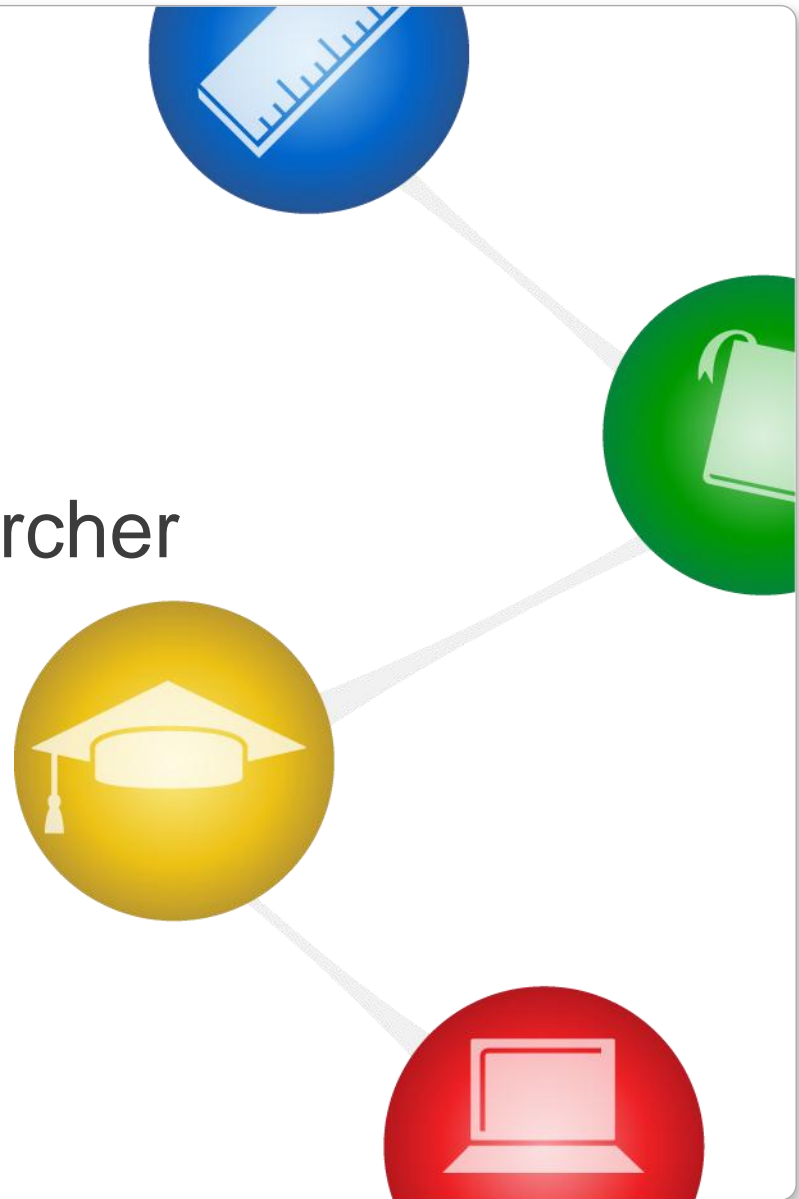


thinkeducation  
with Google

## 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

# 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

# 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               |                               |

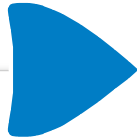
## Aggregator Sites

|                      |                    |             |                       |
|----------------------|--------------------|-------------|-----------------------|
| 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        |

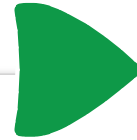
# The New Reality for Engaging the eduSearcher



eduSearchers  
are More  
Informed, But  
Converting  
Less.



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



Edu Decision  
Paths are  
Scattered,  
Non-linear.

