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Education Trends through
the Eyes of Your Customer
Tracing the Learner's Digital Journey

Sources Used

Education Clickstream Study

- Compete, Q3 2011

Google Search Data

Education Brand Perceptions Study

- Ipsos OTX, Q3 2011

Methodology

Google Search Data

Education Clickstream Study (Compete, U.S., Q3 2011)

- Used 2M-person panel to analyze education website visitation, engagement
- Conversion events include apply online, register for an open house, request info, contact us, register a profile
- Additional online survey amongst those who researched or applied to a higher education institution in past 6 months, N=680, (Sept-Oct 2011)

Google U.S. Search Data

- Internal search query data, indexed

Education Brand Perceptions Study (Ipsos OTX, U.S., Q3 2011)

- Objective: to understand public perceptions of higher education schools & measure the impact of online advertising on perceptions
- Perceptions measured via online survey, then used test & control groups to analyze impact of online advertising
- n=2,400 US residents (2,000 prospective students, 400 HR decision makers)

Agenda

1. The Online Landscape for Education
2. Tracing the Learner's Journey
3. Implications

In a Fast-Changing World, Education Still in High Demand Online

Indexed Search Query Growth, Q1'10-Q1'12

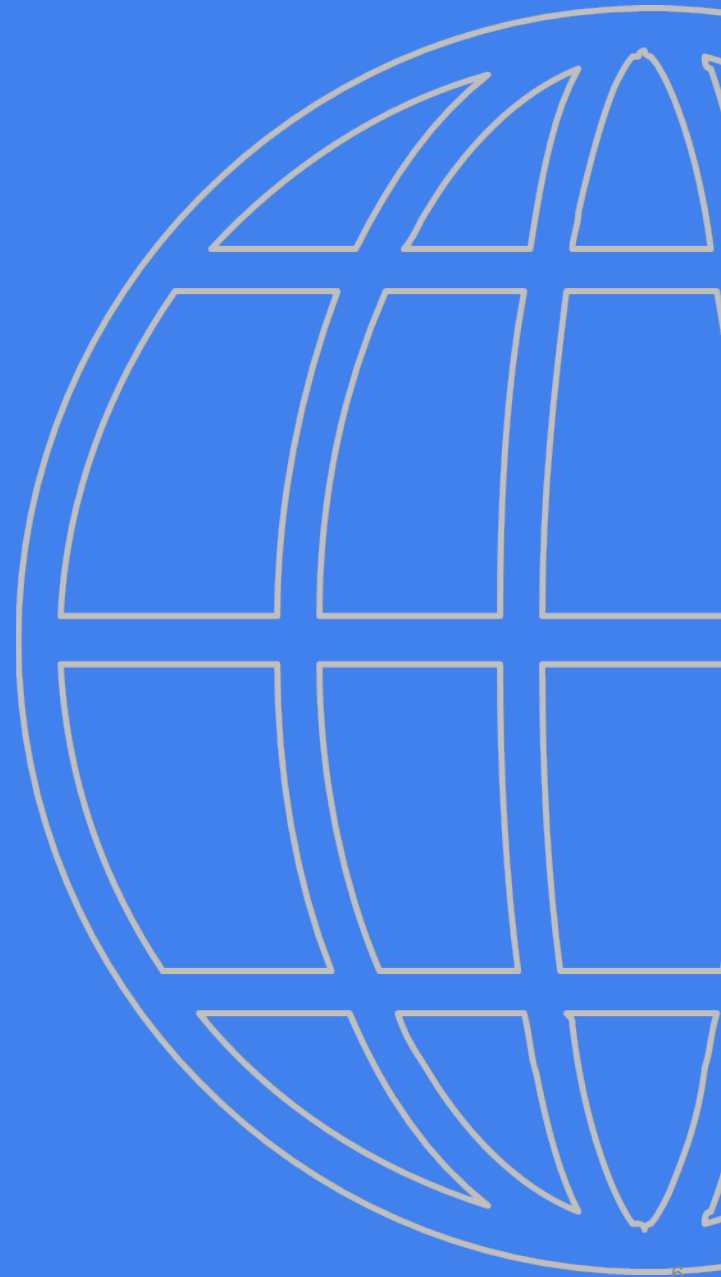


Source: US Education Search Analysis, Google Internal Data, 2012

1 in 4

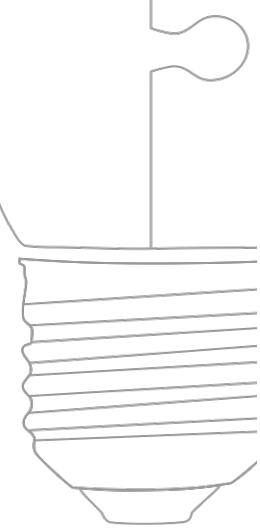
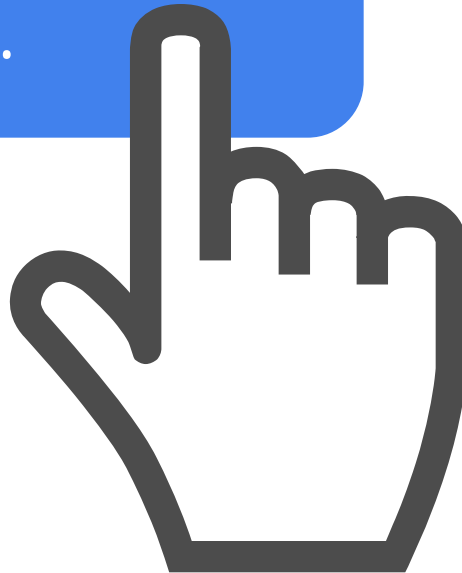
education researchers never look
to sources outside the **Web**.

Source: Compete, Inc U.S. Custom Education Study, Q3 2011



The Web is present at the most critical of moments...

8 out of 10
students apply online.



Source: Compete, Inc U.S. Custom Education Study, Q3 2011

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Demand is slipping
through the cracks...

80% of Education search query
paths end without
a conversion.



Source: Compete, Inc U.S. Custom Education Study, Q3 2011

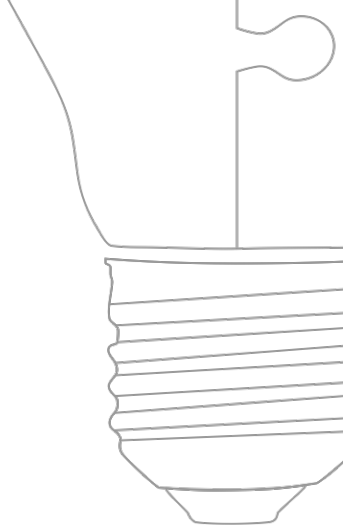


Tracing The Learner's Journey

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8 Elements of the Learner's Journey

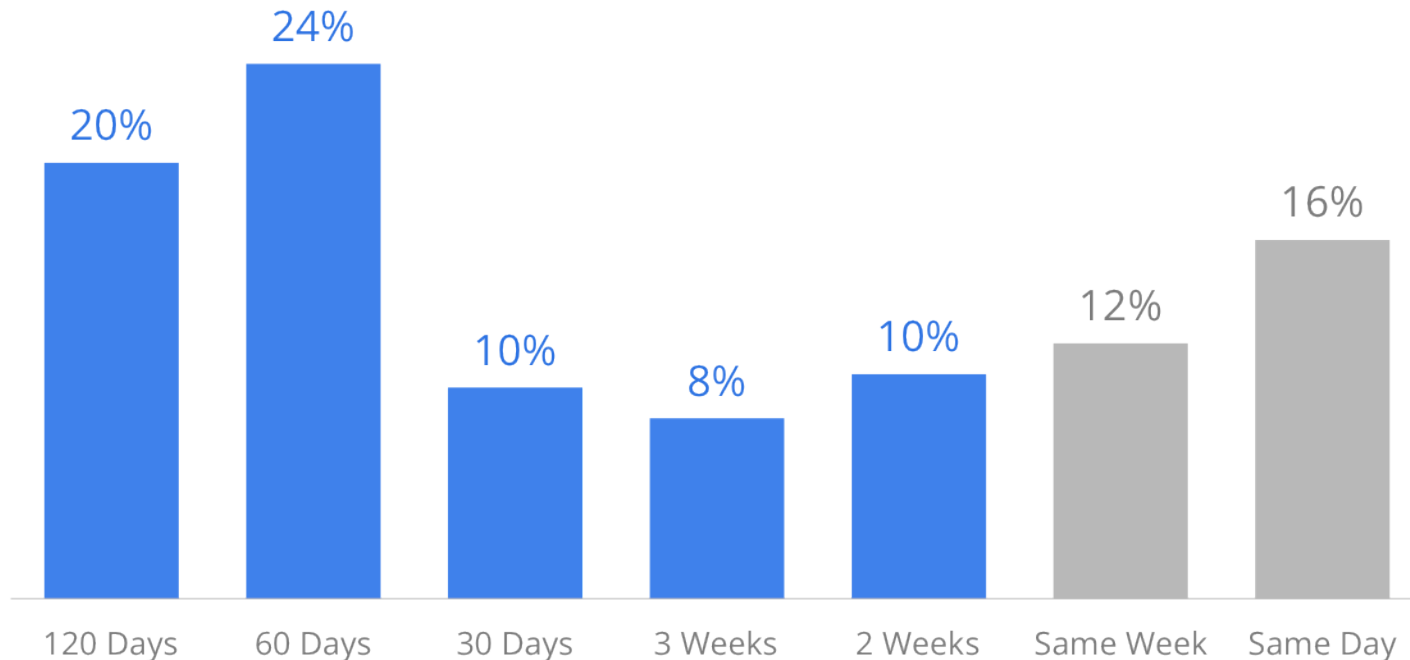
Learners
embark
early on.



