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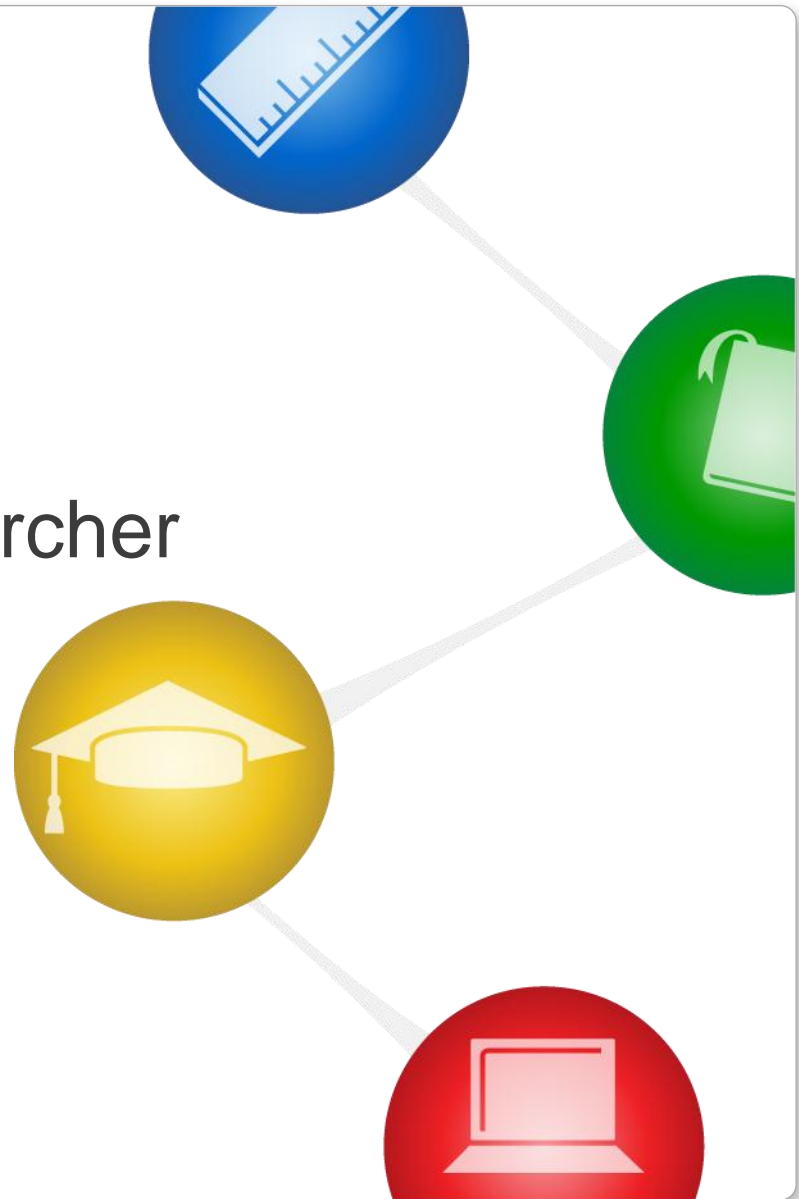
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Engaging the eduSearcher in a New Reality

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	

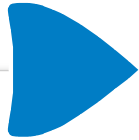
Aggregator Sites

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

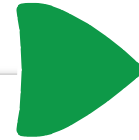
The New Reality for Engaging the eduSearcher



