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The Education Research & Conversion Process, from a Search Perspective

Google/Compete
U.S., Jan 2009

Agenda

1 Background, Objectives and Methodology

2 Key Findings: Search's Role for Education Marketers

3 Key Findings: The Online Research Process for Education

Background and Objectives

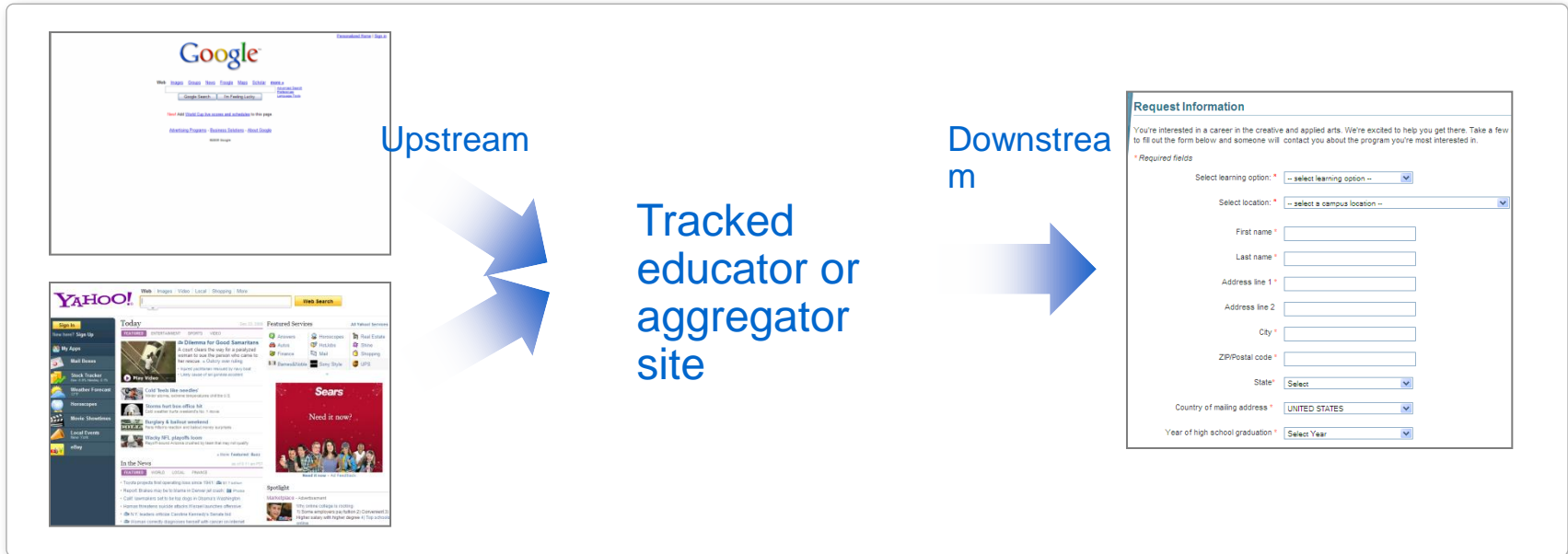
Background

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

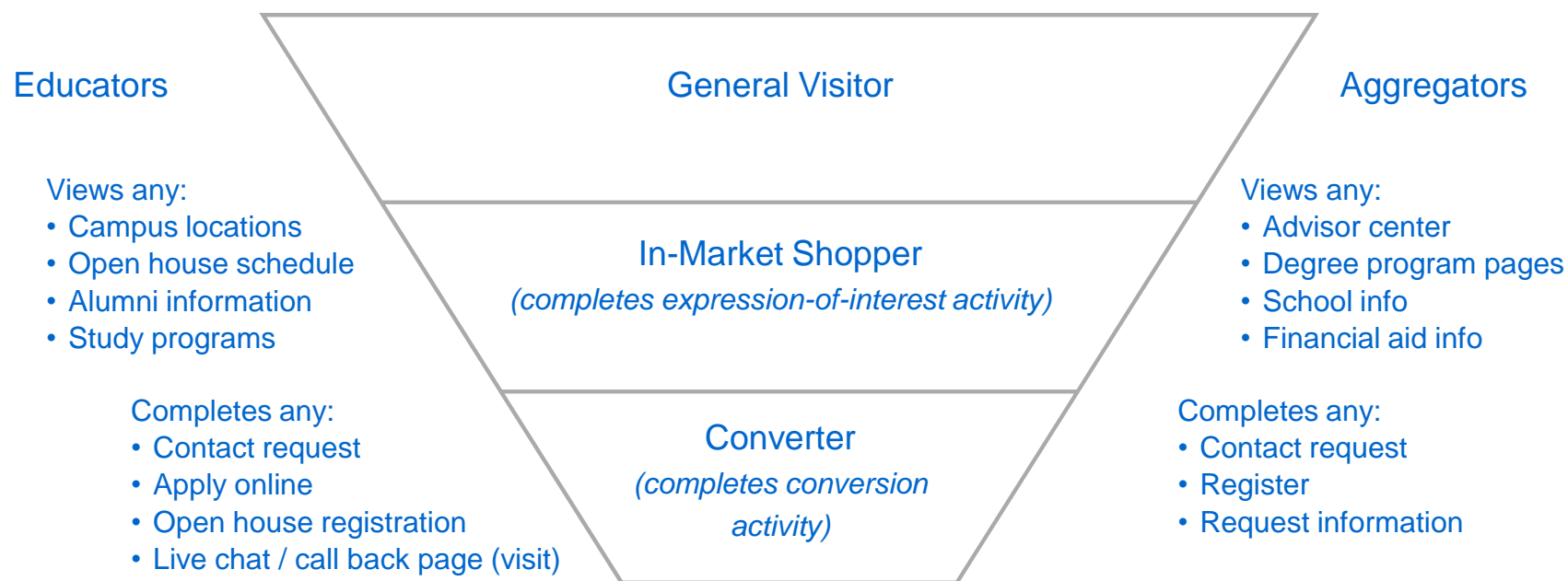
Methodology



- 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

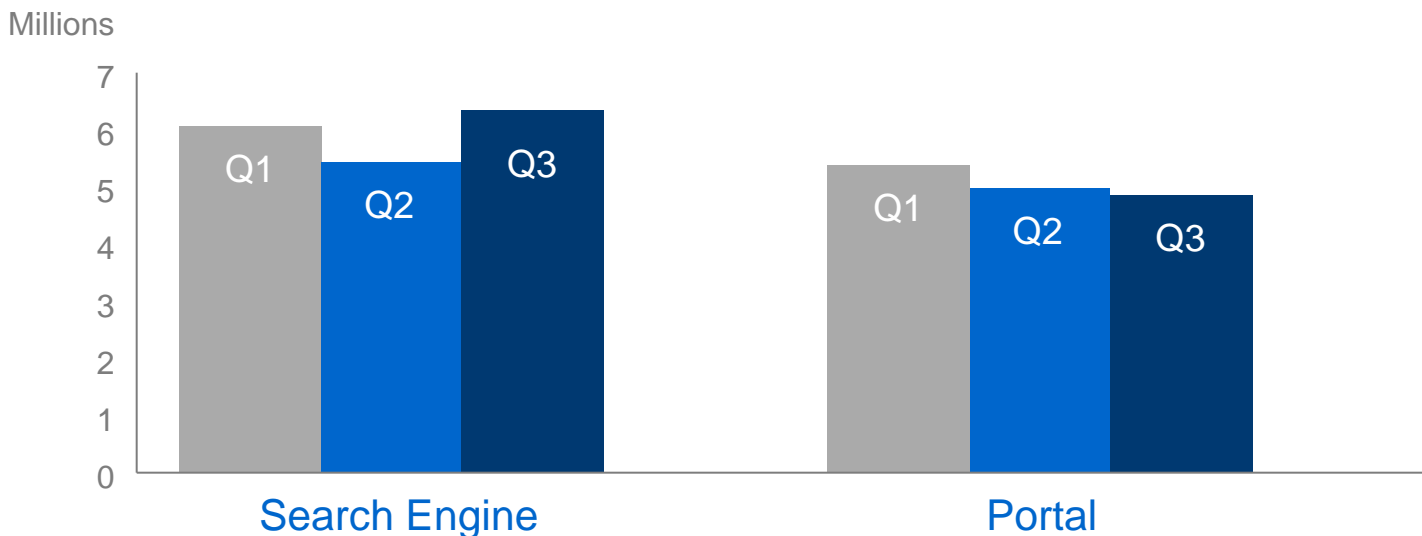
Search's Role: Summary of Key Findings

- 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.