Learners First Meet Your Site Long Before Decision Time

Distribution of first visits to brand website

72% arrive at least **2 weeks prior** to conversion.



Source: Compete, Inc U.S. Custom Education Study, Q3 2011

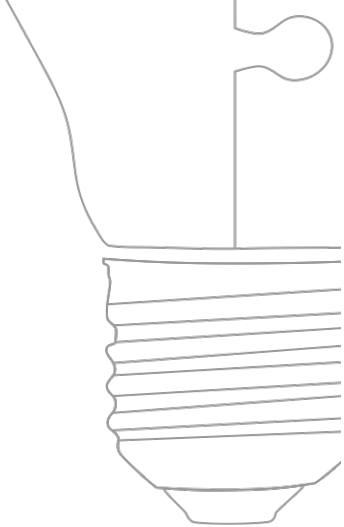
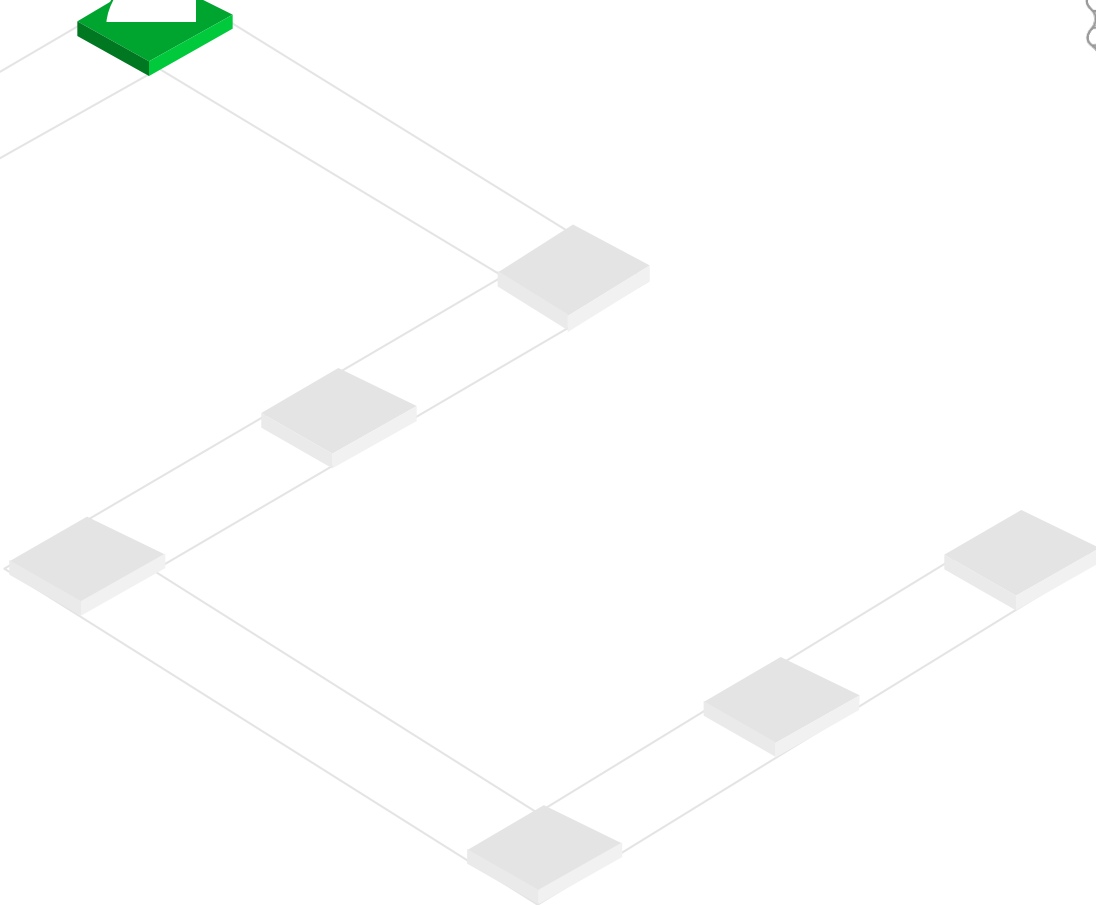
The Learner's Journey

Initially, they seek out general knowledge.

2

Learners embark early on.

1



They Begin with an Open Mind

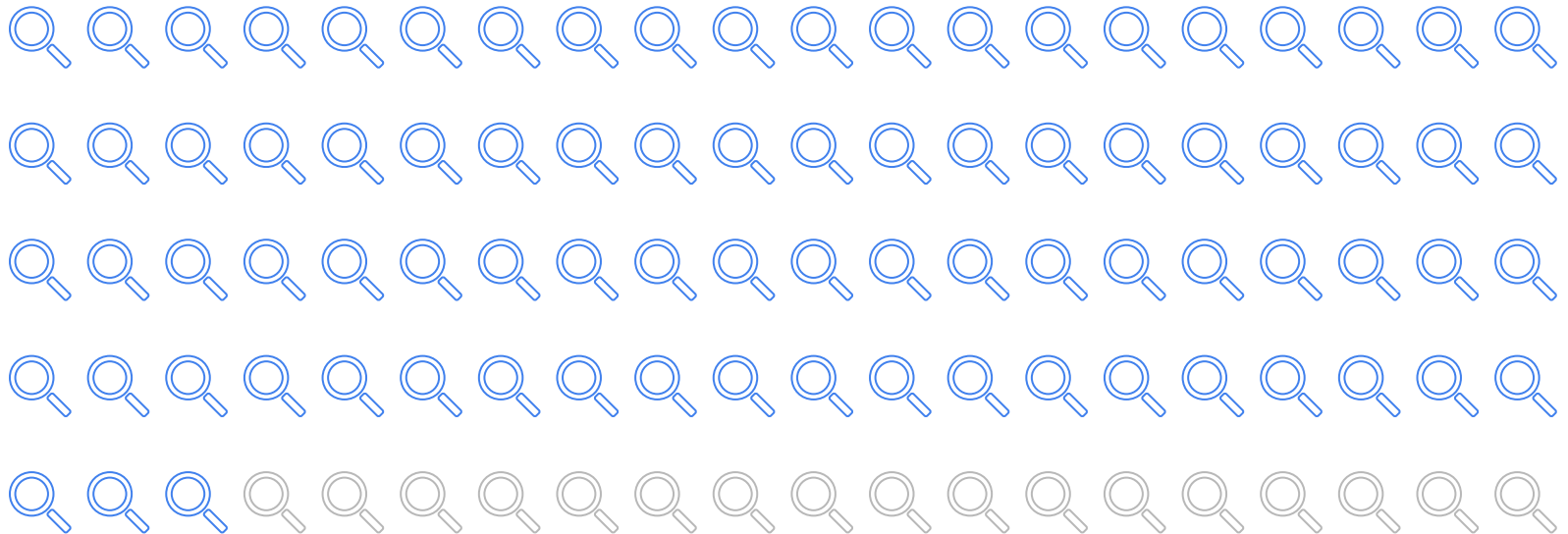
9 in 10

of education **researchers** don't know which school they want to attend as they initiate their journey.

Source: Compete, Inc U.S. Custom Education Study, Q3 2011

They Look to Discover What's Out There

83% of query paths **begin** with a non-branded term.



