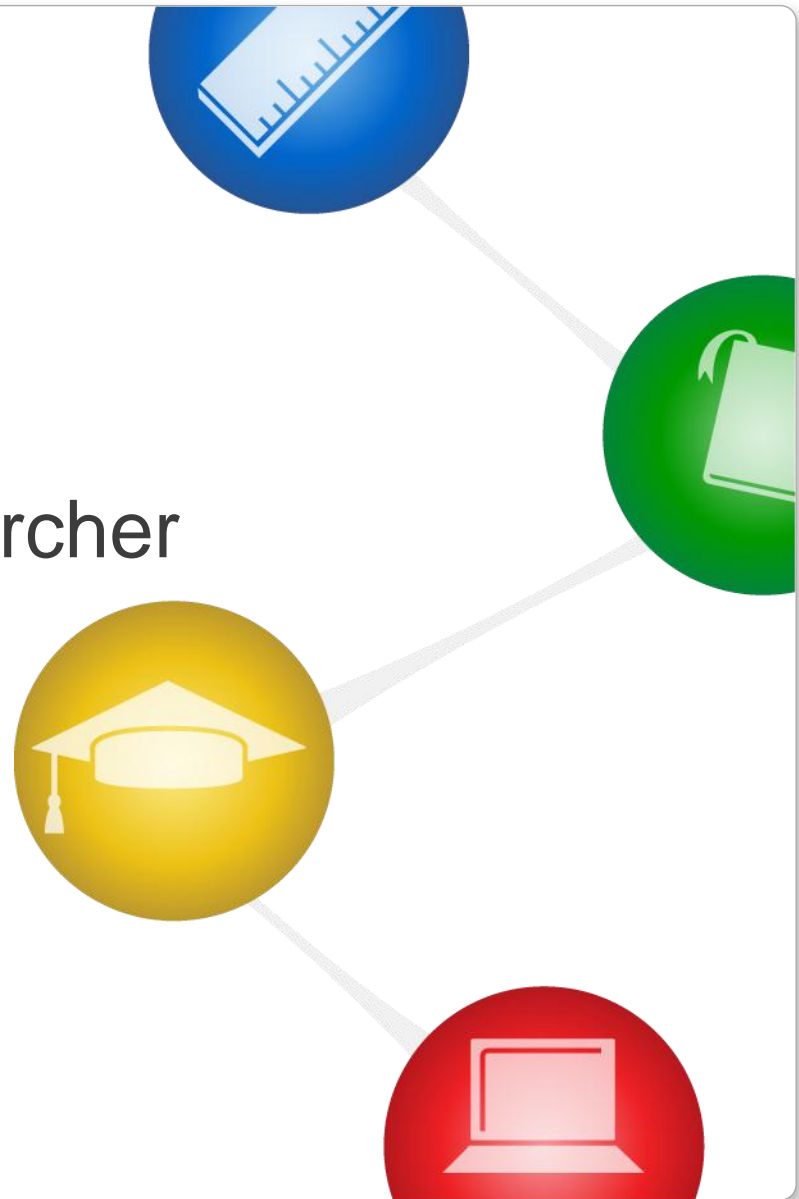# thinkeducation
with Google

Engaging the eduSearcher in a New Reality

Google/Compete, U.S.
March 2011

Last Year, We Introduced the "eduSearcher"

Research windows are long, at least a month for most

Search is the #1 source they rely on for education research

Specific education brands are not top of mind

Non-searchers still find value in online research

thinkeducation
with Google

In Q3 2010, We Revisited the eduSearcher

Consistent Methodology

- **Research Partner**: Compete (2M+ US consumer panel)

- **Objective**: Understand EDU clickstream behavior, attitudes

- **Timing**: Q3 2010

- **Qualitative Study**: Behaviorally target those who converted during the study timeframe to dive deeper into attitudes and behaviors surrounding education research

New to This Year's Study

- Measured the full scope of the Google Display Network

- Focused only on those researching education for themselves

- Expanded scope of qualitative survey

thinkeducation
with Google

Defined Set of Educator & Aggregator Sites

Educator Sites

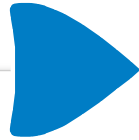|		
Allied	eCornell	Ross University
American Intercontinental University	Everest	South University Ground
American Public University System	Excelsior College	South University Online
Argosy	Fullsail	Stratford Career Institute
Art Institutes Ground	Grand Canyon University	Strayer
Art Institutes Online	Herzing College	University Of Phoenix
At Home Professionals	High Tech	Universal Technical Institute
Capella	ITT Tech	Walden
Berkeley College	Kaplan	Weston Distance Learning
Brown Mackie	Lincoln	Westwood
Colorado Tech	McKinley College	Wyotech
Cordon Bleu	Post University	
DeVry	Remington	

Aggregator Sites

|			
All Star Directories	Course Advisor	Elearners	Quinstreet
Classes USA	Cunet	Fastweb	Tightrope Interactive
College Board	Education Dynamics	Gradschools	Vantage Media
College Bound	education.org	Plattform	Venture Direct

thinkeducation
with Google

The New Reality for Engaging the eduSearcher

eduSearchers are More Informed, But Converting Less.