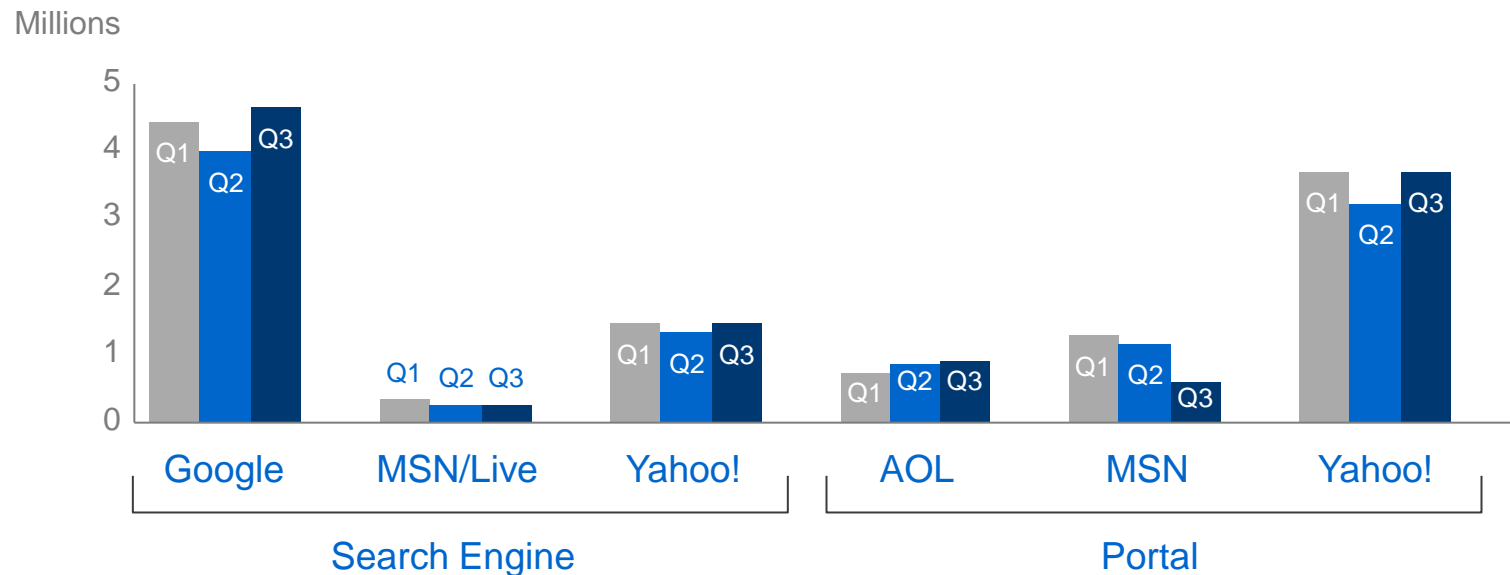
Source of Unique Direct Visitors to Education Sites



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

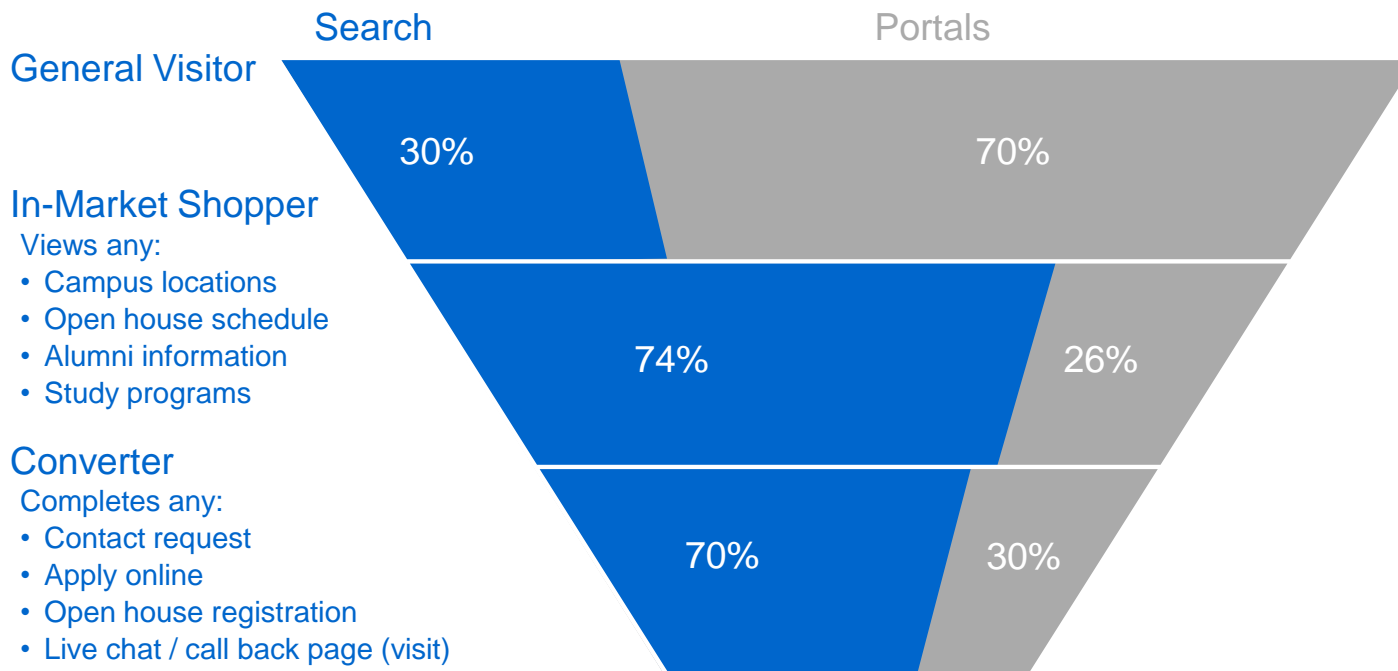


Search Delivers High Quality Traffic to Educators

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.)