# Online Channel Growing for eduSearchers



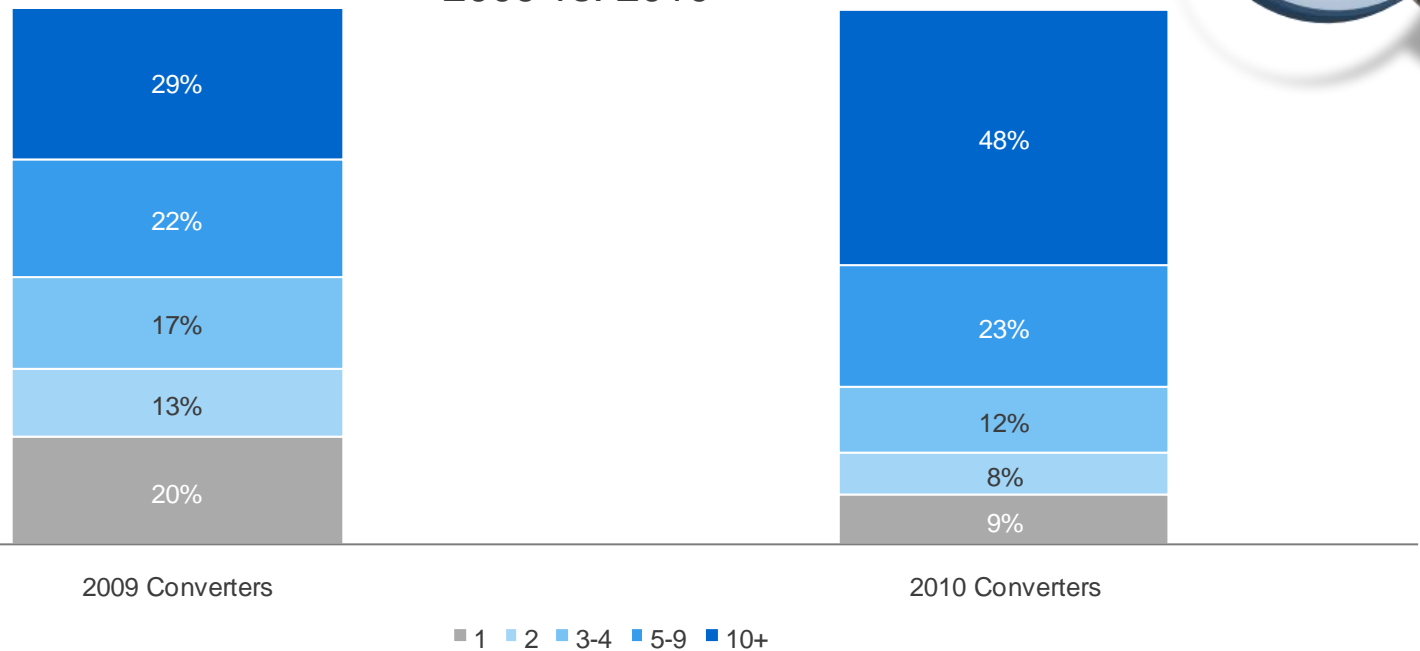
Unique visitors to  
Education sites grew  
**40%** year over year.