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



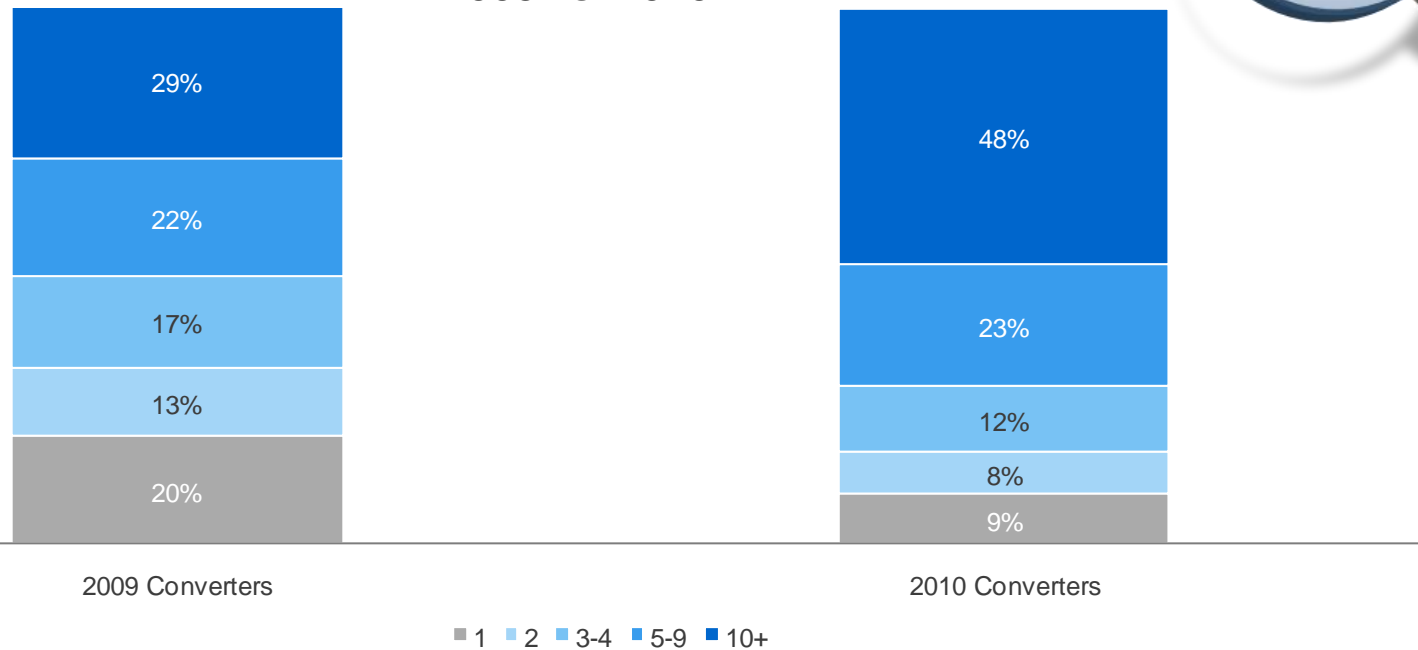
Unique visitors to
Education sites grew
40% year over year.