Source: Compete, Inc U.S. Custom Education Study, Q3 2011

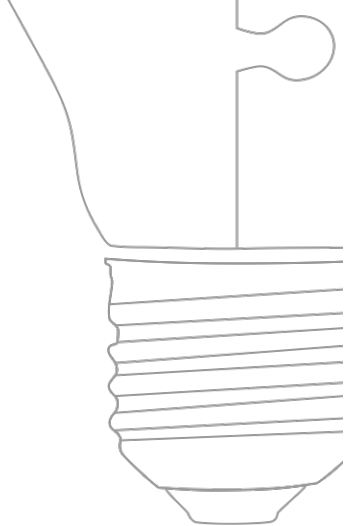
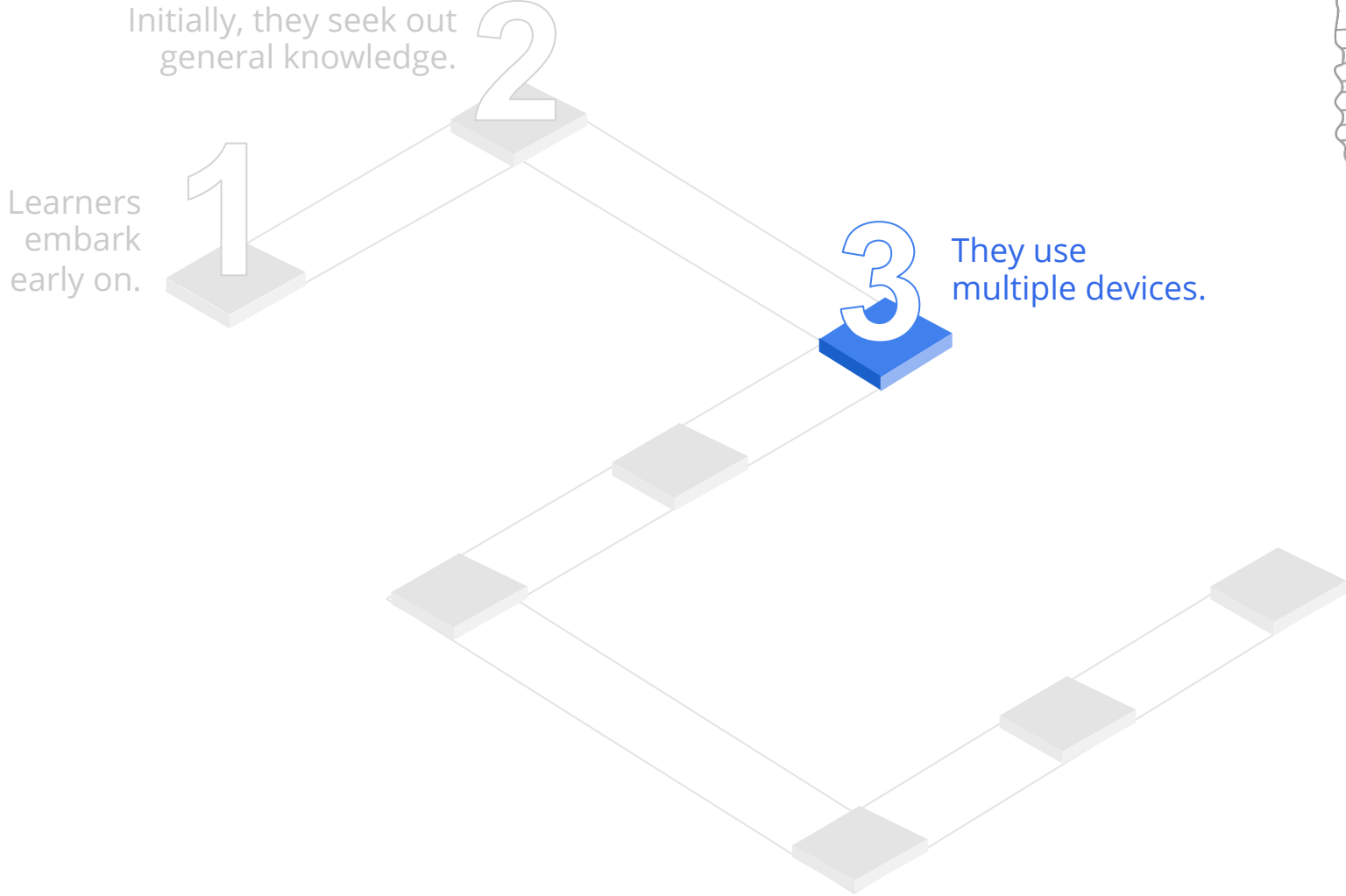
A woman with dark hair, wearing a peach-colored top and white pants, is sitting on a light-colored couch. She is looking at a laptop screen and has her hand near her chin in a thoughtful pose. The background shows a bright room with a window and some indoor plants.

Many Journeys End at This Stage

Most query paths (74%)
end after only
1-2 search queries.

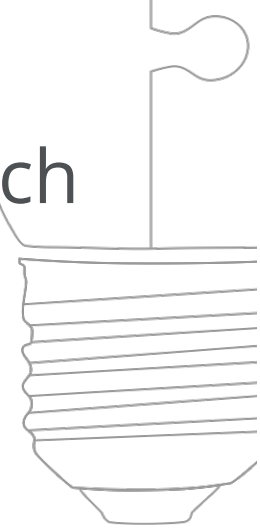
2/3 of these
paths are
non-branded only.

The Learner's Journey

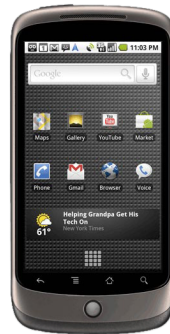


Learners are Adopting a 3-Screen Approach

Which devices did you use to conduct online research on education?



97%



33%



21%

Source: Compete, Inc U.S. Custom Education Study, Q3 2011

Mobile Not Just an On-The-Go Device

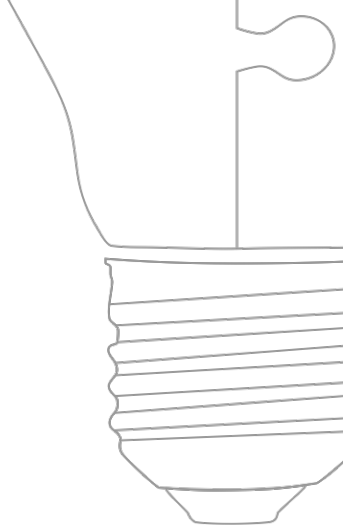
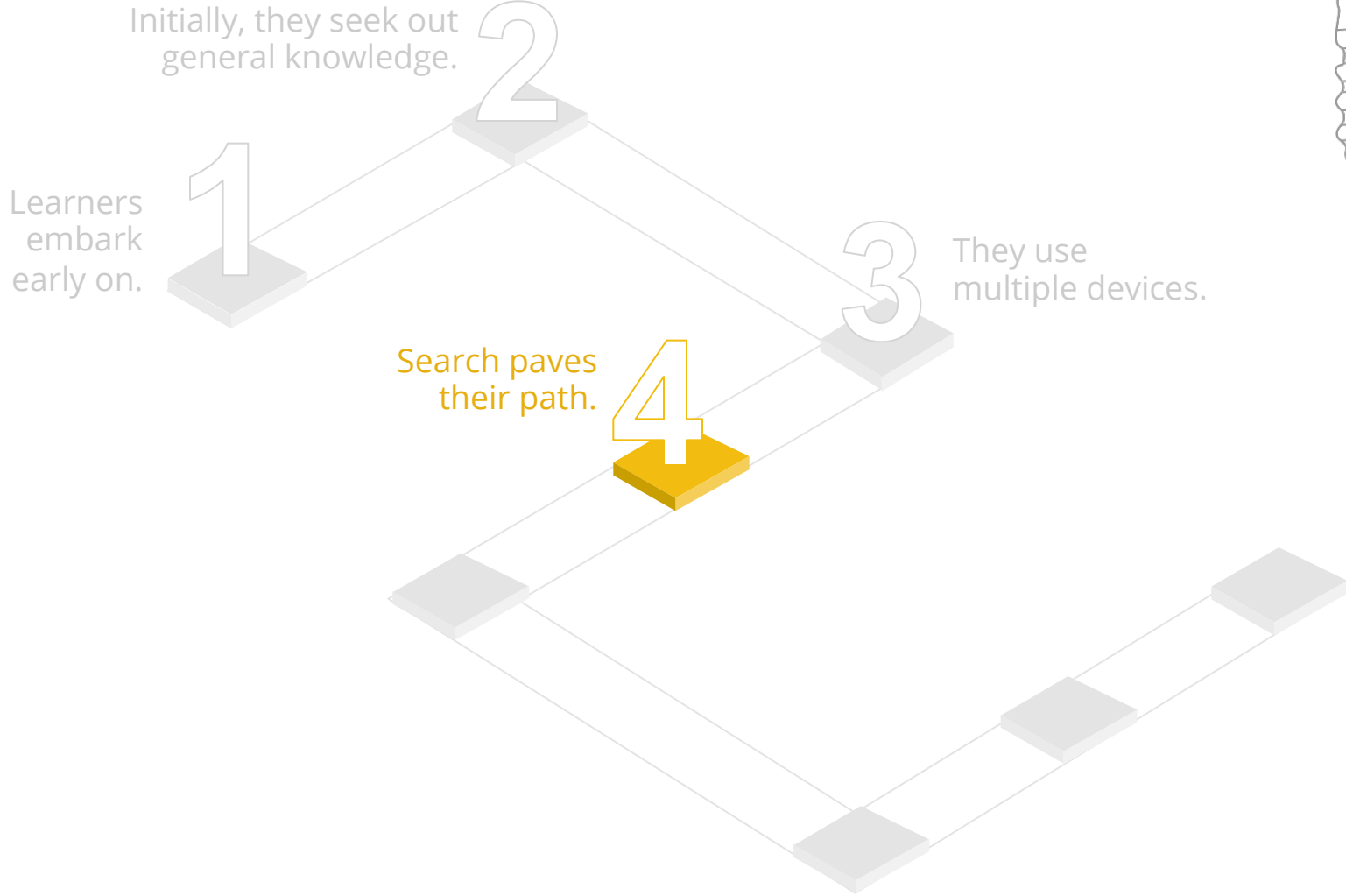
2 in 3

Mobile researchers use their mobile device
at home when researching education.