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

# 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



# 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**

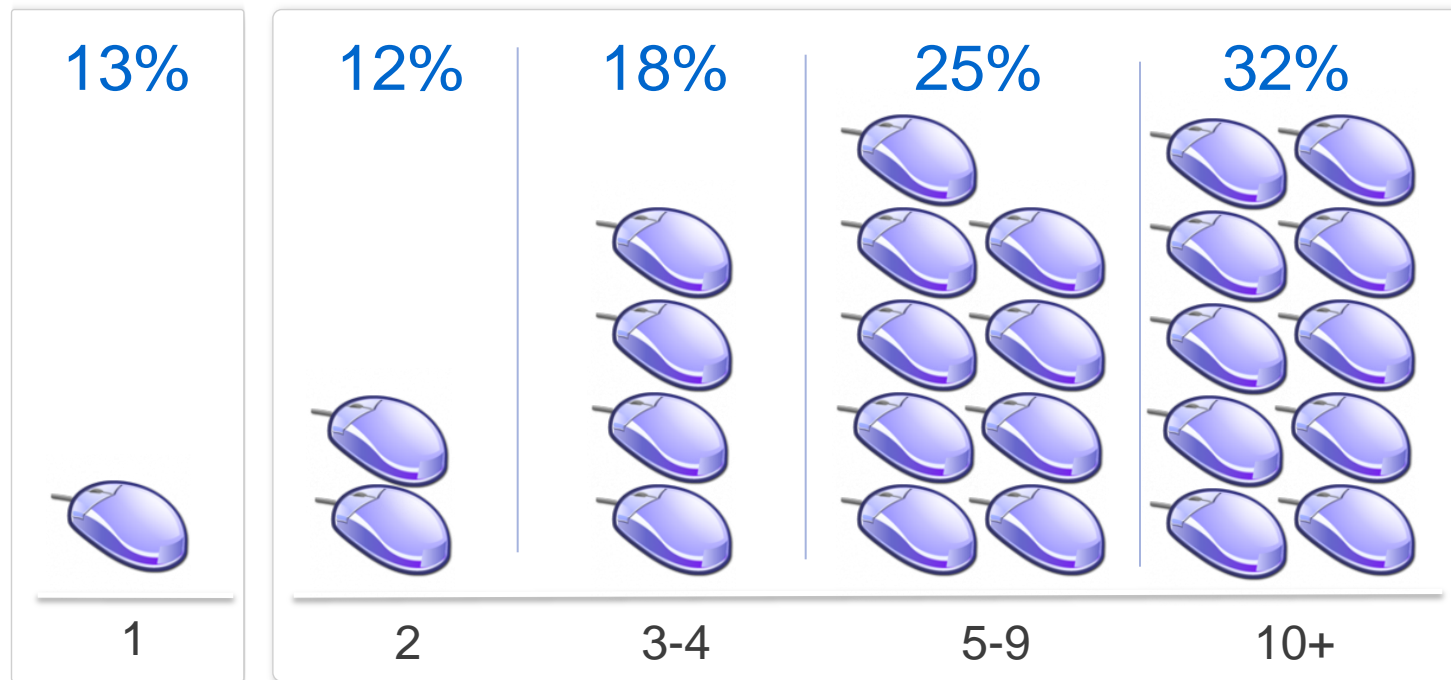




# One Brand Site Visit Just Isn't Enough

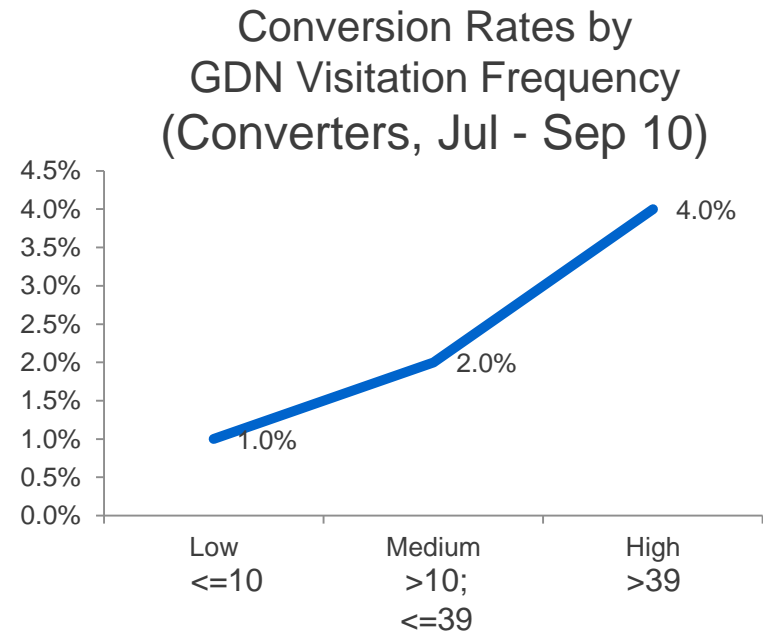
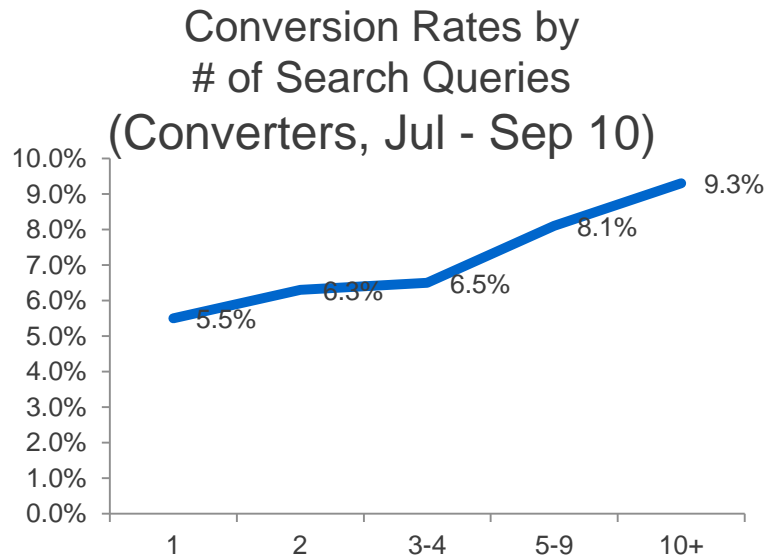
87% of converters visit an education site at least twice before converting