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

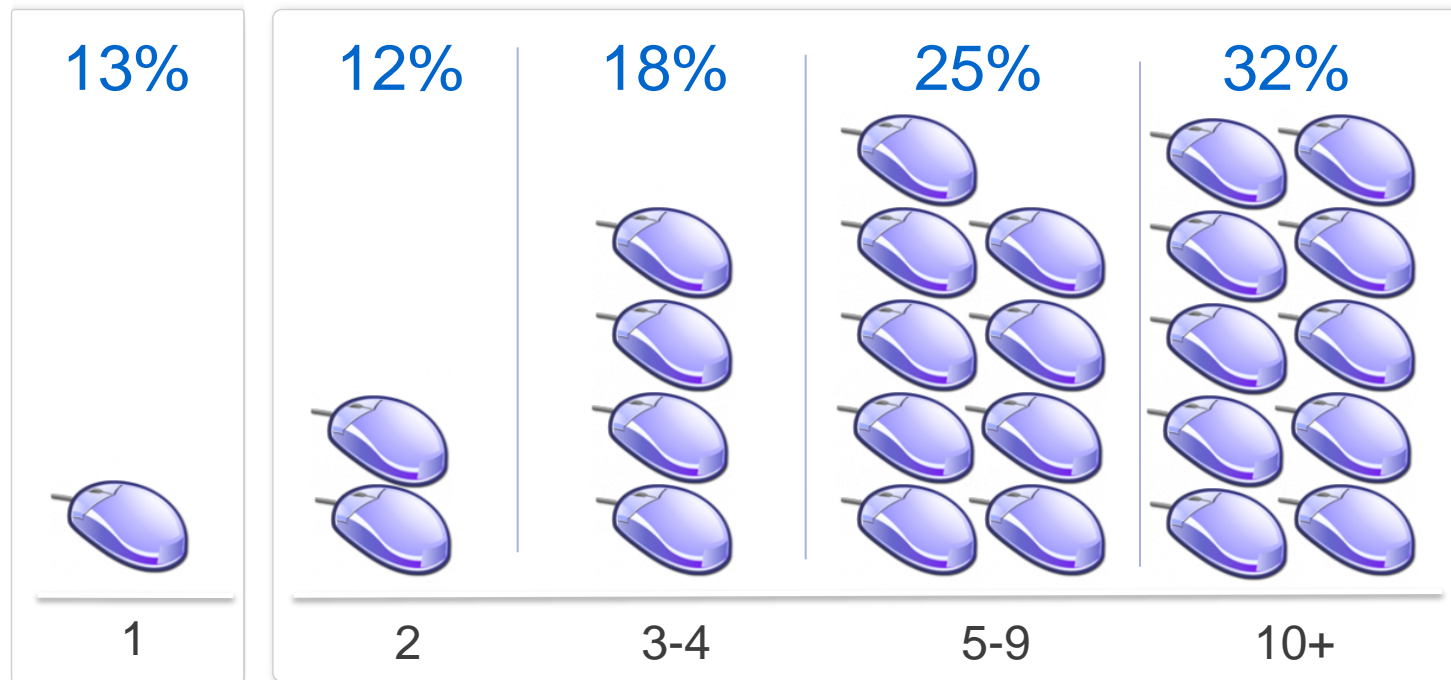
17% are referred
10+ times



One Brand Site Visit Just Isn't Enough

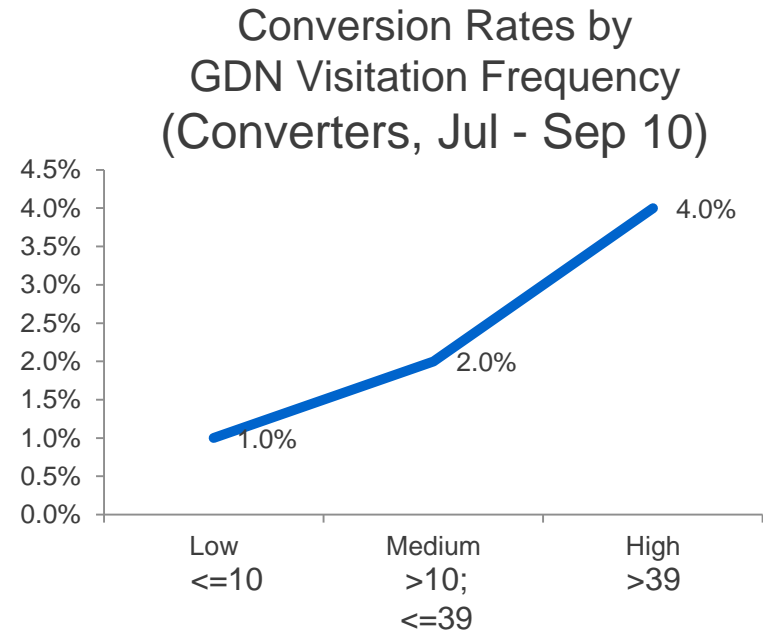
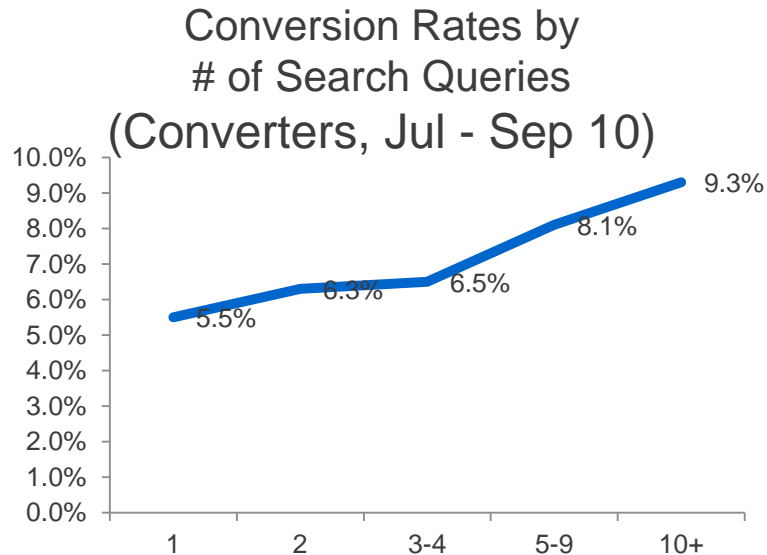
87% of converters visit an education site
at least twice before converting

