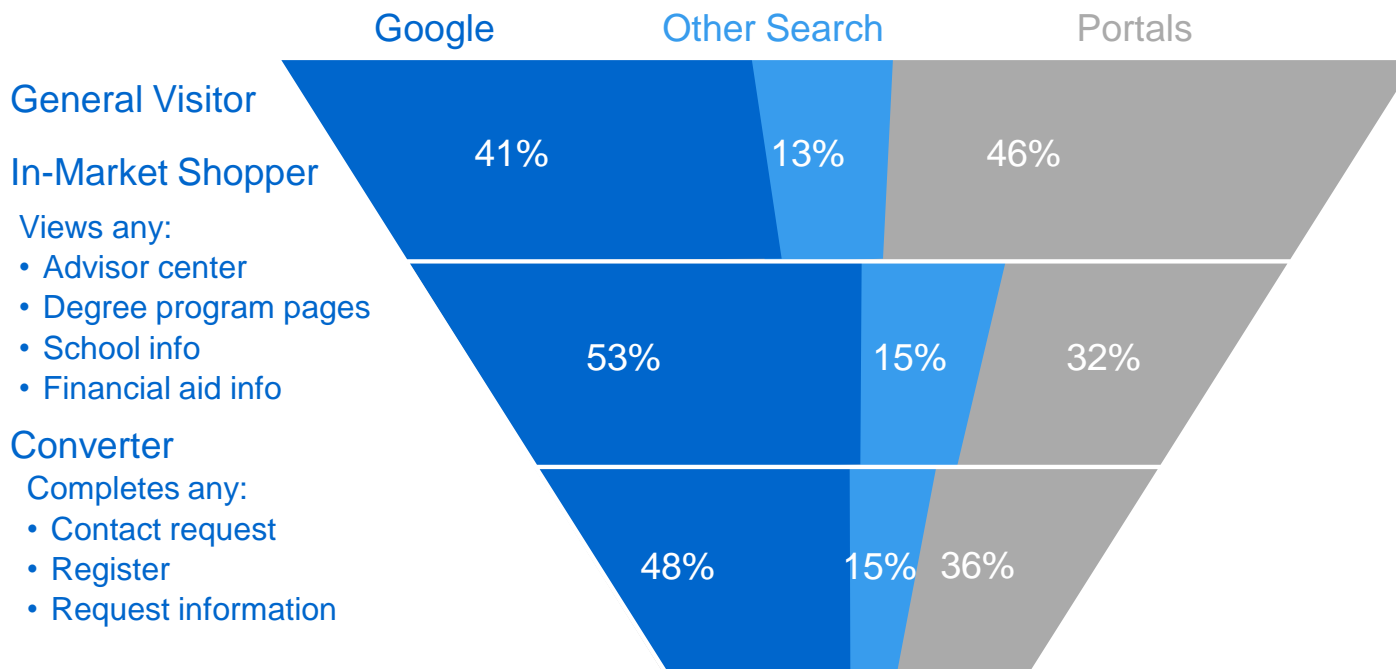


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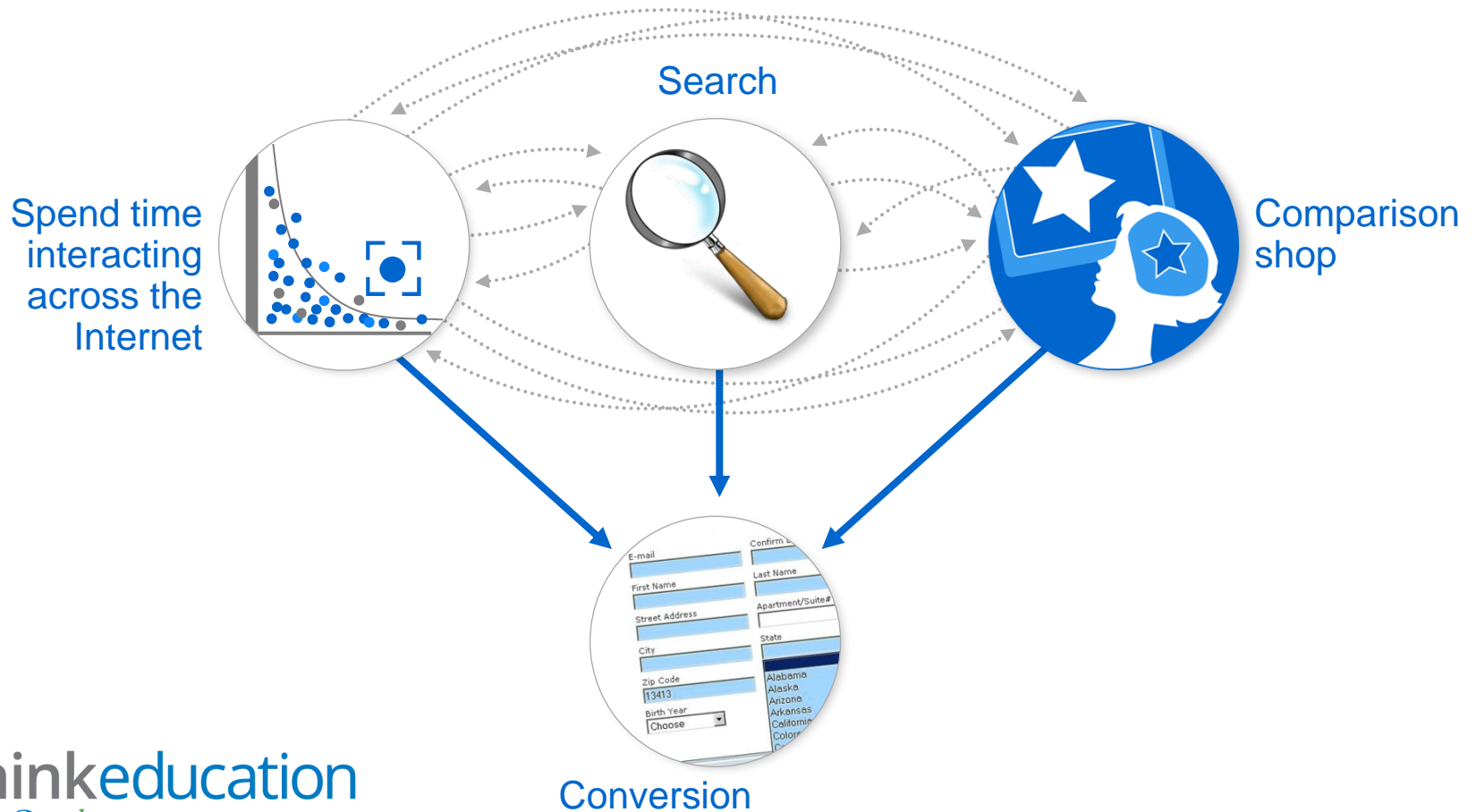
# The Online Research Process for Education

# The Research Process: Summary of Key Findings

- Educational choices are big decisions; converters start searching early and visit sites repeatedly to learn more
- General keywords are an important driver of conversions for aggregator brands; branded keywords are more important for educator brands
- Converters spend time on non-education sites, often during the same Internet session as conversion
- Some consumers fill out lead forms on multiple education sites

# Anatomy of the Research and Conversion Process

Consumers undertake multiple steps online as they travel from first thought to click to conversion





# Search: Searching starts early in the research process

34% referred by search  
by 90 days before conversion



54% referred by search by 60  
days before conversion



60% referred by search by  
30 days before conversion



## HEAVY RESEARCHER SEGMENT

Conversions may not be  
currently attributed to search

88% referred by search  
by day of conversion

12% search immediately prior  
to conversion

## Conversion



# Search: Roughly half of converters are referred by a single search

To reach these converters, marketers must ensure their brand is present through an “always on” search campaign.