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



# More Research Means More Likely to Convert

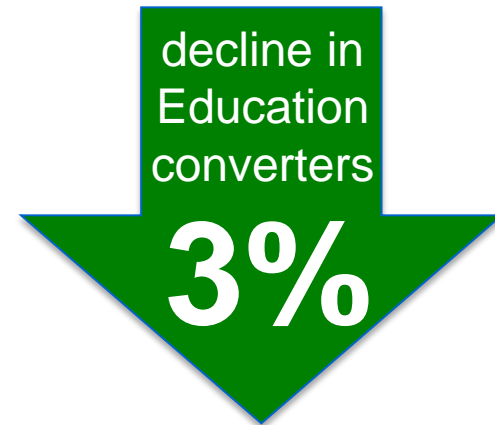
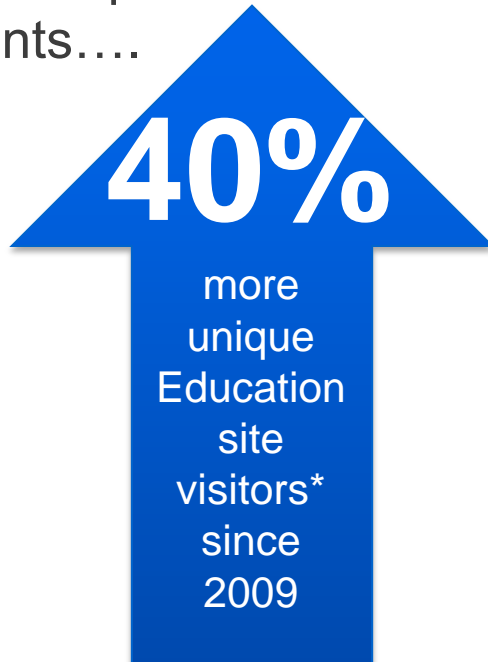
As online research increases,  
conversion rate grows as well.



# However, Fewer eduSearchers are Converting

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

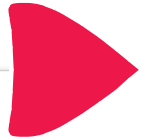
More Prospective Students....



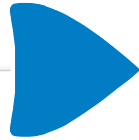
...but Fewer Taking Action

\*Includes both Educator and Aggregator site visitors

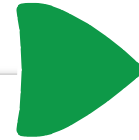
# The New Reality for Engaging the eduSearcher



eduSearchers  
are More  
Informed, But  
Converting  
Less.



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



Edu Decision  
Paths are  
Scattered,  
Non-linear.

# Brand is Highly Influential in School Selection

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



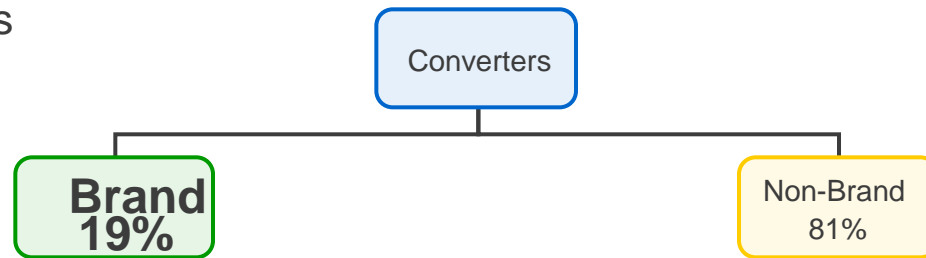
Even more so for students planning to apply to a for-profit school (78%).