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



More Research Means More Likely to Convert

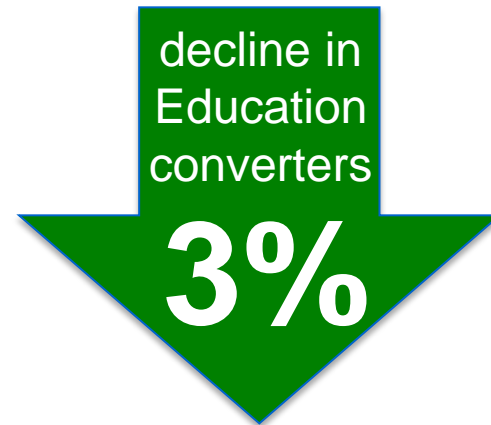
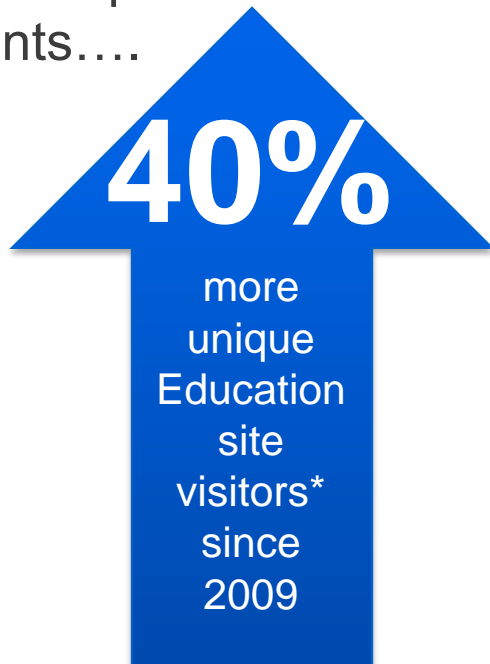
As online research increases,
conversion rate grows as well.



However, Fewer eduSearchers are Converting

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

More Prospective Students....



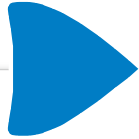
...but Fewer Taking Action

*Includes both Educator and Aggregator site visitors

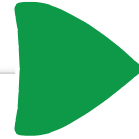
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What's in a
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Edu Decision
Paths are
Scattered,
Non-linear.