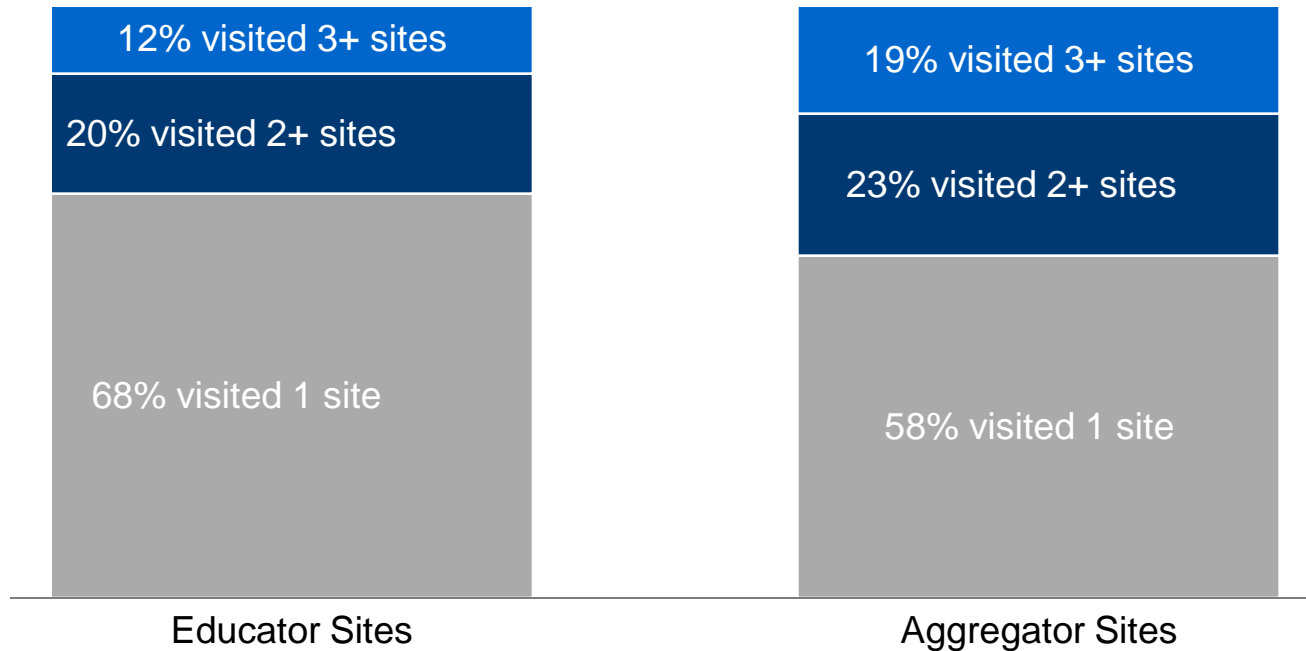
68% of search engine users who click do so on the first page of results.

# Comparison Shop: More than one-third of converters are “comparison shoppers”

Comparison shopping highlights the need for brand engagement across the Internet.

## Pre-Conversion Site Visitation

(Number of sites visited by site category. May - September, 2008.)

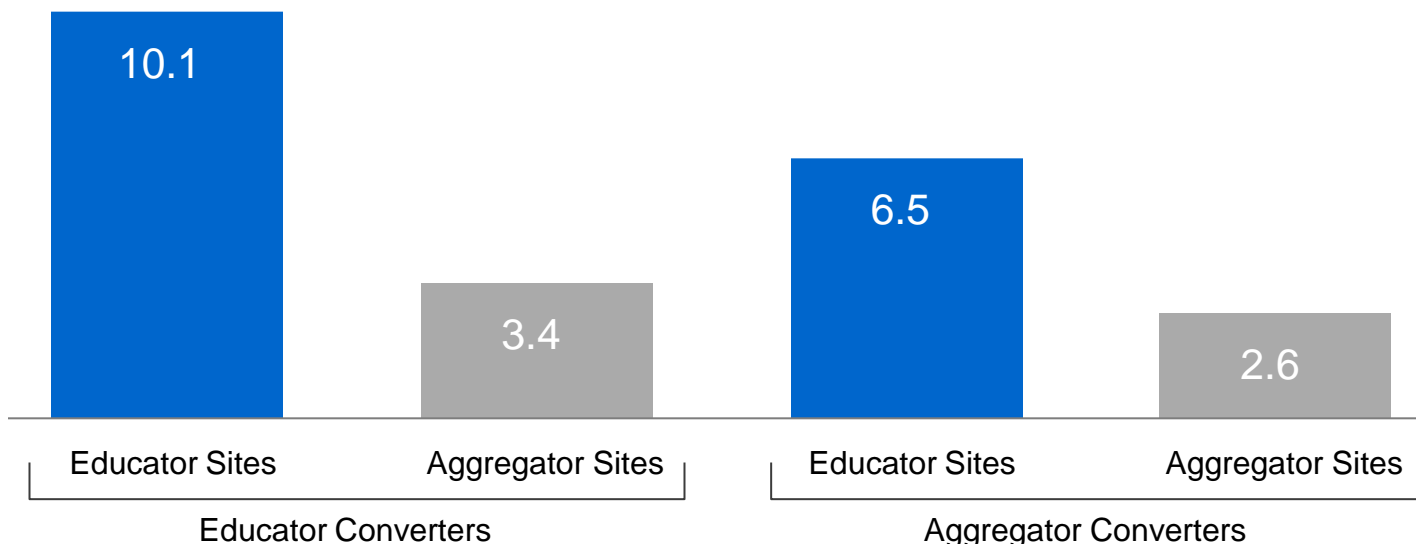


# Comparison Shop: Converters make multiple site visits

Converters visit educator brand sites more than 6.5 times. Converters return to aggregator sites much less often.