What's in a Name? For eduSearchers, a lot.

Edu Decision Paths are Scattered, Non-linear.

thinkeducation
with Google
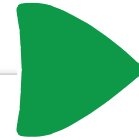
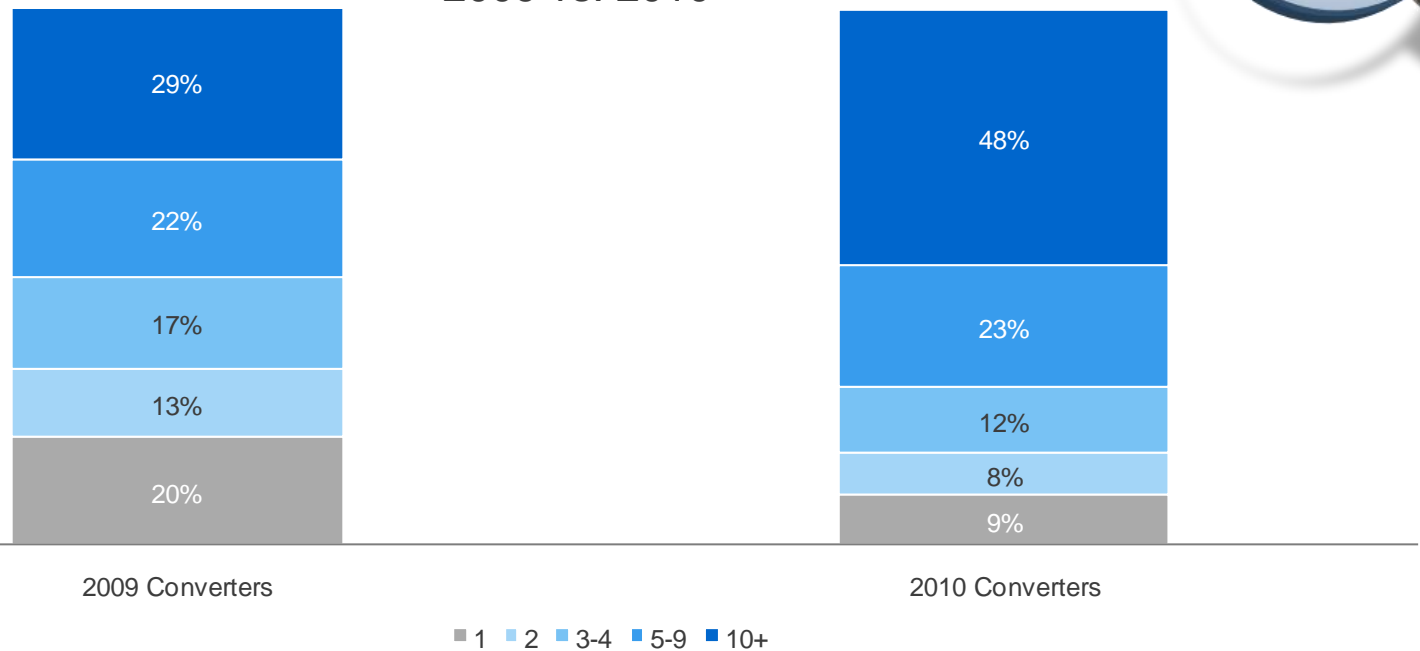# Online Channel Growing for eduSearchers

Unique visitors to Education sites grew **40%** year over year.

Total education queries grew **33%** year over year.

thinkeducation
with Google

More Searches Occurring, and More Often

Heavy Searchers (10+ queries prior to conversion) grew from 29% to 48%

Search Query Frequency by % of Converters
2009 vs. 2010

2009 Converters
- 29%
- 22%
- 17%
- 13%
- 20%

2010 Converters
- 48%
- 23%
- 12%
- 8%
- 9%

Legend: 1 ▪ 2 ▪ 3-4 ▪ 5-9 ▪ 10+

thinkeducation
with Google

Source: Google & Compete, Inc "Engaging with the eduSearcher in a New Reality" March 2011

Online Content Plays a Large, Recurring Role

Of those converters referred by the Google Display Network:

88% are referred
2+ times

17% are referred
10+ times

Source: Google & Compete, Inc "Engaging with the eduSearcher in a New Reality" March 2011