Source: Compete, Inc U.S. Custom Education Study, Q3 2011



The Learner's Journey



Search is Core to the Journey

78% of converters on education websites are **influenced by Search.**



Source: Compete, Inc U.S. Custom Education Study, Q3 2011

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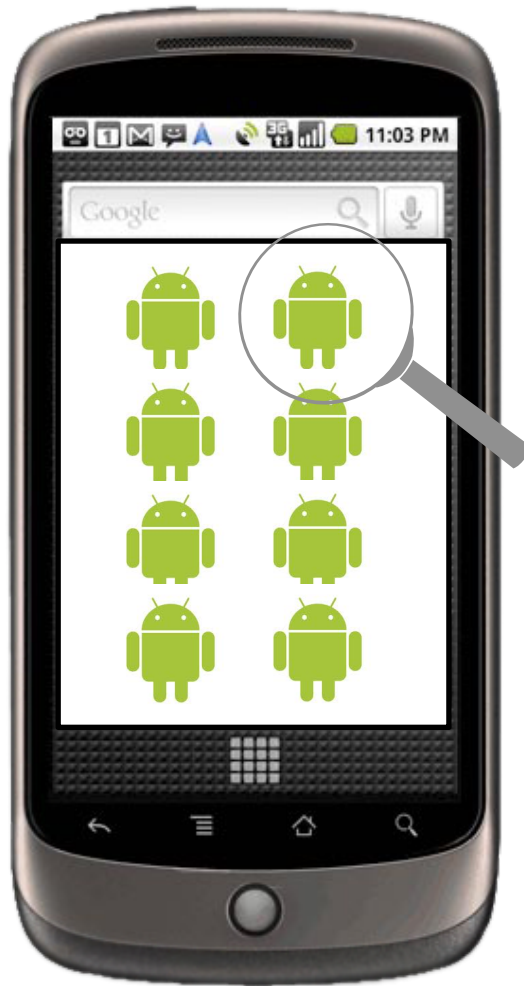


Learners Attest to the Value of Search

search is reported the
**#2 most used and
#3 most useful**
resource behind school websites
and friends and family

Source: Compete, Inc U.S. Custom Education Study, Q3 2011

They Search Across Devices



1 in 8

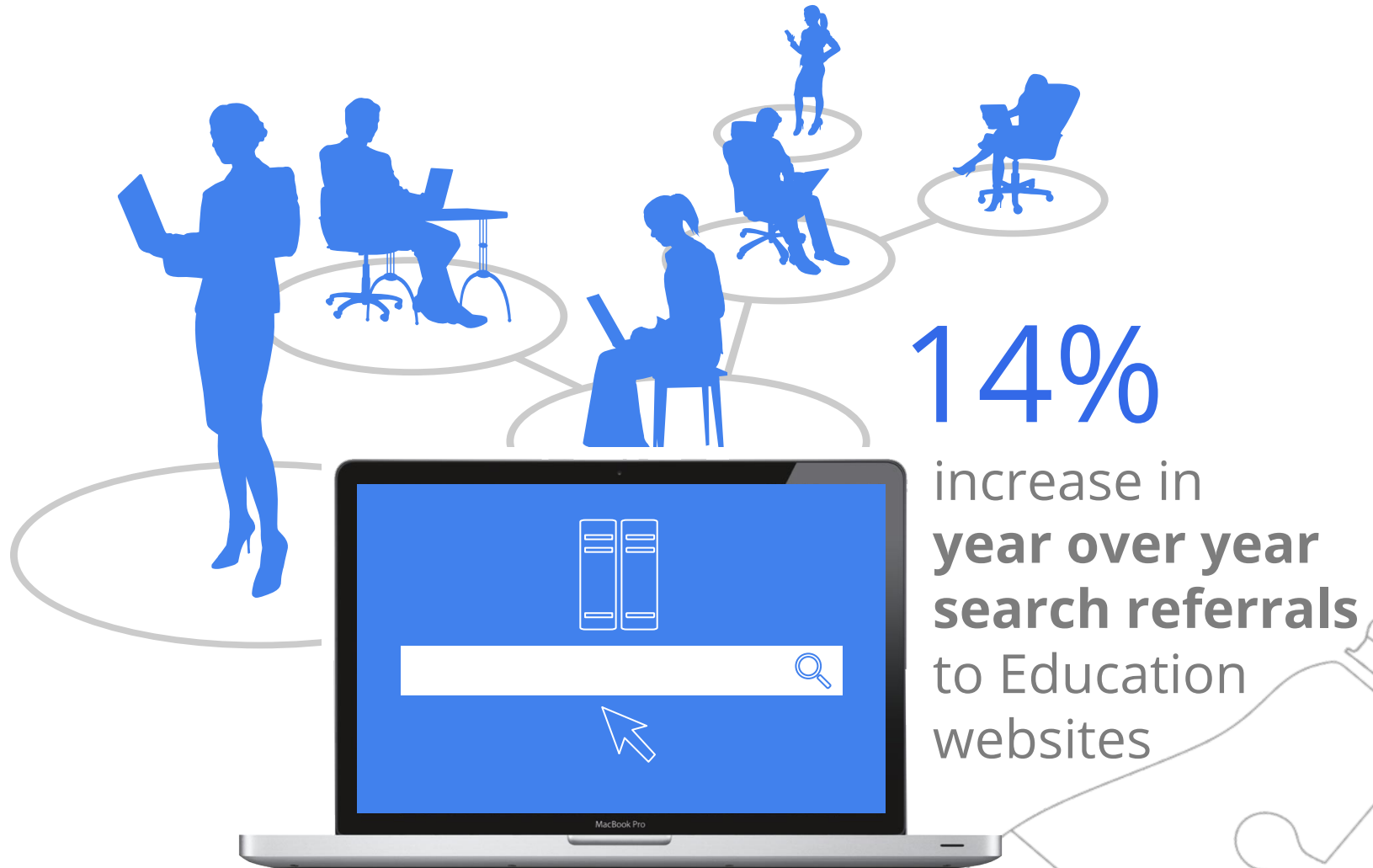
EDU searches will be
mobile in 2012

Source: Google US Education Search Analysis, 2012

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Influence of Search Continues to Grow