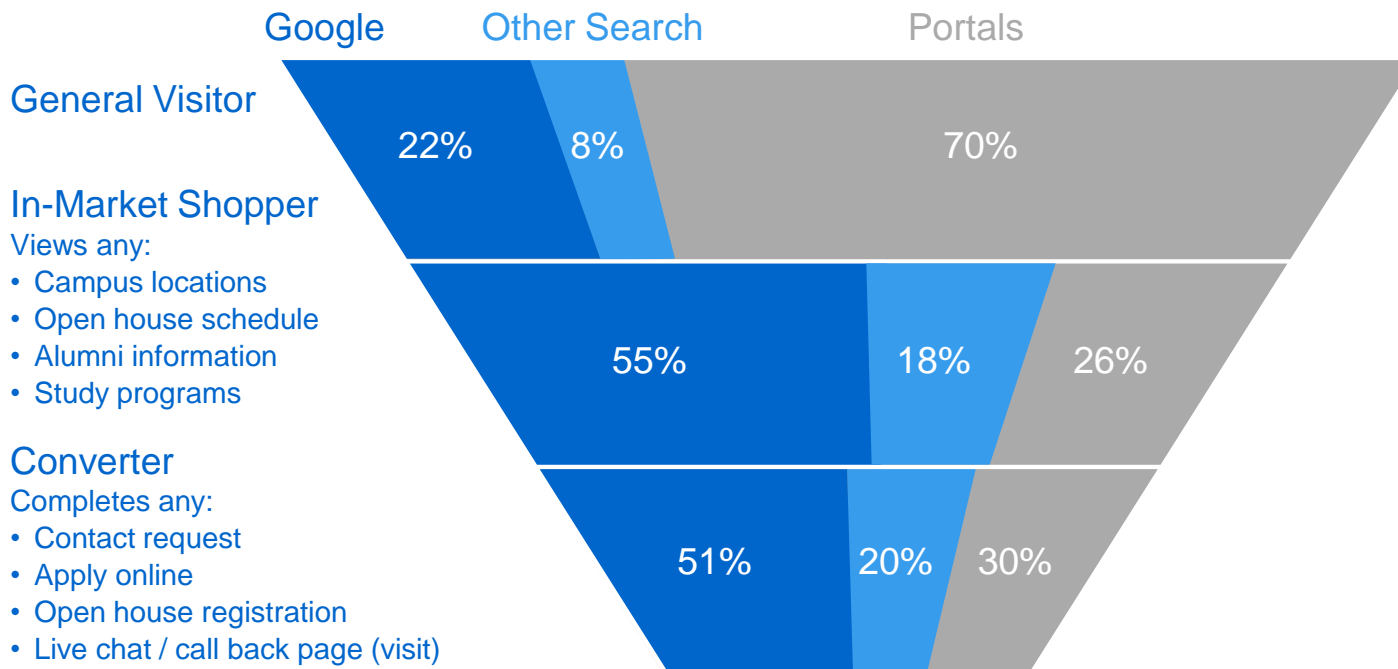


Google Leads Among Search Players

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

Sources of Visit to Educator Sites

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

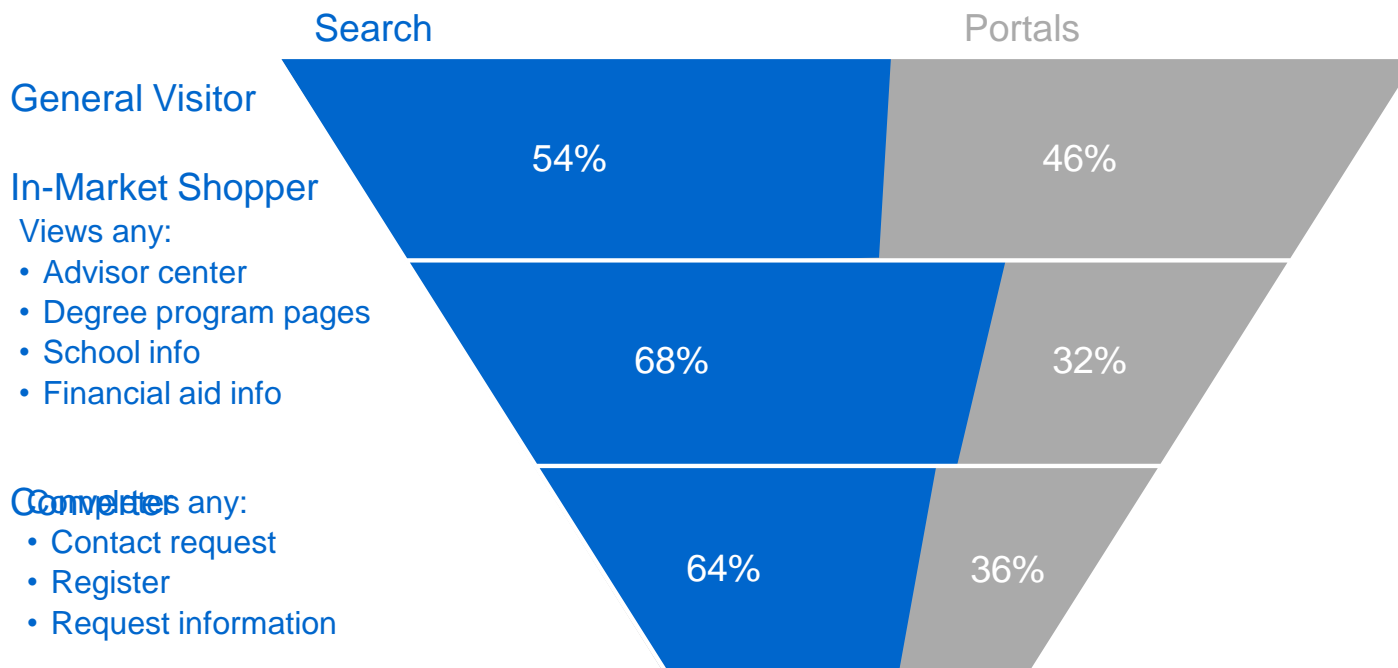


Search Is Important to Aggregators Too

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.)