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



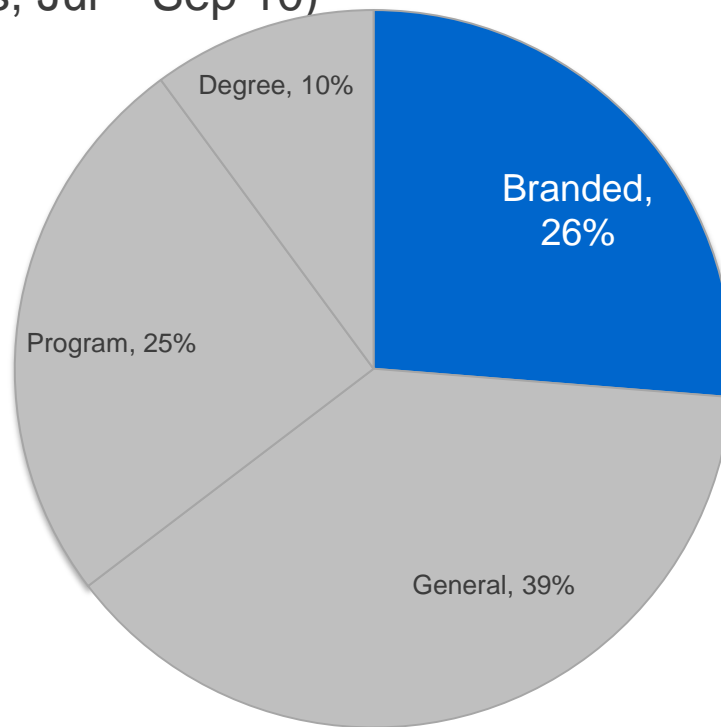
Query Path of Converters
2009



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

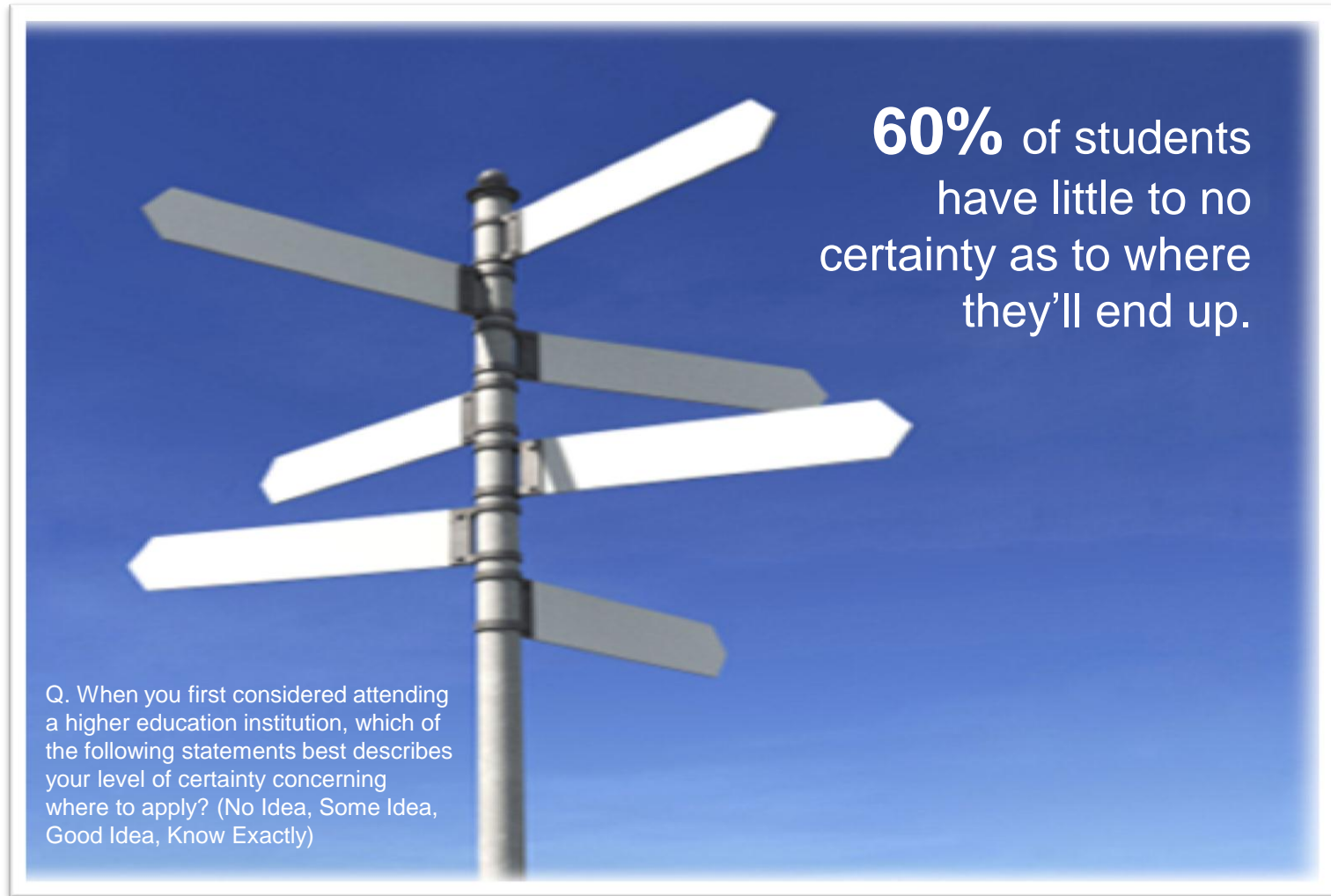
Ad Interactions Guide Perceptions, Decisions



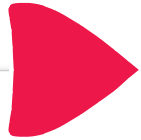
Of those who applied to schools not in their original consideration set, nearly half (47%) found internet ads to be very helpful in making their decision.

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.

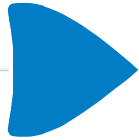
The Conversation is Yours to Steer.