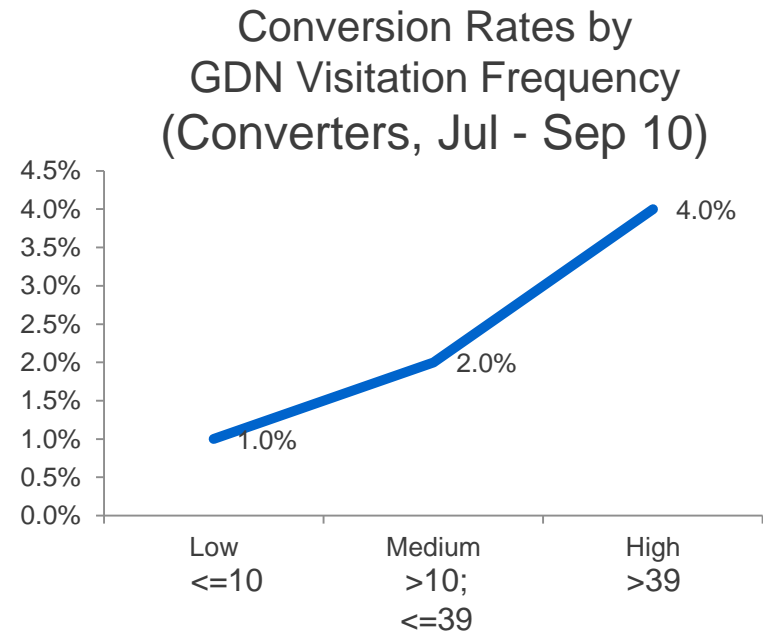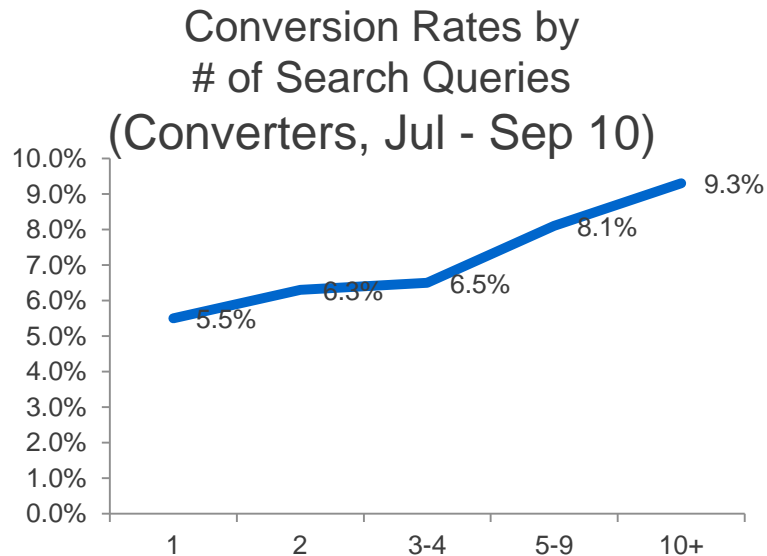# One Brand Site Visit Just Isn't Enough

87% of converters visit an education site at least twice before converting

Frequency of Repeat Visits to Education Site Before Conversion
(Converters, Jul – Sep 10)

13%	12%	18%	25%	32%
1	2	3-4	5-9	10+

thinkeducation
with Google
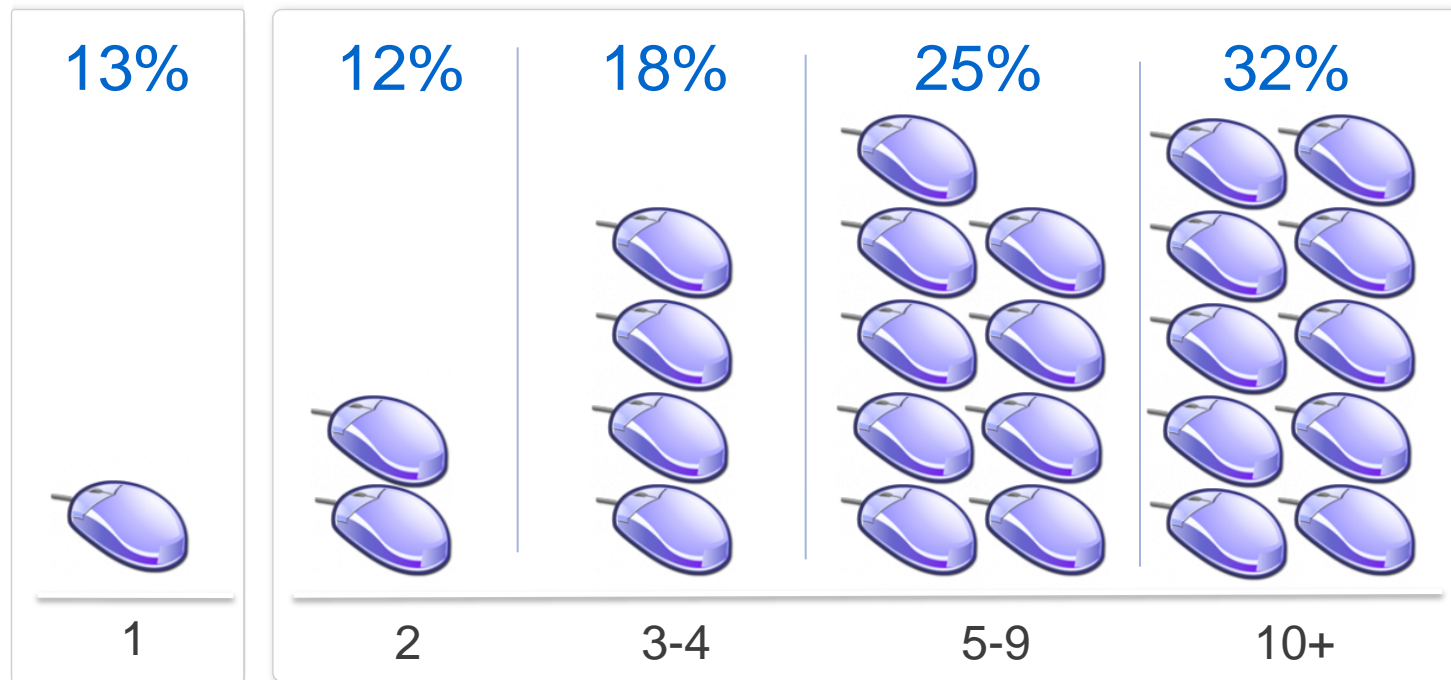
More Research Means More Likely to Convert