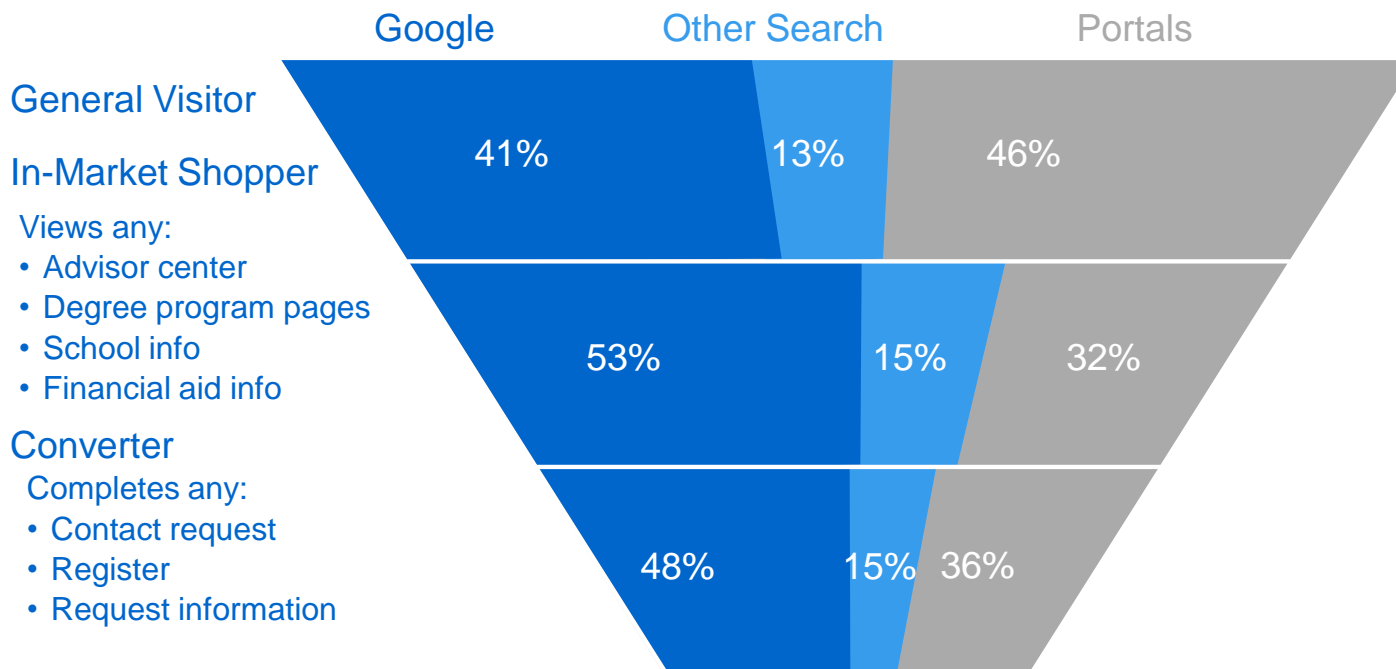


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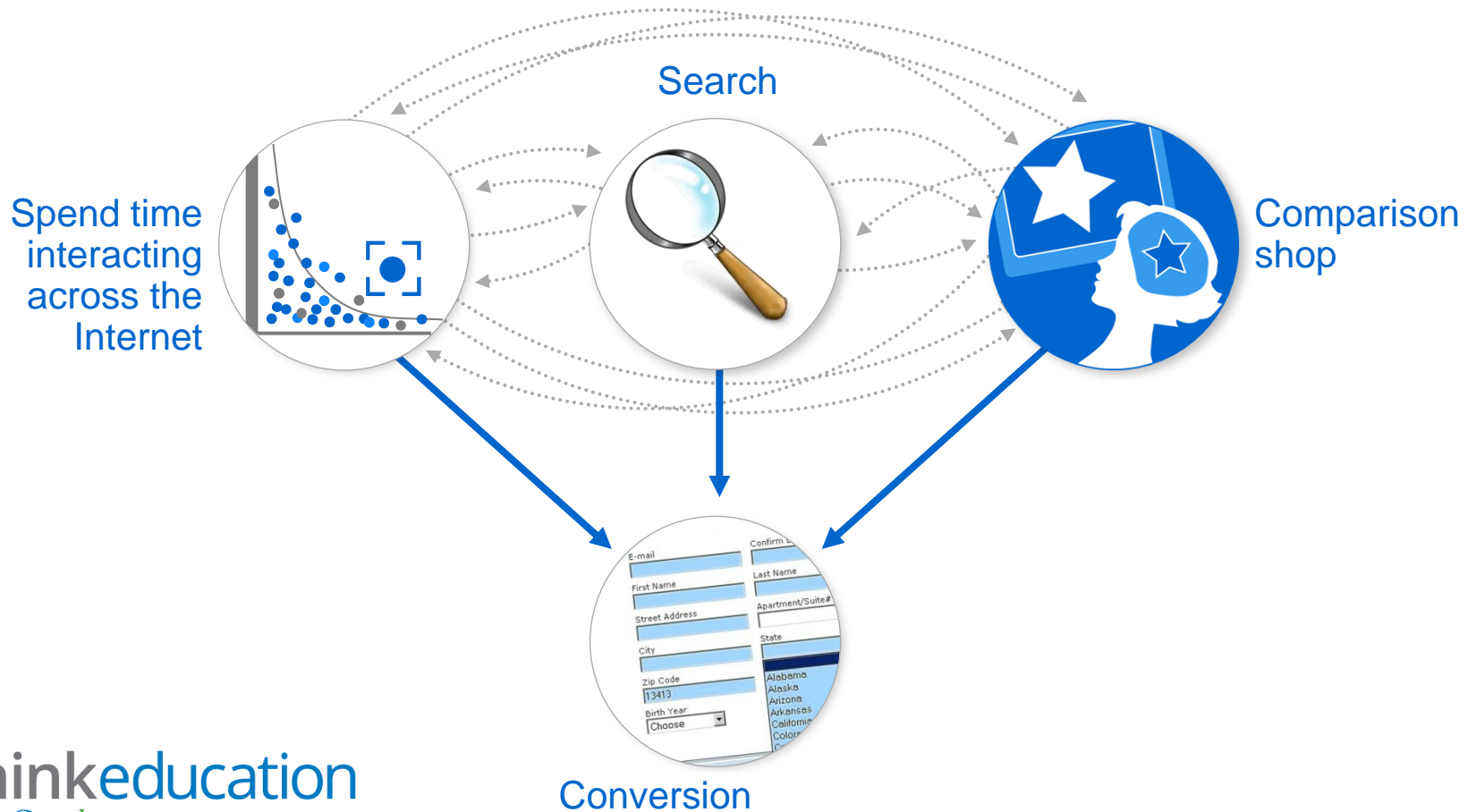
The Online Research Process for Education