# 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.

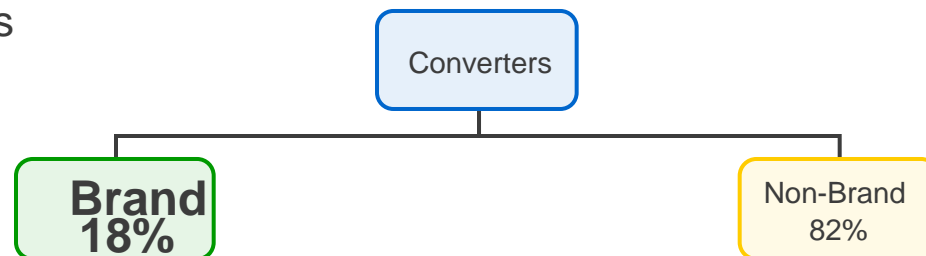
Query Path of Converters  
2010

Query 1



Query Path of Converters  
2009

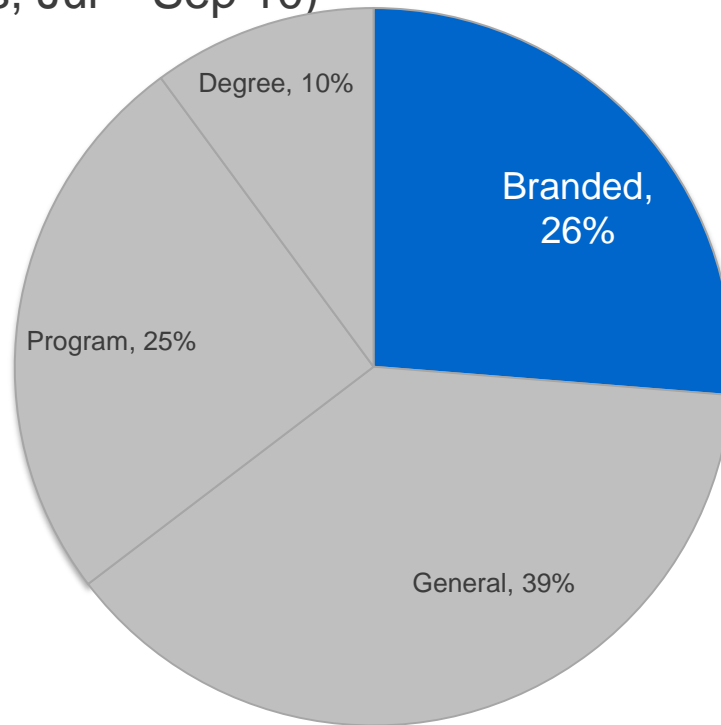
Query 1



# 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)



| 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     |

# Ad Interactions Guide Perceptions, Decisions

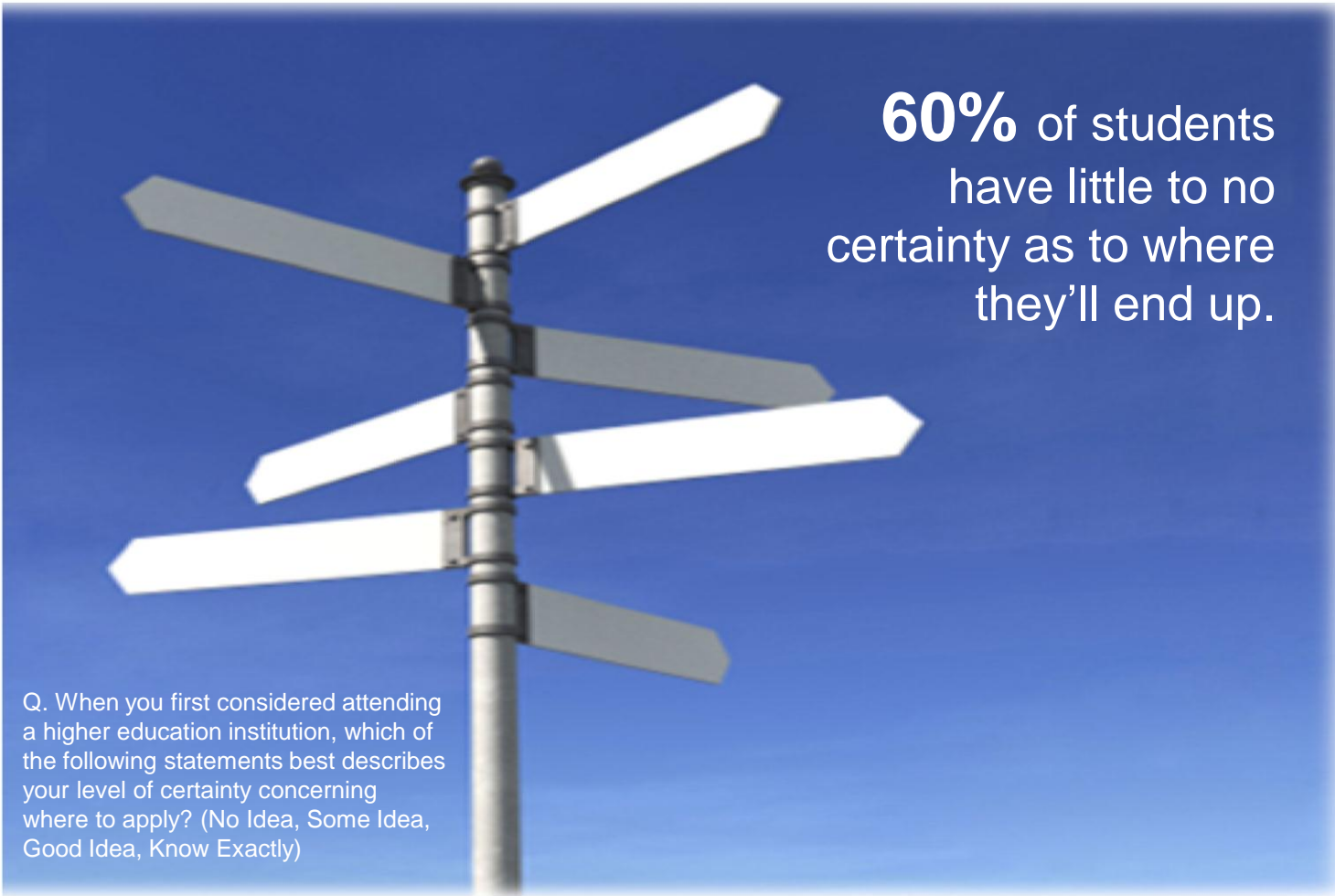


Of those who applied to schools not in their original consideration set, nearly half (47%) found internet ads to be very helpful in making their decision.

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.



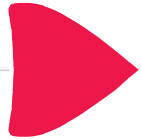
# The Conversation is Yours to Steer.



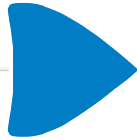
**60%** of students have little to no certainty as to where they'll end up.

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)

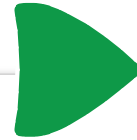
# The New Reality for eduSearchers



eduSearchers  
are More  
Informed, But  
Converting  
Less.



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



Edu Decision  
Paths are  
Scattered,  
Non-linear.