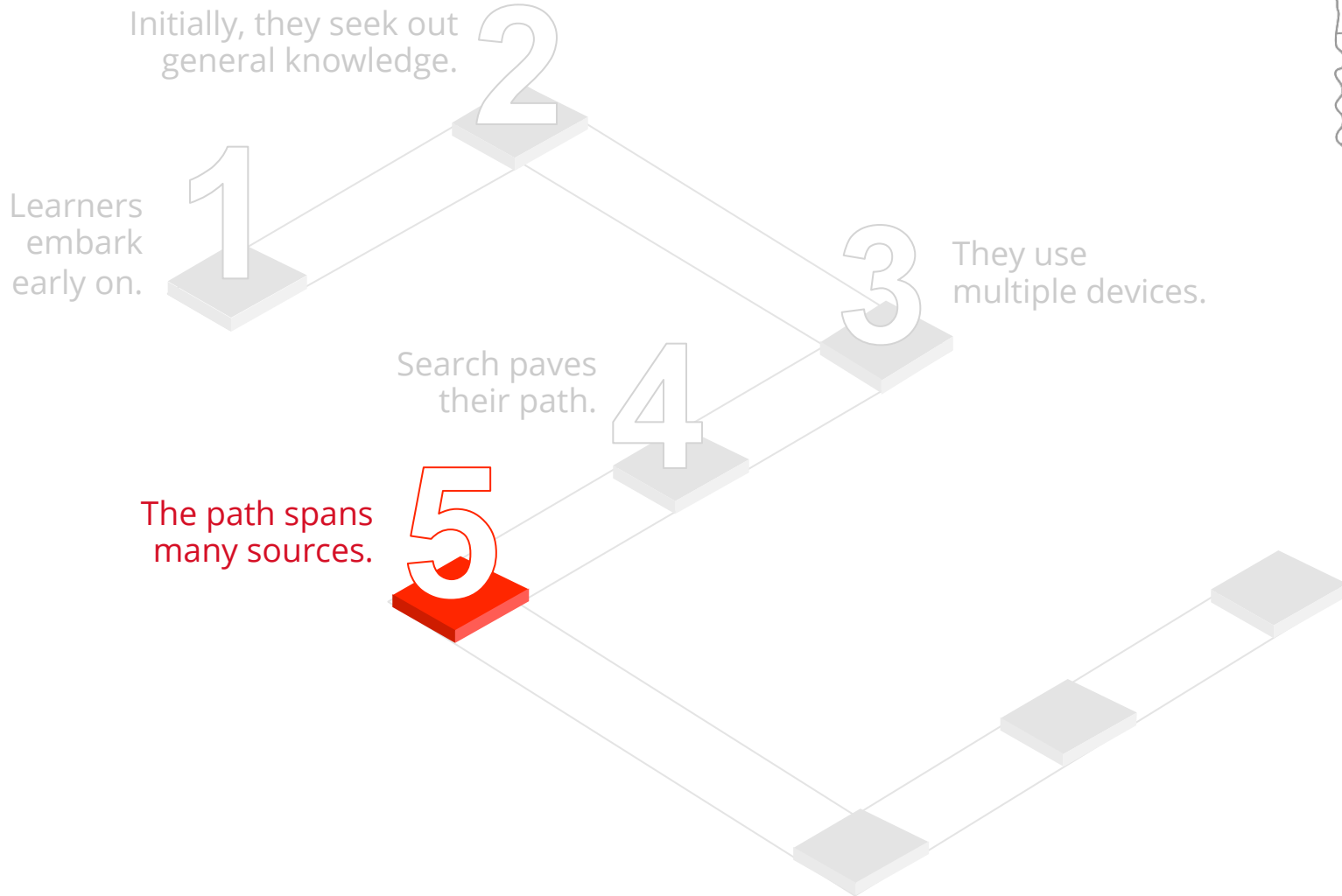


Source: Compete, Inc U.S. Custom Education Study, Q3 2011

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The Learner's Journey



Learners Collect Information from Many Sources

Resources Most Used by Prospective Students During Research Process



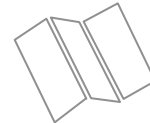
School Website
75%



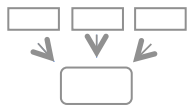
Search Engines
70%



Family / Friends
64%



Brochures
56%



Aggregators
46%



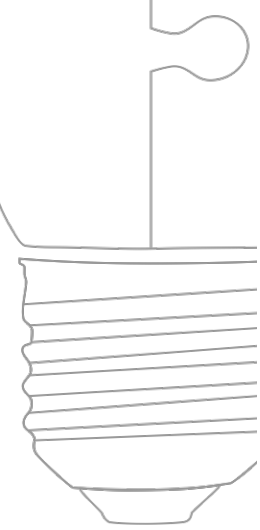
Mentor / Counselor
44%



Ranking Sites
29%



Social Networks
28%

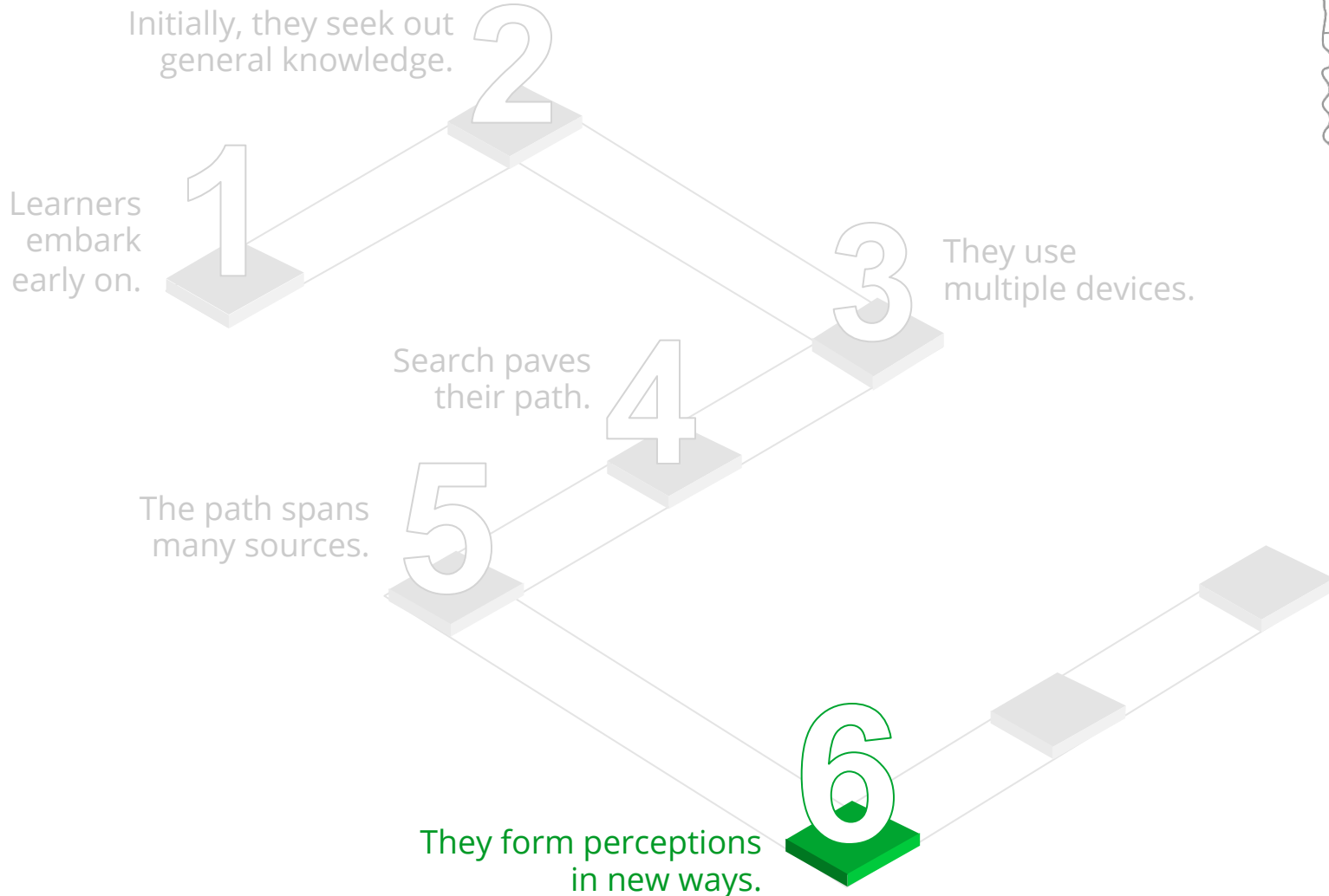


Source: Compete, Inc U.S. Custom Education Study, Q3 2011

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The Learner's Journey



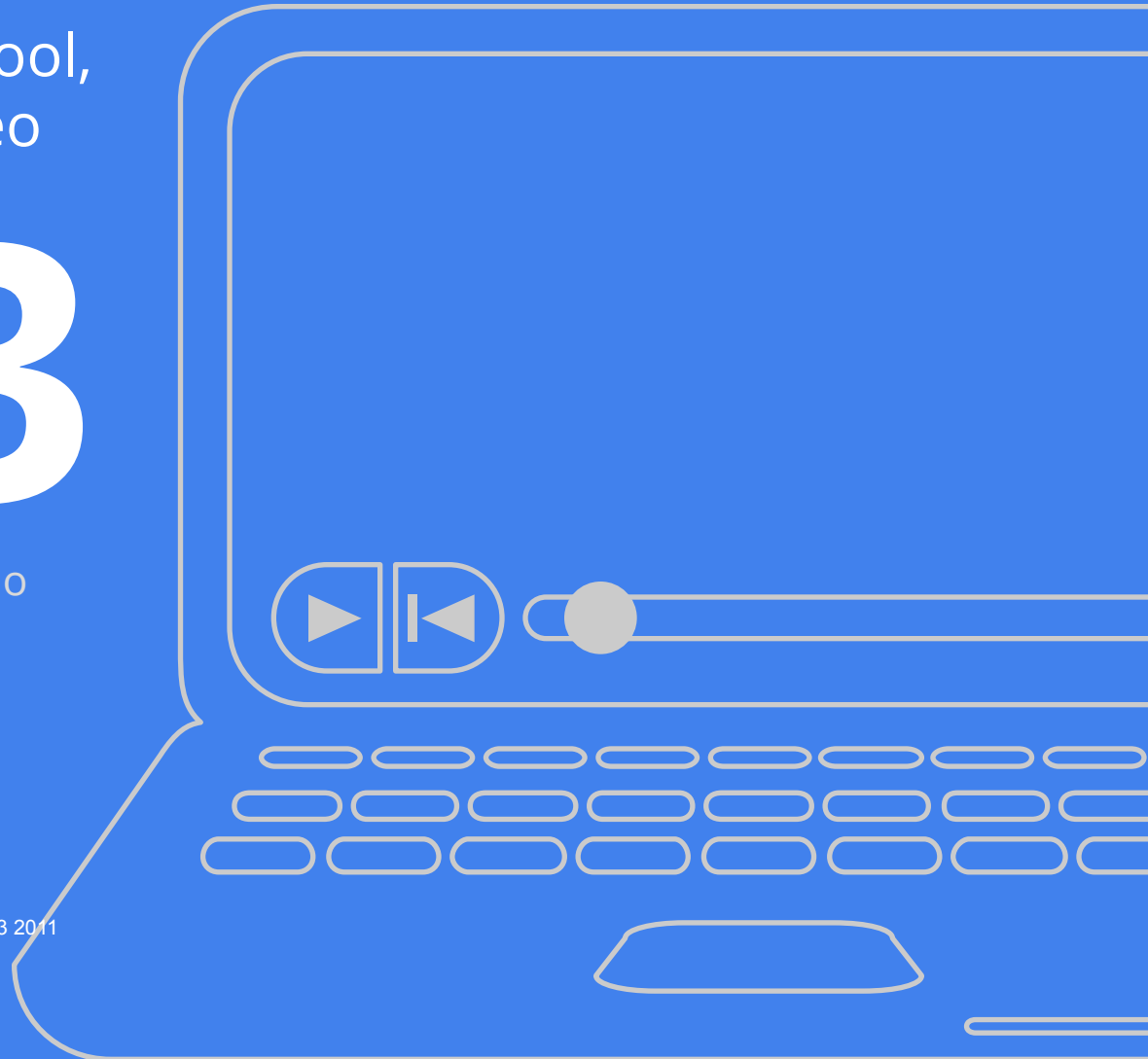
To Get to Know a School,
Learners Look to Video