As online research increases,
conversion rate grows as well.

Conversion Rates by
# of Search Queries
(Converters, Jul - Sep 10)

- 5.5% — 1
- 6.3% — 2
- 6.5% — 3-4
- 8.1% — 5-9
- 9.3% — 10+

Conversion Rates by
GDN Visitation Frequency
(Converters, Jul - Sep 10)

- 1.0% — Low <=10
- 2.0% — Medium >10; <=39
- 4.0% — High >39

However, Fewer eduSearchers are Converting

The new reality means finding new ways
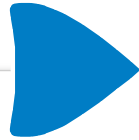to convince researchers to take the next step.

More Prospective
Students….

40%

more
unique
Education
site
visitors*
since
2009

decline in
Education
converters

3%
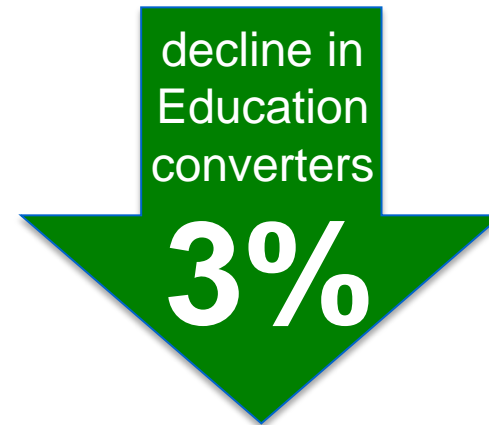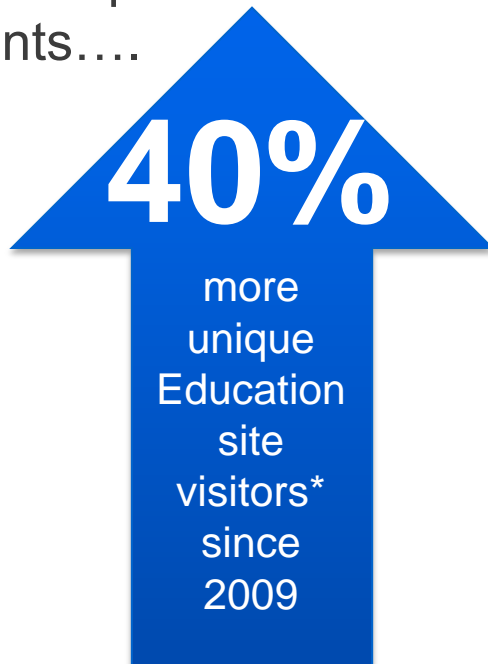
…but Fewer Taking Action

*Includes both Educator and Aggregator site visitors
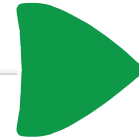
thinkeducation
with Google

The New Reality for Engaging the eduSearcher

eduSearchers are More Informed, But Converting Less.

What's in a Name? For eduSearchers, a lot.

Edu Decision Paths are Scattered, Non-linear.

thinkeducation
with **Google**

Brand is Highly Influential in School Selection

**71%** say that a school's name and reputation is very important in deciding where to apply.

Even more so for students planning to apply to a for-profit school (78%).

thinkeducation
with **Google**

There's Still Much Branding Work to be Done

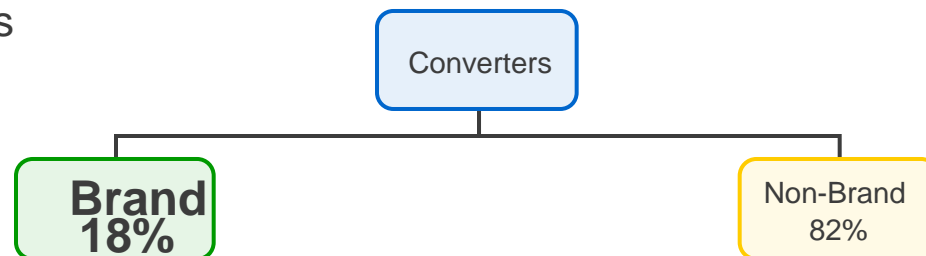Nineteen percent of **first queries** by eduSearchers are branded, only 1 PPT higher than year ago.