# 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

# eduSearchers Initiate Their Research Early On

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

% of  
Converters  
Referred by  
Search

100

76% 30-120 days out

50% 60-120 days out

80

60

40

20

0

29

21

26

24

100

90-  
120

60

30


SAME


Days before Conversion

Total

# 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%  

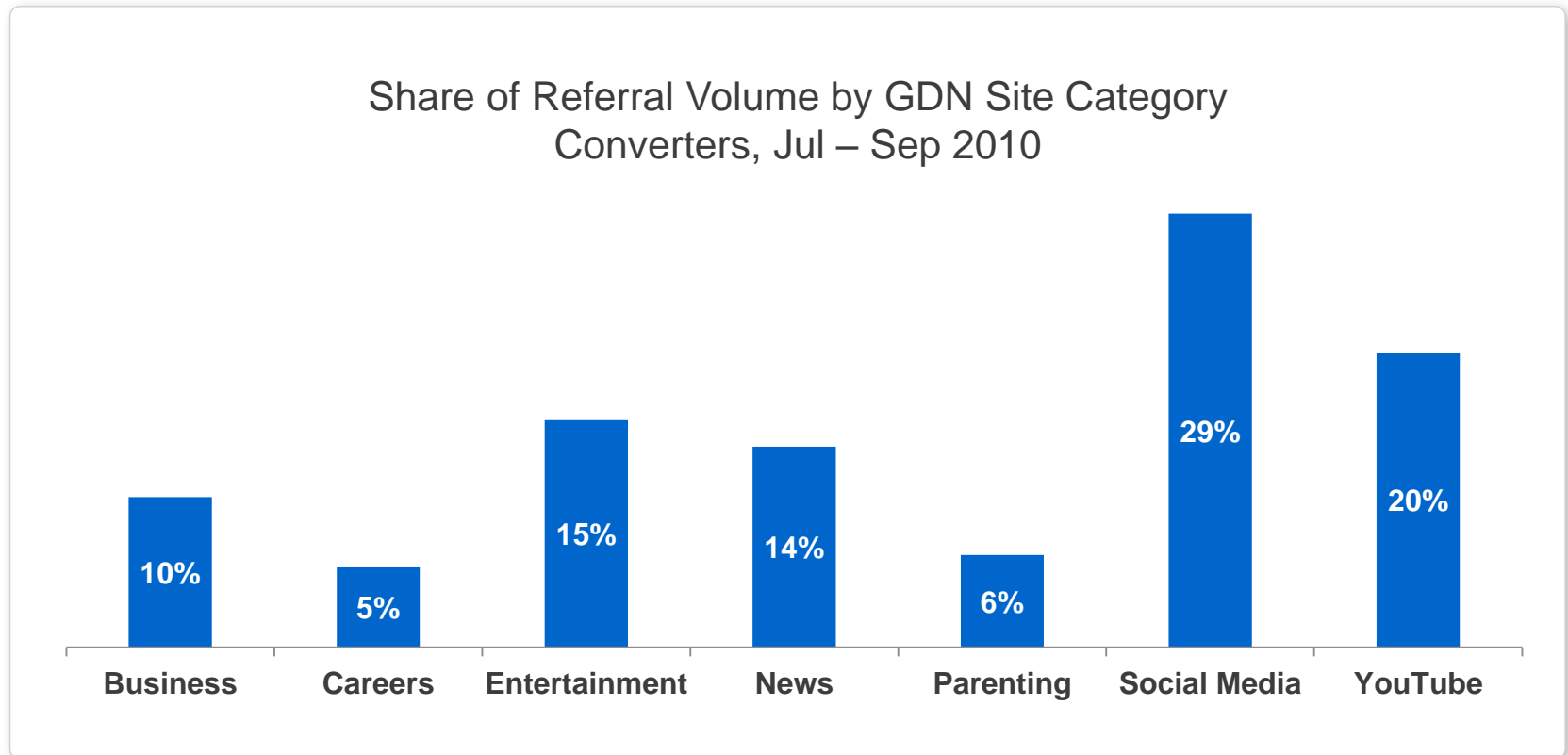

Brochures  
43%  


★★★★★  
Review/Ranking 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.)