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.



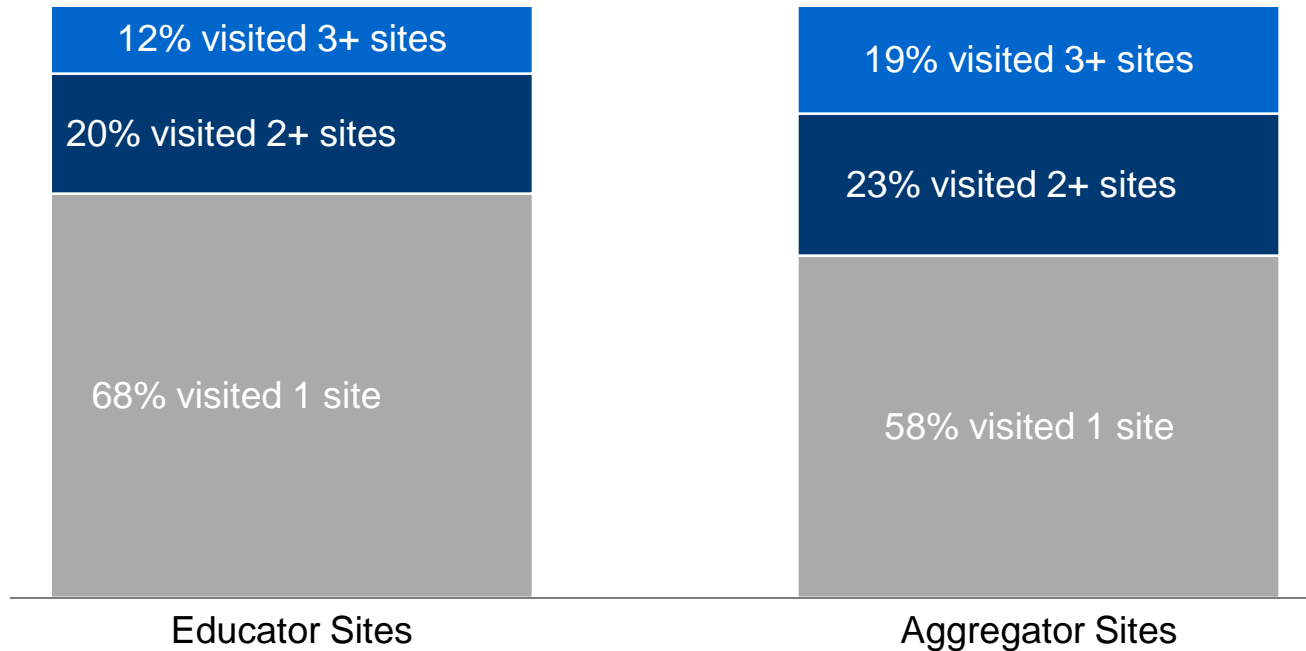
68% of search engine users who click do so on the first page of results.