Query Path of Converters
2010

Query 1

Converters

Brand 19%

Non-Brand 81%
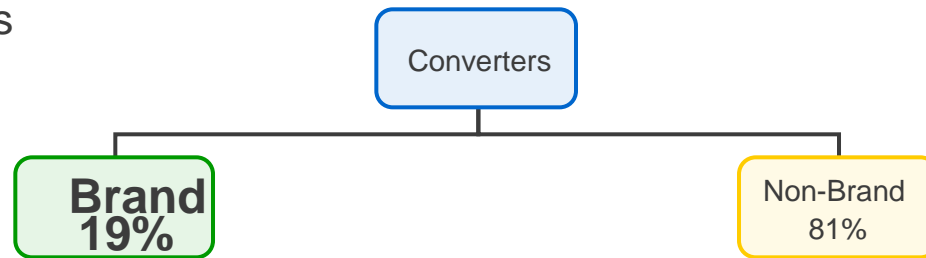
Query Path of Converters
2009

Query 1

Converters

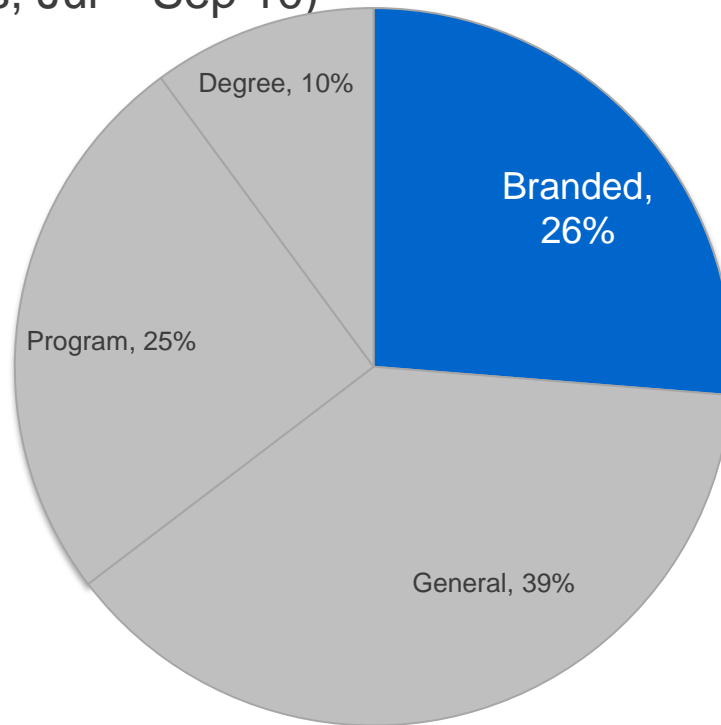**Brand 18%**

Non-Brand 82%

thinkeducation
with **Google**

eduSearchers are Seeking Brand Info Online

More than a quarter of education queries are branded vs. 15% in 2009

Search Query by Term Type
(Converters, Jul – Sep 10)