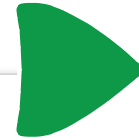
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Search a Main Driver of Education Conversions

-3%

year over year
growth in
education
converters

16%

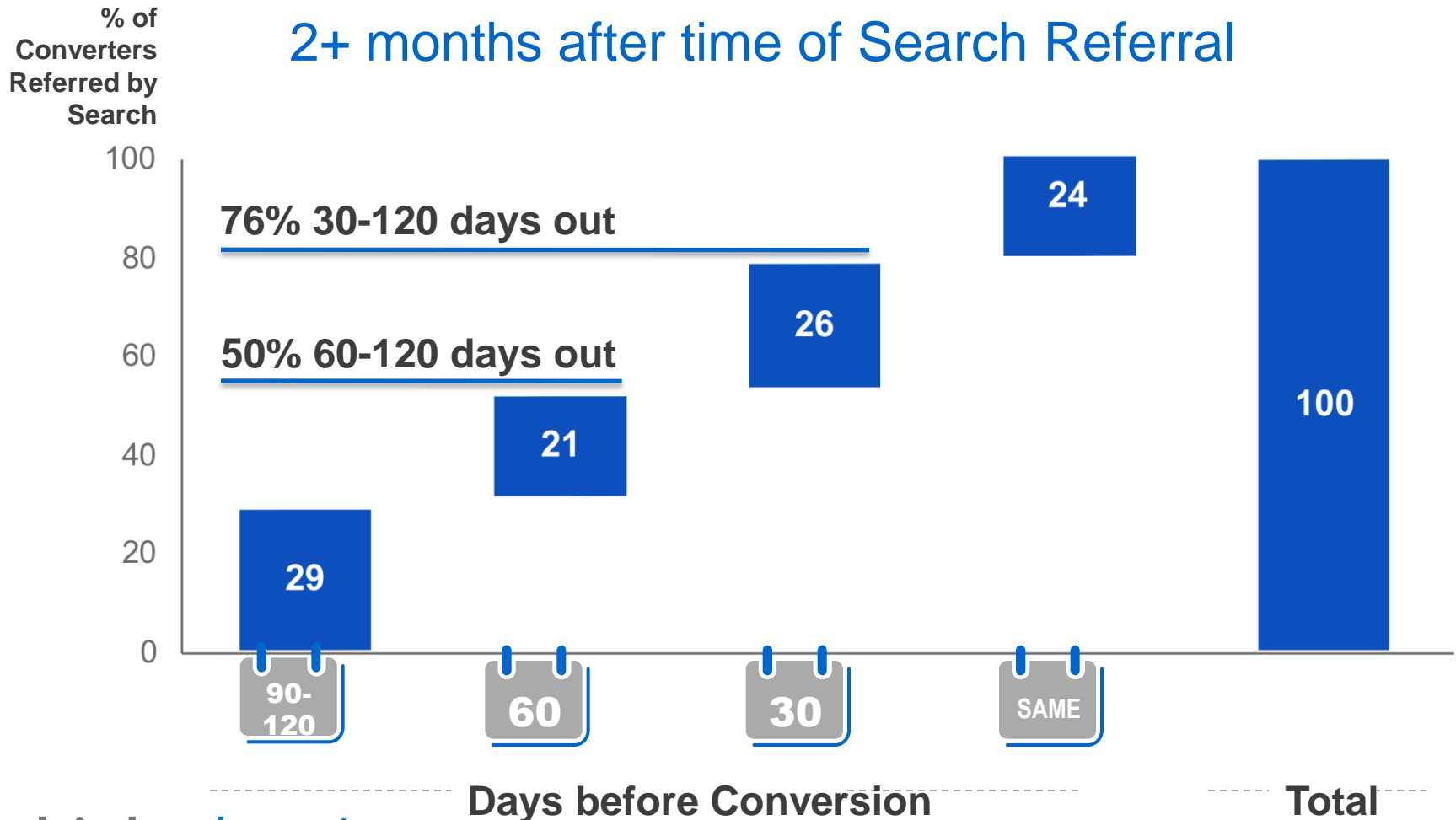
year over year
growth in
education
converters
*referred by
Search Engines*