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.)

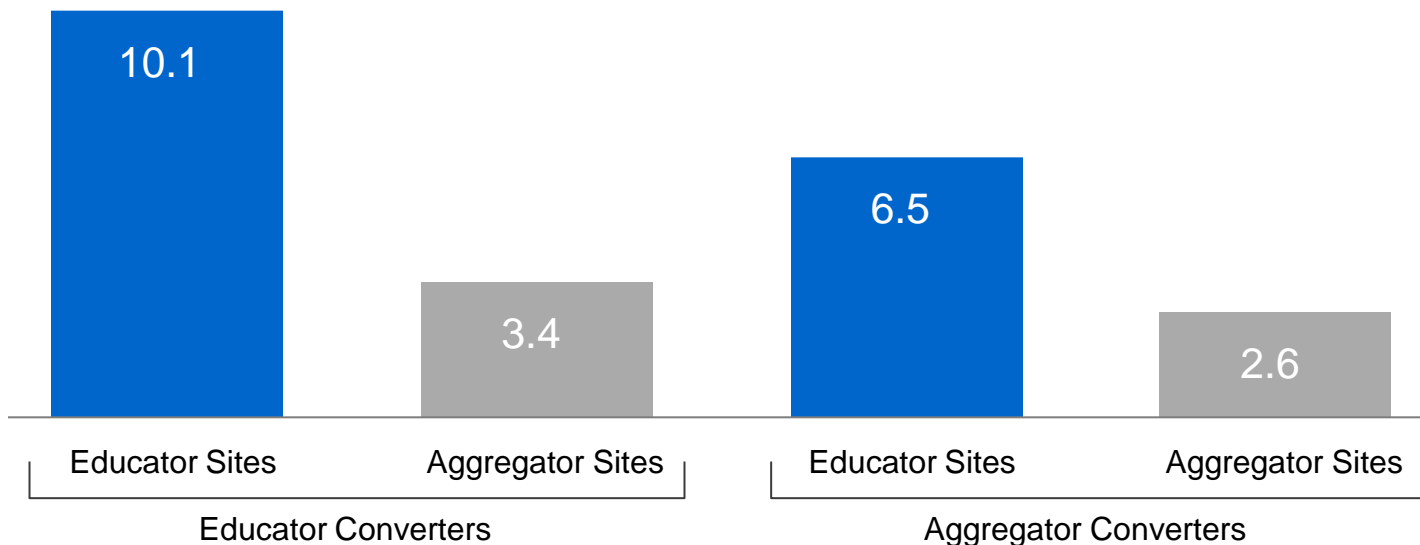


Comparison Shop: Converters make multiple site visits

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

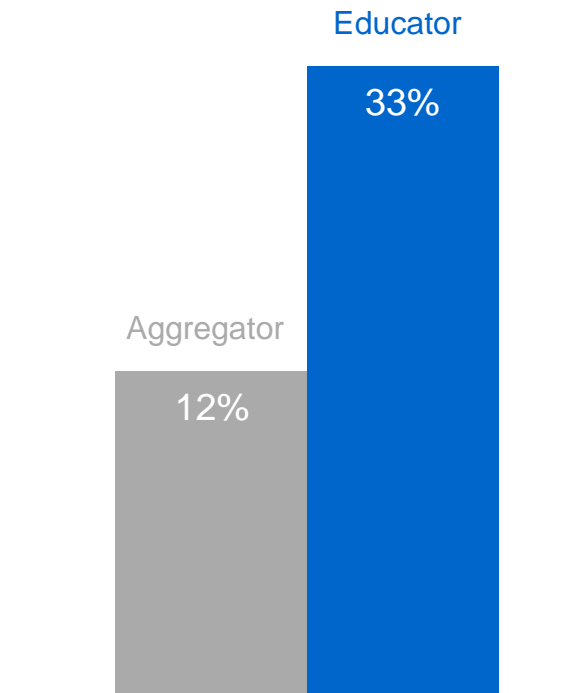
Converters Same Session Visitation to Google Content Network Channels