## Pre-conversion Visits to Educator and Aggregator Sites

(Average number of visits by category & converter type. May - September, 2008.)



# Spend Time on Non-Education Sites: Converters visit sites during the same Internet session as conversion

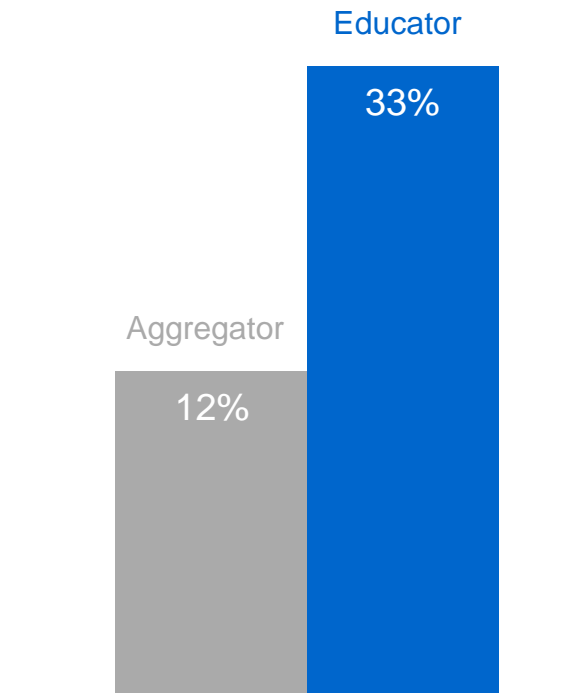
## Converters Same Session Visitation to Google Content Network Channels

(May – September, 2008)

Channel	Educator	Aggregator	Example Sites
Entertainment	39%	27%	 <b>FANDANGO</b>   <b>About.com</b>   <b>ESPN</b>
Social	39%	27%	 <b>myspace.com</b>   <b>facebook</b>   <b>friendster</b>
Careers	32%	25%	<b>jobster</b>   <b>LinkedIn</b>   <b>Job.com</b>
Parents	31%	22%	<b>Parents.com</b>   <b>mothering</b>   <b>RecipeZaar</b>
Minority	30%	21%	 <b>BlackPlanet.com</b>    <b>MiGente.com</b>   <b>gaia</b>
Business	23%	27%	<b>MarketWatch</b>   <b>Simple Studies</b>   <b>TAXSites.com</b>
Gamers	18%	10%	 <b>playfish</b>    <b>KONAMI</b>   <b>Armor Games</b>
Tech	16%	9%	 <b>PC</b>   <b>TechCrunch</b>    <b>ars technica</b>
News	13%	10%	<b>washingtonpost.com</b>    <b>USNews</b>    <b>THE WALL STREET JOURNAL ONLINE</b>

# Spend Time on Non-Education Sites: Converters visit YouTube during research and conversion

YouTube is the leading online video source for education seekers.



Converters Same Session Visitation  
(May – September, 2008)