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



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%

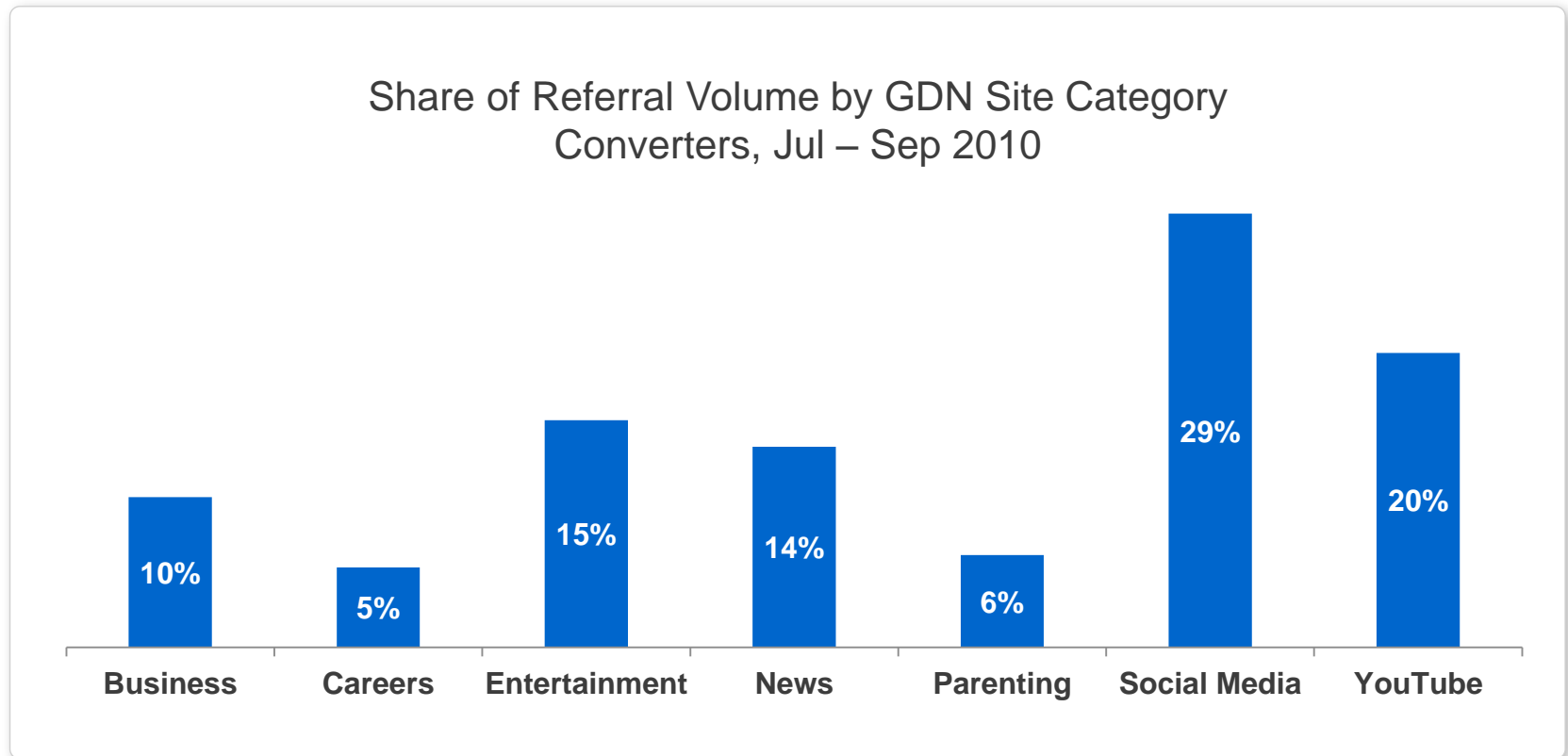

Brochures
43%


★★★★★
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.)

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

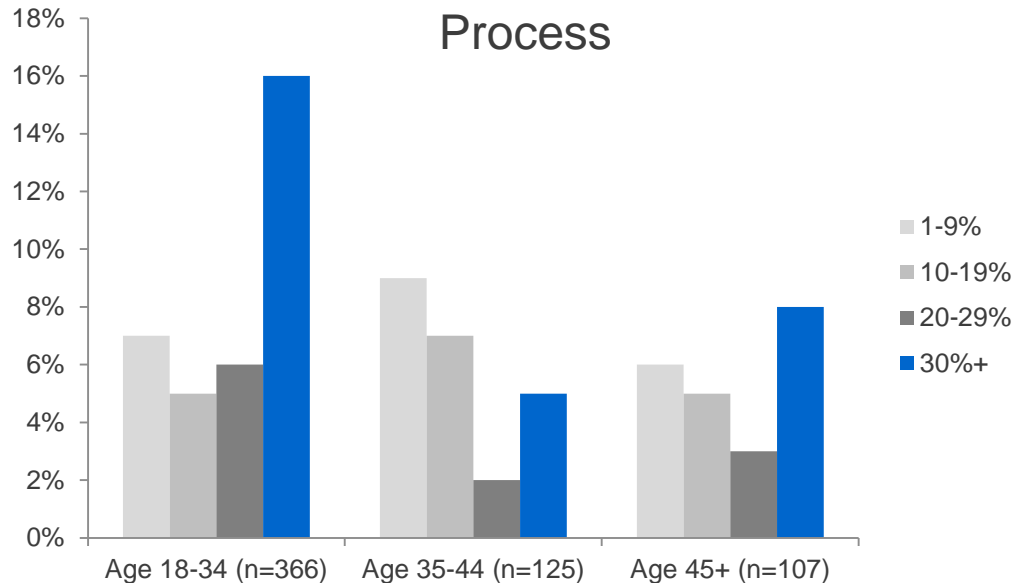
Nearly half (48%) of a school's site visitors who were referred by the school's YouTube brand channel convert.