Pie chart:
- Branded, 26%
- General, 39%
- Program, 25%
- Degree, 10%

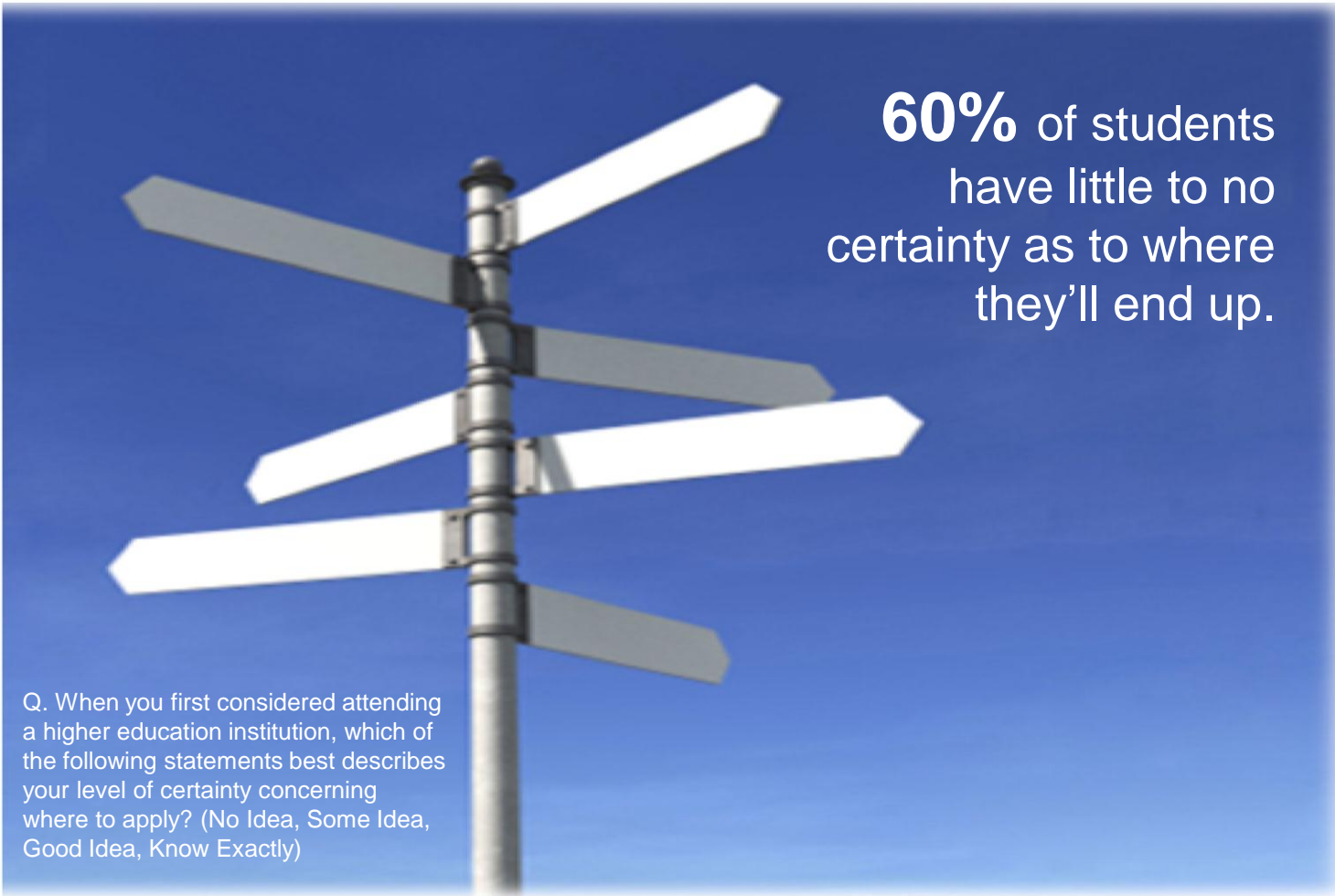| Term Type	Example Query
Branded	argosy schools
	program at gibbs
General	apply for school online
	Minority scholarship
Program Specific	accountant class
	courses in interior design
Degree	associate degree online
	vocational certificate

thinkeducation
with **Google**

Ad Interactions Guide Perceptions, Decisions

Of those who applied to schools not in their original consideration set, nearly half (47%) found internet ads to be very helpful in making their decision.

Q. Please indicate how useful each of the following types of advertisements were in your higher education institution research process? Base: Applied to a school they did not originally intend to apply to.
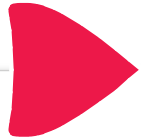
thinkeducation
with Google

The Conversation is Yours to Steer.

60% of students have little to no certainty as to where they'll end up.

Q. When you first considered attending a higher education institution, which of the following statements best describes your level of certainty concerning where to apply? (No Idea, Some Idea, Good Idea, Know Exactly)

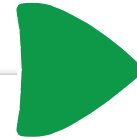**think**education
with **Google**

The New Reality for eduSearchers

eduSearchers are More Informed, But Converting Less.
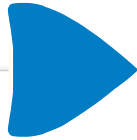
What's in a Name? For eduSearchers, a lot.

Edu Decision Paths are Scattered, Non-linear.

thinkeducation
with Google

18

Search a Main Driver of Education Conversions

-3%
year over year growth in education converters

16%
year over year growth in education converters *referred by Search Engines*

70%
of education converters are referred by Search Engines

thinkeducation
with Google

eduSearchers Initiate Their Research Early On

**Half of conversions occur
2+ months after time of Search Referral**

% of Converters Referred by Search

76% 30-120 days out

50% 60-120 days out

Value	
29	90-120
21	60
26	30
24	SAME
100	Total

Days before Conversion

Total

thinkeducation
with Google

Source: Google & Compete, Inc "Engaging with the eduSearcher in a New Reality" March 2011

What's Occurring Between Referral & Conversion?

Online & Offline Resources Most
Used by Prospective Students
During Research Process