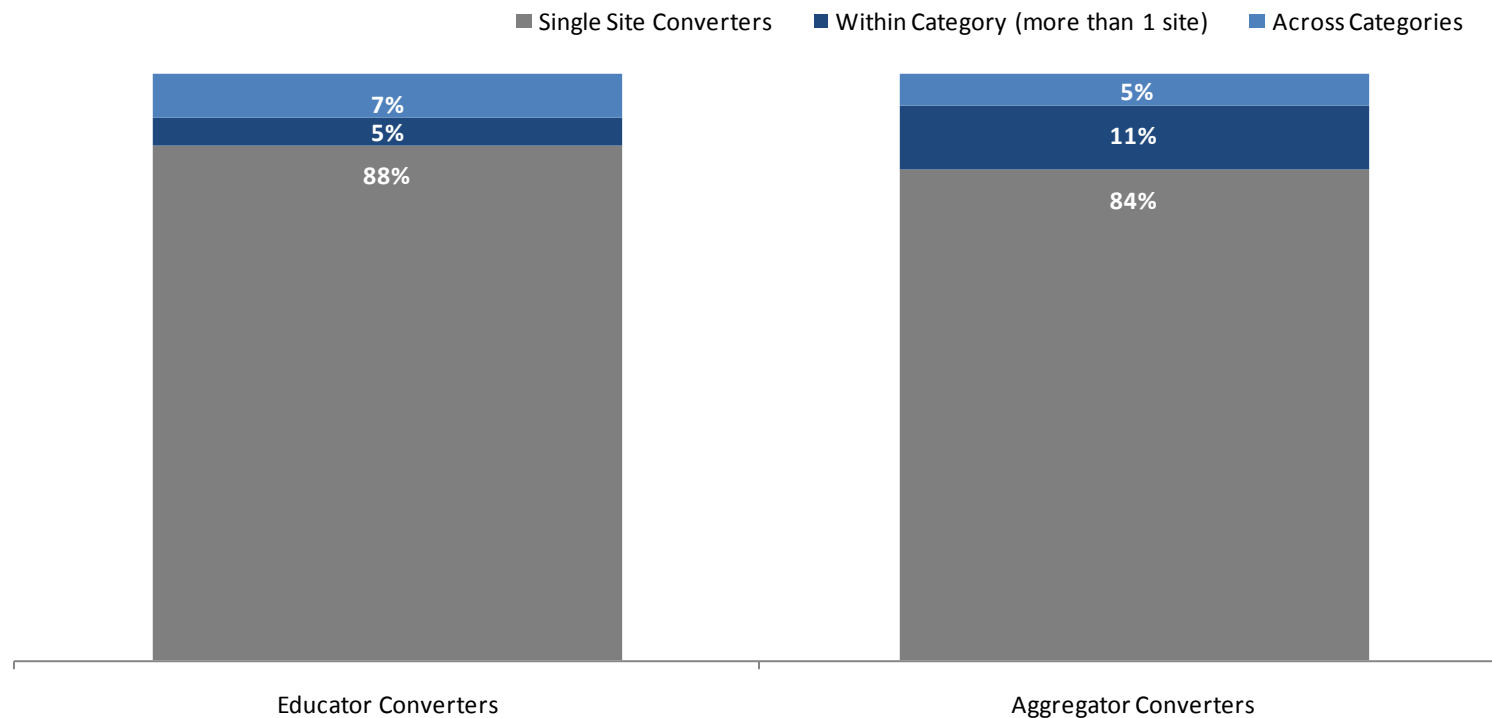
- Converters are 71% more likely than the general U.S. population to visit YouTube
- YouTube is the #1 video site among college students
- Example: 400,000+ videos available for “university”

# Convert: Some consumers convert on multiple sites

Aggregator converters are more likely to convert across multiple sites, with 16% of them converting on more than one aggregator site or on an aggregator site and an educator site.

## Conversion Patterns for Educator and Aggregator Converters

(Multiple and single converters by category & converter type. May - September, 2008.) z





# Marketing Implications



# Five Key Takeaways and Implications

## Takeaway

## Marketing Implications

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|---|--|
| <b>1</b> Search occurs early, as much as 4 months before conversion.                    | <ul style="list-style-type: none"><li>• Search may be even more valuable in driving conversions than you think.</li><li>• Launch search campaigns for new programs and courses of study early.</li></ul> |
| <b>2</b> More than half of searchers find the info they need after one search.          | <ul style="list-style-type: none"><li>• Ensure you are part of the consideration set by running always-on search campaigns.</li></ul>  |
| <b>3</b> Comparison shopping among education websites is high.                          | <ul style="list-style-type: none"><li>• Consider incorporating rich media and online video to help your site stand out and drive stickiness.</li></ul>   |
| <b>4</b> The Google Content Network includes channels with high reach among converters. | <ul style="list-style-type: none"><li>• Reach in-market shoppers via GCN sites.</li><li>• Build engagement with display, text and video ads on relevant content sites, including YouTube.</li></ul>      |
| <b>5</b> Aggregator converters are more likely to convert on more than one site.        | <ul style="list-style-type: none"><li>• Focus on providing unique value on your site to reduce duplicate conversions</li><li>• Understand how your clients track duplications</li></ul>                  |
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