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

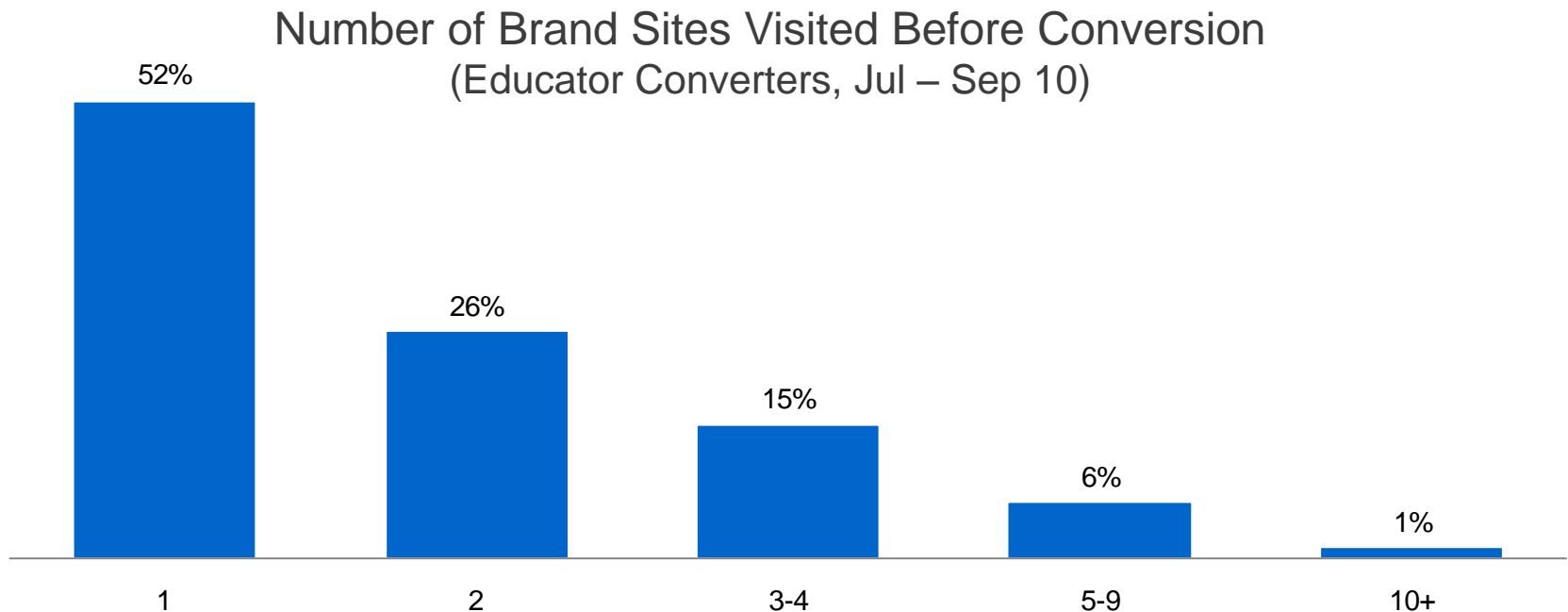


Q. Considering all the time you spent researching higher education institutions, what % of that time did you spend using your mobile phone for research purposes? Please select one answer only. (n=618)



To Make the Short List, Early Touchpoints Critical

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



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.

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