2 out of 3

of researchers who use video do
so to understand specific
features of a school

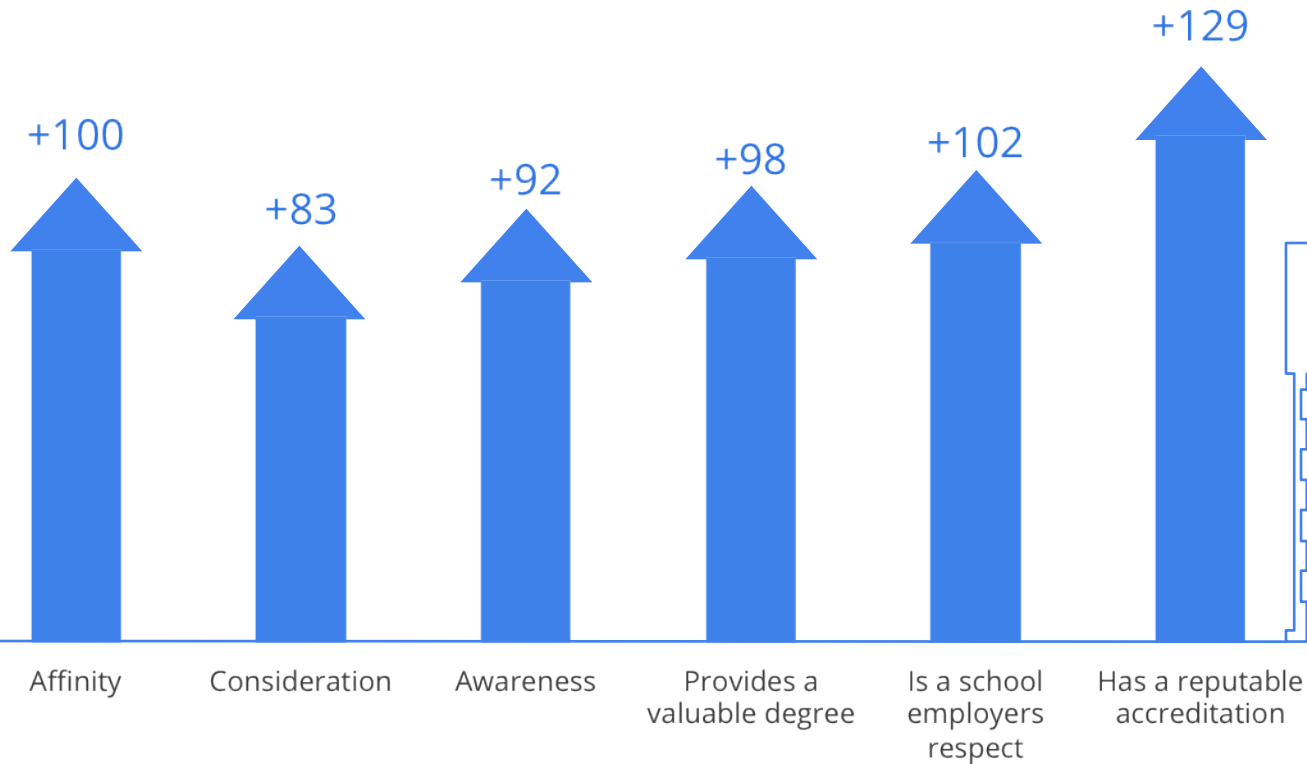
Source: Compete, Inc U.S. Custom Education Study, Q3 2011

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New Opinions & Perceptions Start to Form

Lift in metrics/perceptions about a school after video ad exposure
% Change in Exposed vs Control



Source: Brand Perceptions in Higher Education, ipsos OTX, commissioned by Google, Fall 2011 (US)

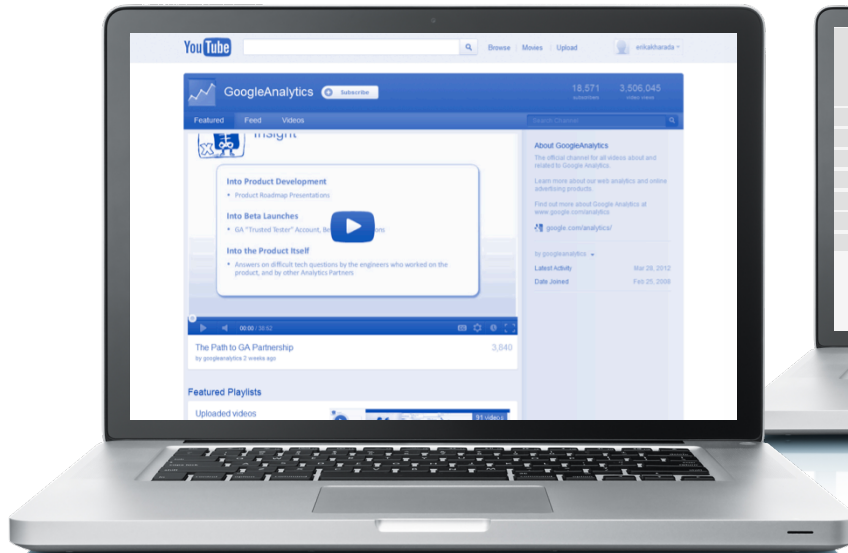
Viewing Centers on YouTube, Your Website

Top 2 websites used to watch education videos

Prospective students who watch videos as part of their research process

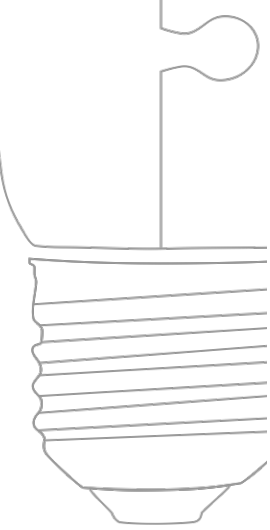
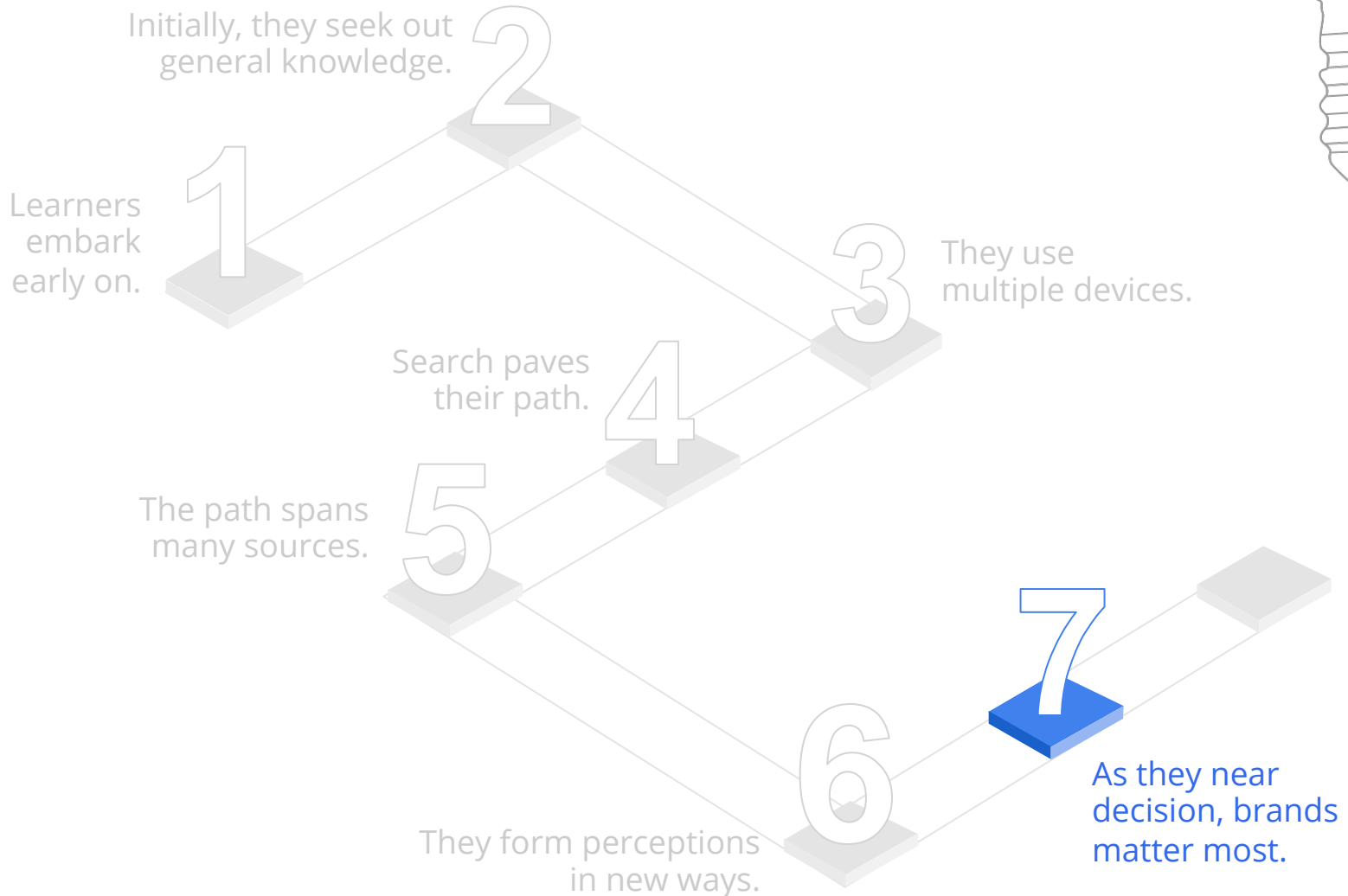
62% YouTube™