School
Website
75%

Family /
Friends
38%

Social
Networks
16%

Search
Engines
58%

Aggregators
34%

Teachers /
Advisors
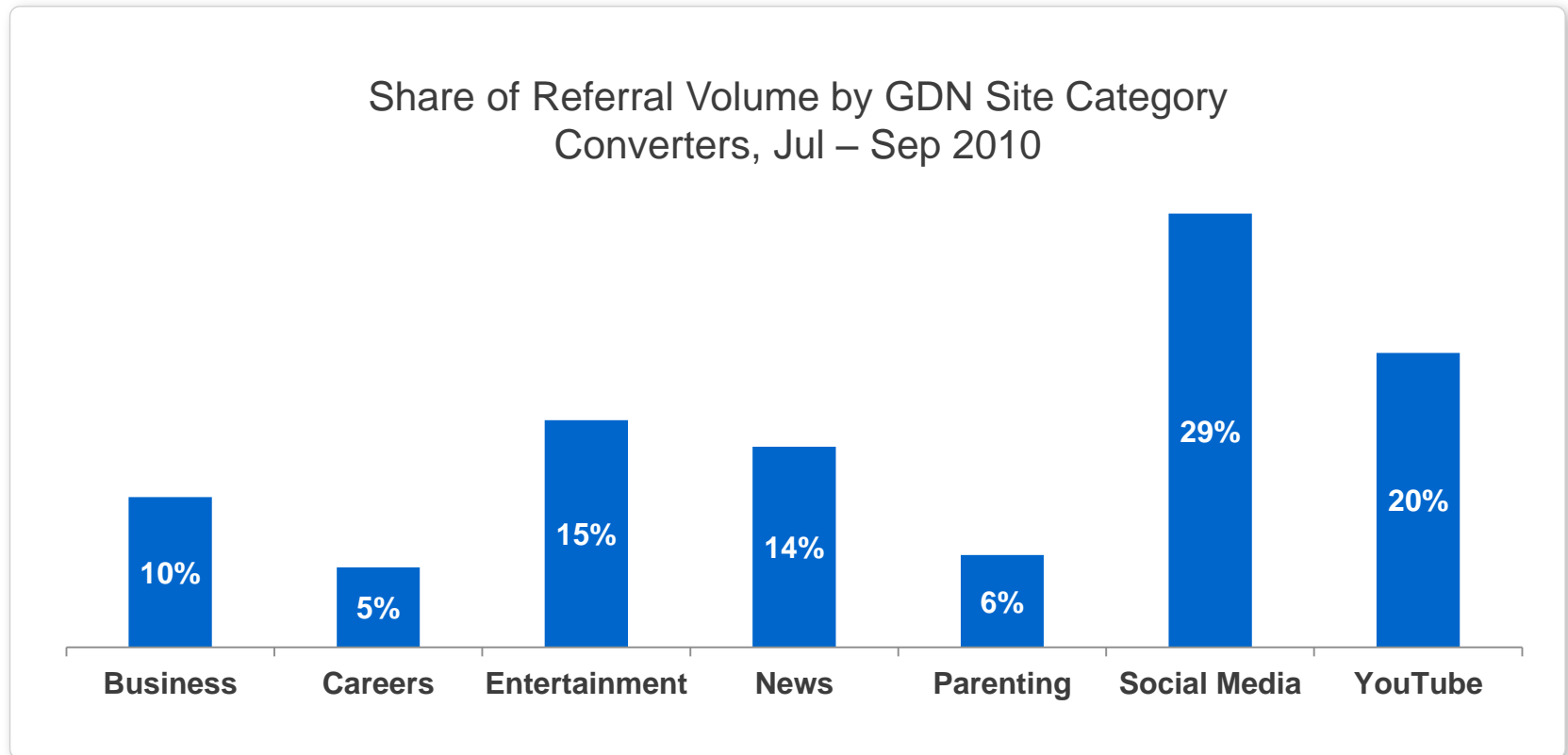15%

Brochures
43%

Review/Ran
king Sites
21%

Television
14%

Q. Specifically, which of the following sources did you use to look for
information on higher education institutions? Please select all that
apply.)

thinkeducation
with Google

Wide Variety of Sites Consulted Along the Way

Share of Referral Volume by GDN Site Category
Converters, Jul – Sep 2010

Business	Careers	Entertainment	News	Parenting	Social Media	YouTube
10%	5%	15%	14%	6%	29%	20%

Social Media Presence Critical to Protect Brand

Amongst the top 15 influencers on a student's opinions of a school, Social Media is the only one with an overall negative influence.

Q. Which of the following, if any, has had a strong positive/negative influence on your opinion of an education institution you are planning to apply to? (n=618)

thinkeducation
with Google
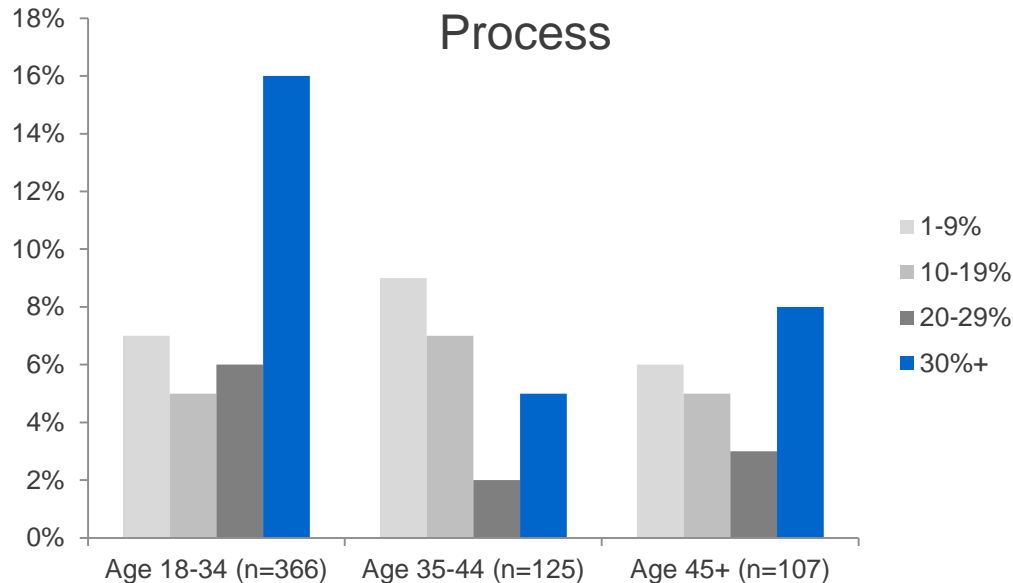
Video Engagement Can Have Powerful Impact