# Wide Variety of Sites Consulted Along the Way



# 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)

# 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.

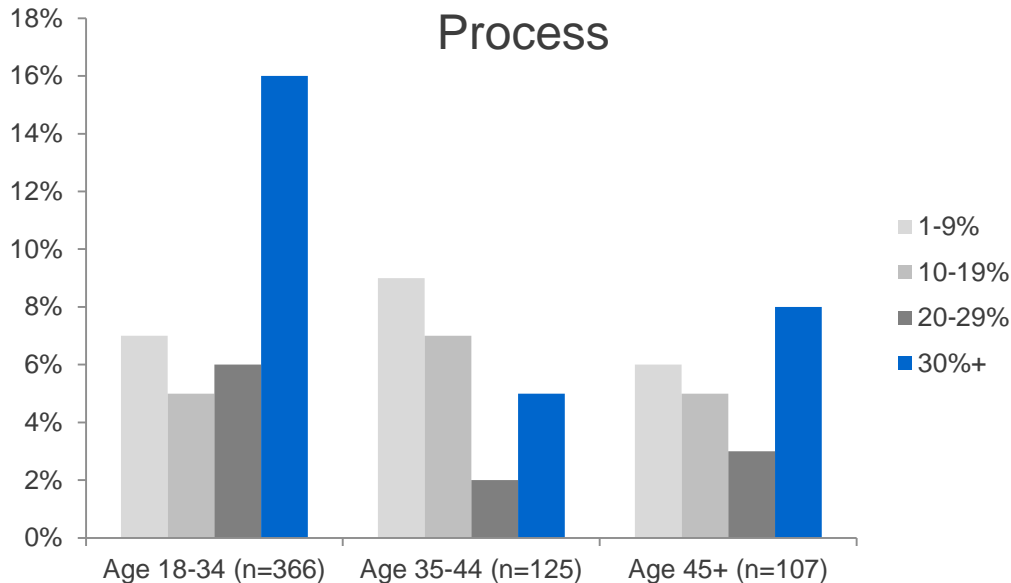




# Nearly 1/3 of eduSearchers Use Mobile Devices

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

Penetration Rate of Mobile Phones in Research Process



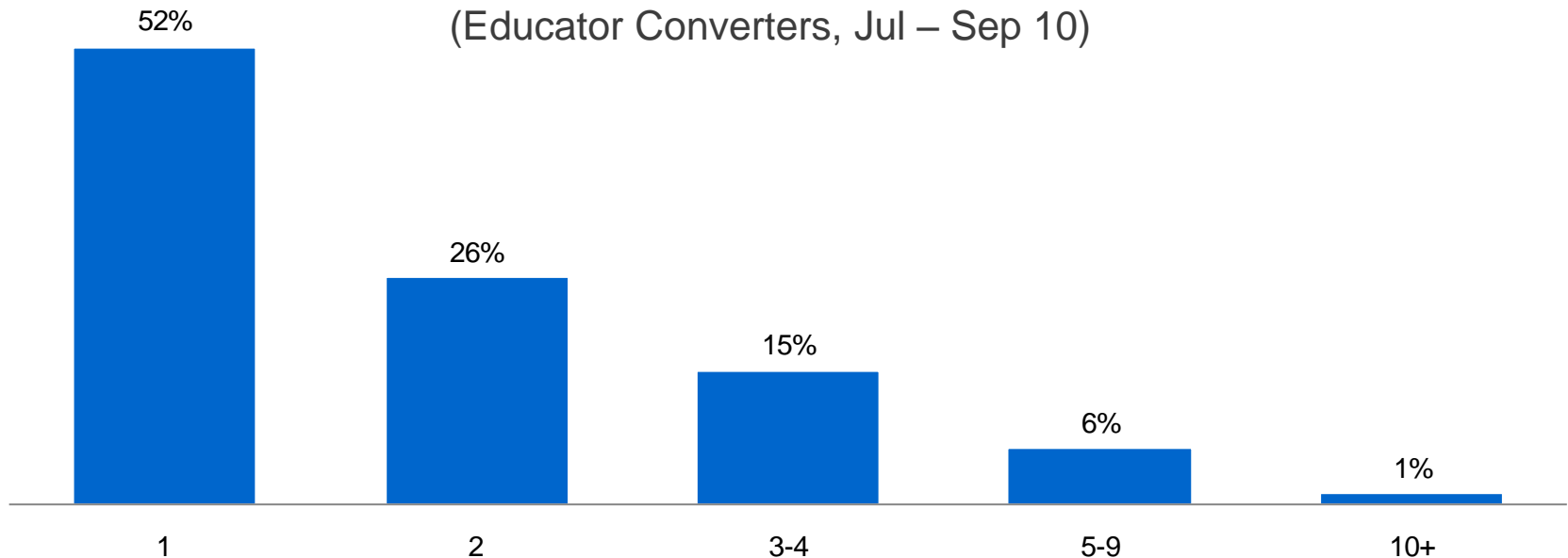
Q. Considering all the time you spent researching higher education institutions, what % of that time did you spend using your mobile phone for research purposes? Please select one answer only. (n=618)



# 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)



# 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.

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

thinkinsights  
with Google™

[www.thinkwithgoogle.com/insights](http://www.thinkwithgoogle.com/insights)