57% Higher Education Institution Websites



Source: Compete, Inc U.S. Custom Education Study, Q3 2011

The Learner's Journey

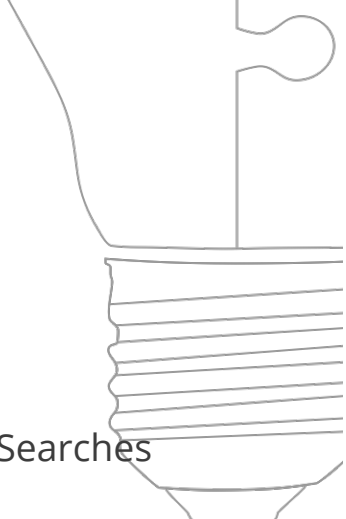


Brands Become Priority as Journey Progresses

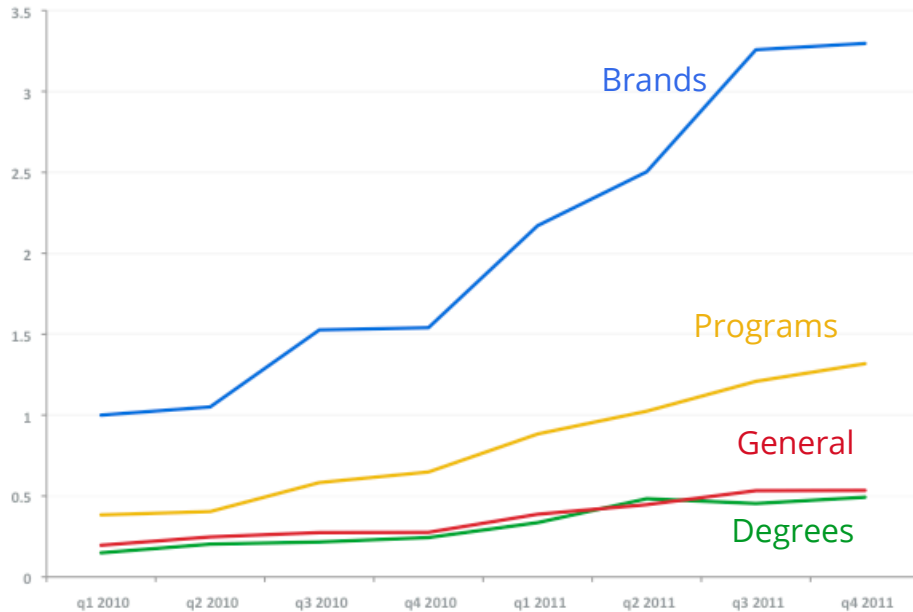
Branded queries
more than double
from 120 days out to
day of a conversion.

Source: Compete, Inc U.S. Custom Education Study, Q3 2011

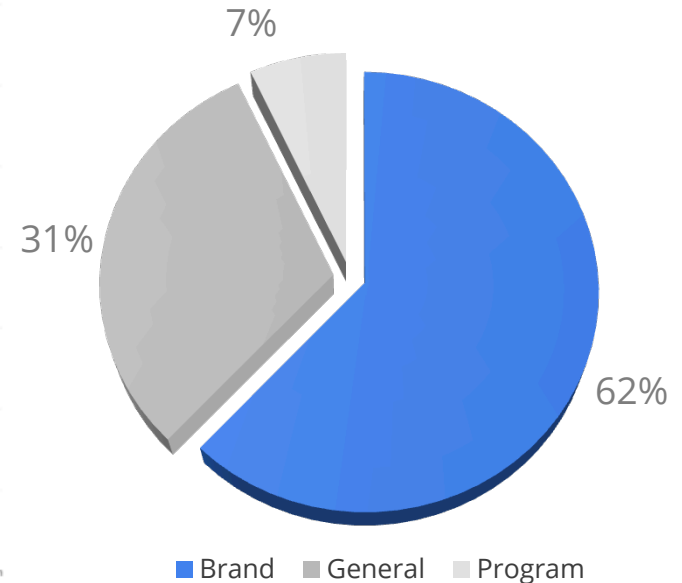
They Explore Brands in Various Ways



Mobile Education Queries



Share of YouTube EDU Searches by Type



Source: U.S. Education Search Analysis 2012; Complete Inc U.S. Custom Education Clickstream Study, Q3 2011

They Consider Many Facets of a Brand

Top factors considered when applying to a higher education Institution



Affordability

60%



Location

58%



Flexible Learning

50%



Reputation

49%



Friend/Family
Attends

39%



Student
Culture

26%



Reputable
Professors

29%



Strong Alumni
Network

13%

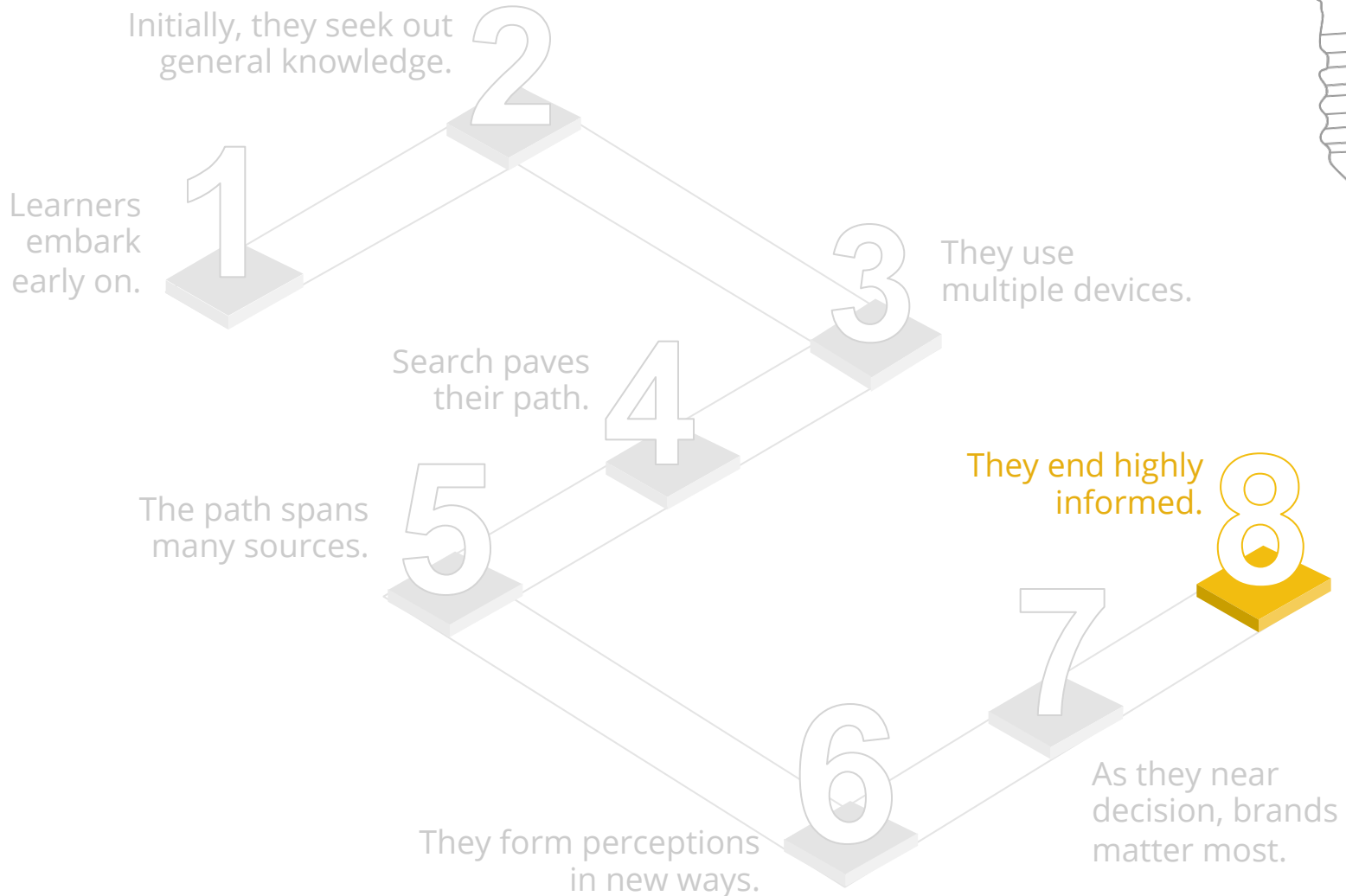


Other

7%

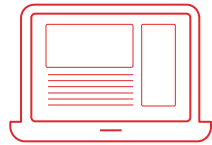
Source: Compete, Inc U.S. Custom Education Study, Q3 2011