Nearly half (48%) of a school's site visitors who were referred by the school's YouTube brand channel convert.

Nearly 1/3 of eduSearchers Use Mobile Devices

Amongst adults 18-34, one in six use their mobile more than 30% of the time

Penetration Rate of Mobile Phones in Research Process

Legend:
- 1-9%
- 10-19%
- 20-29%
- 30%+

Chart categories:
- Age 18-34 (n=366)
- Age 35-44 (n=125)
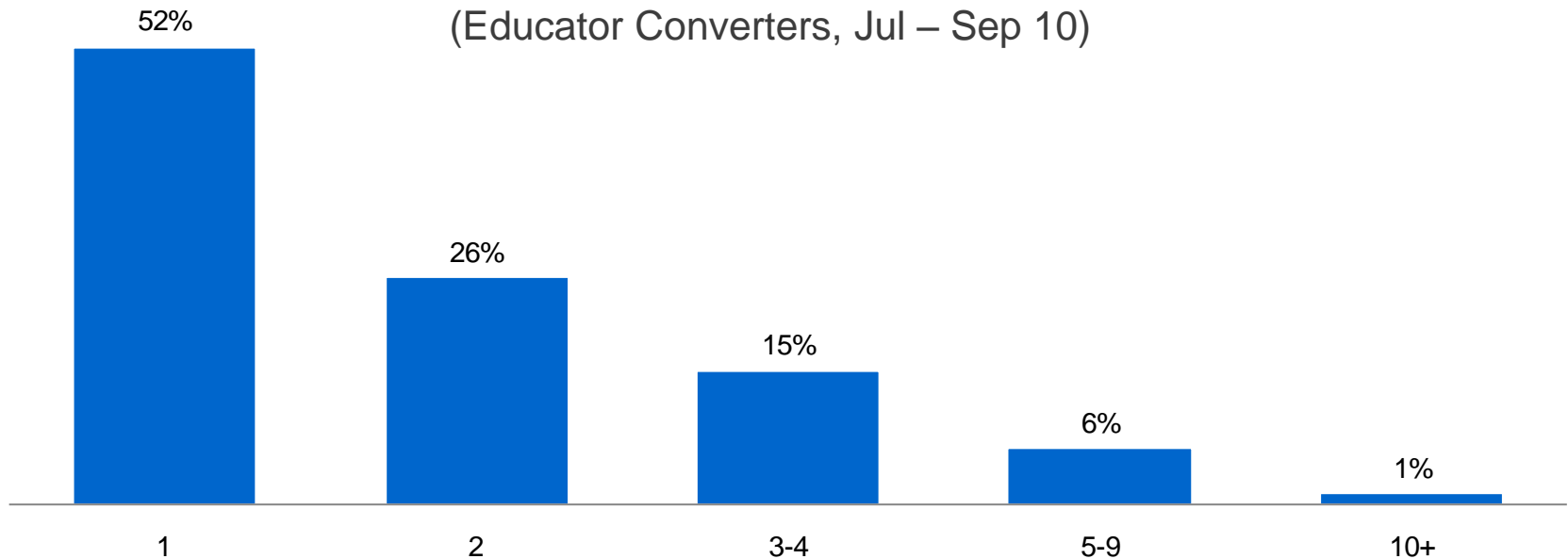- Age 45+ (n=107)

Y-axis: 0% to 18%

Q. Considering all the time you spent researching higher education institutions, what % of that time did you spend using your mobile phone for research purposes? Please select one answer only. (n=618)

thinkeducation
with Google

To Make the Short List, Early Touchpoints Critical

Over half of those who convert on a school's site visit only that one site.

Number of Brand Sites Visited Before Conversion
(Educator Converters, Jul – Sep 10)

Category	Value
1	52%
2	26%
3-4	15%
5-9	6%
10+	1%

Source: Google & Compete, Inc "Engaging with the eduSearcher in a New Reality" March 2011

Key Implications for the New Reality

- Don't Force Users Down a Path.

- Mobilize your brand.

- Widen the scope of your message.

- Assign value to upper funnel touchpoints.

thinkeducation
with Google

**Like what you learned?
Find more data and thought starters at**

thinkinsights
with Google™

www.thinkwithgoogle.com/insights