(May – September, 2008)

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

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)



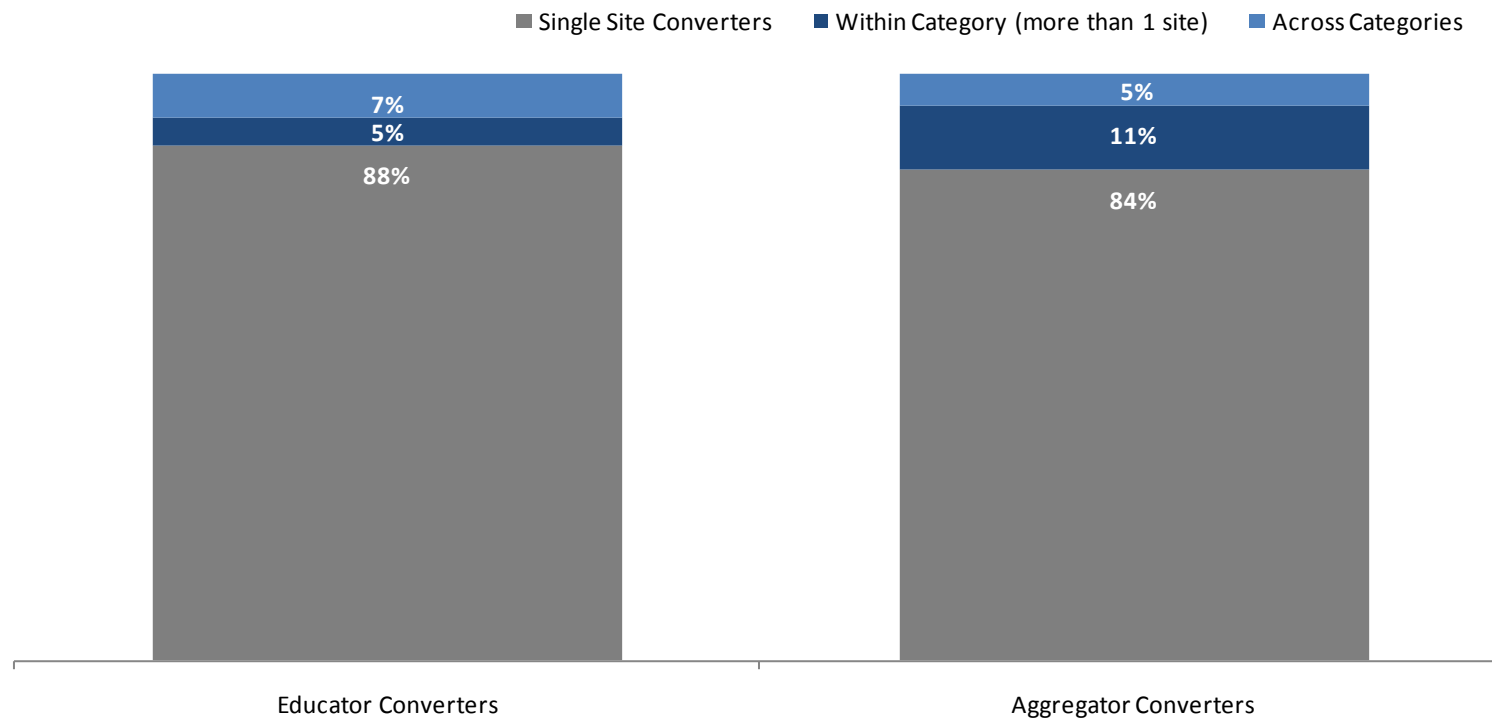
- Converters are 71% more likely than the general U.S. population to visit YouTube
- YouTube is the #1 video site among college students
- Example: 400,000+ videos available for “university”

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

1

Search occurs early, as much as 4 months before conversion.

- Search may be even more valuable in driving conversions than you think.
- Launch search campaigns for new programs and courses of study early.

2

More than half of searchers find the info they need after one search.

- Ensure you are part of the consideration set by running always-on search campaigns.

3

Comparison shopping among education websites is high.

- Consider incorporating rich media and online video to help your site stand out and drive stickiness.

4

The Google Content Network includes channels with high reach among converters.

- Reach in-market shoppers via GCN sites.
- Build engagement with display, text and video ads on relevant content sites, including YouTube.

5

Aggregator converters are more likely to convert on more than one site.

- Focus on providing unique value on your site to reduce duplicate conversions
- Understand how your clients track duplications

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