The Learner's Journey



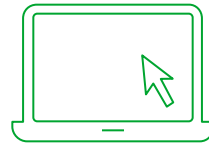
They've Done the Legwork By Decision Time

Journeys that end in conversion most commonly have:



Page Views

16+



Conversions

4



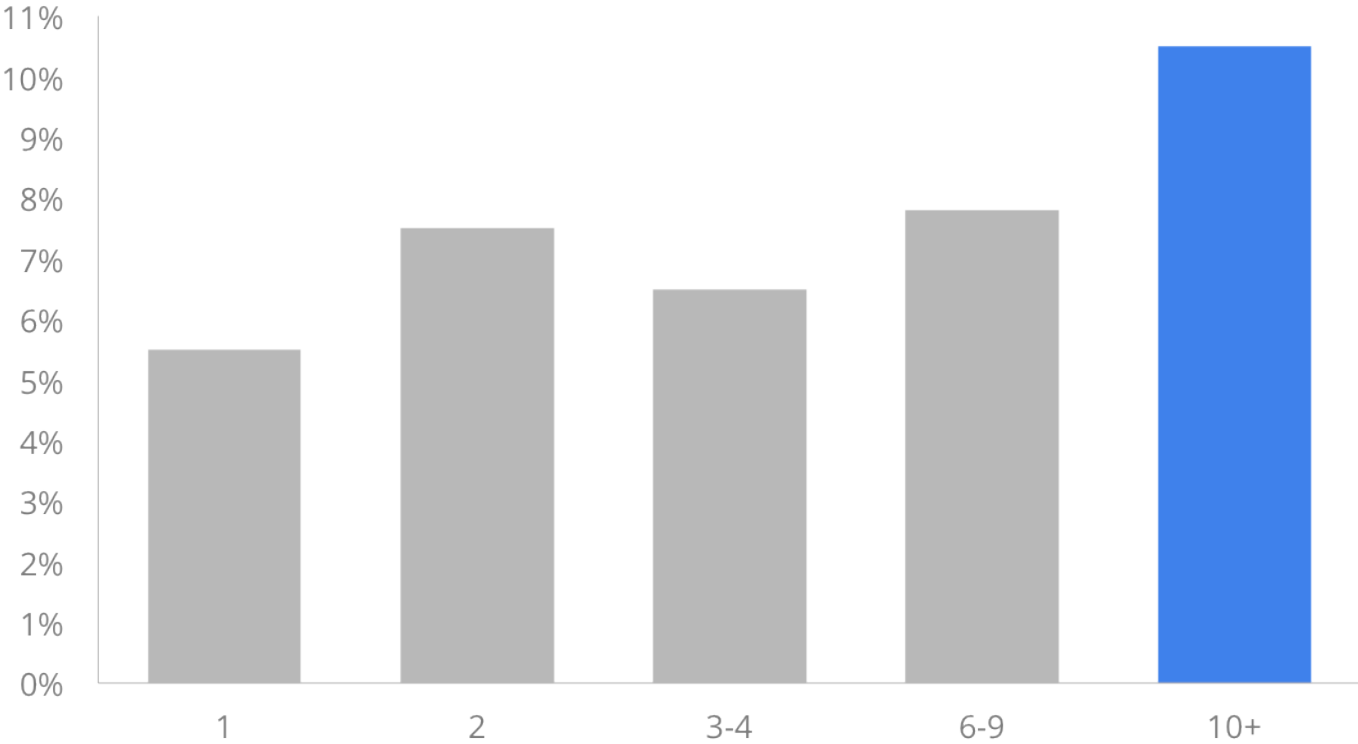
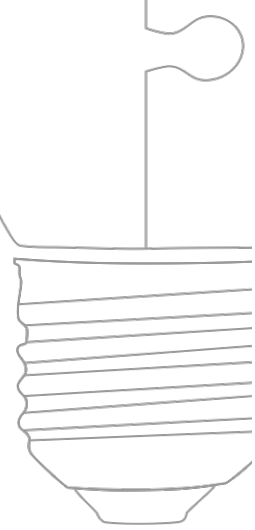
Search Queries

10+

Source: Compete, Inc U.S. Custom Education Study, Q3 2011

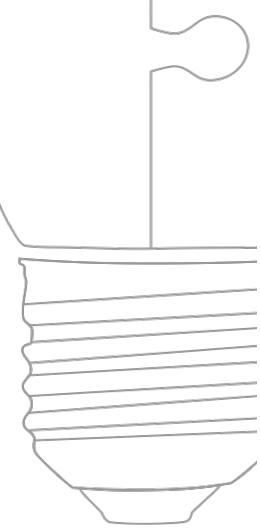
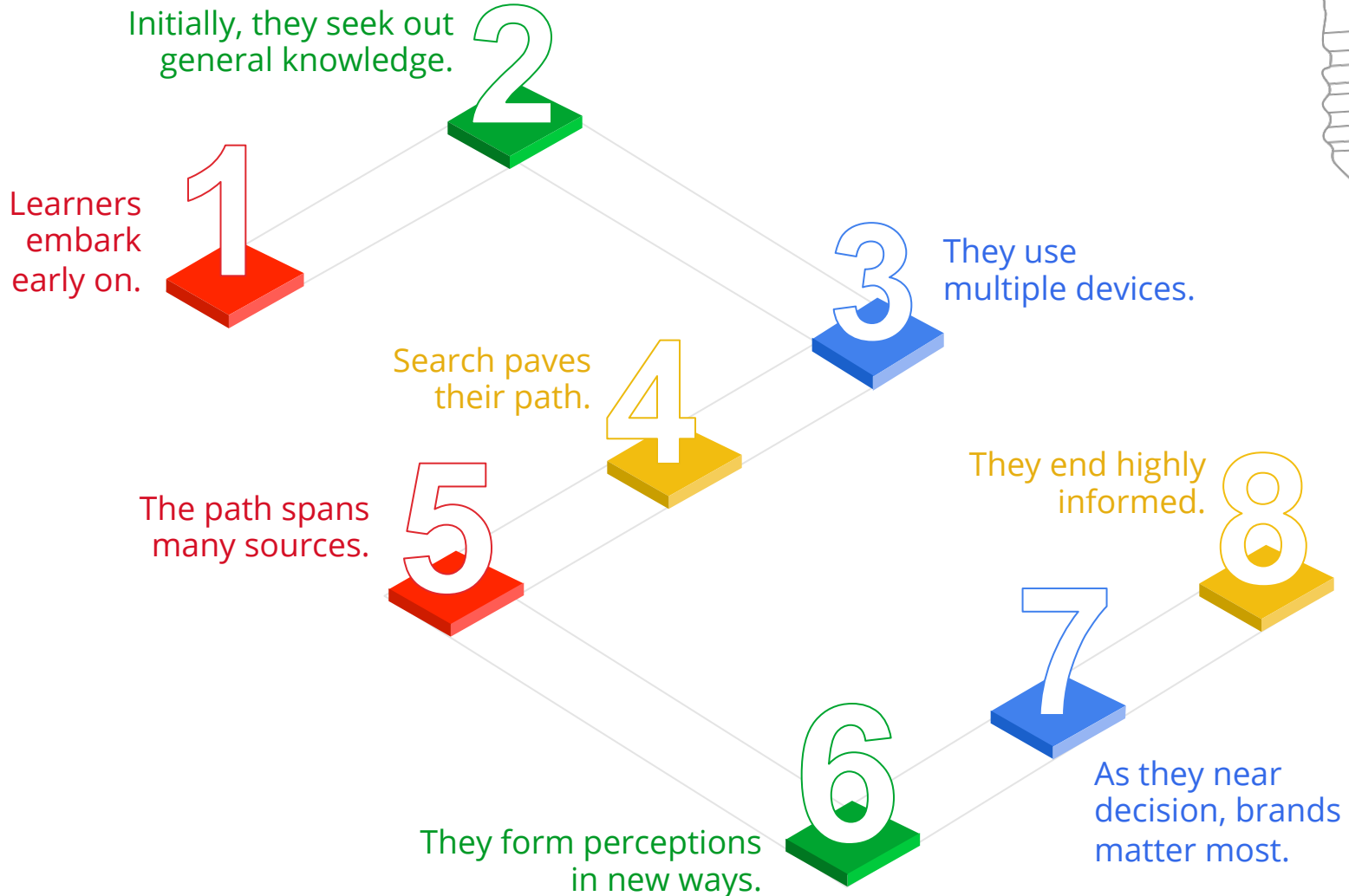
The Journey Has Changed the Mindset

Conversion Rates by Level of Search Activity



Source: Compete, Inc U.S. Custom Education Study, Q3 2011

The Learner's Journey



What Does This Mean For You?

Don't force every Learner down the same path.

- Tailor ad & landing page messaging to match the mindset
- Extend attribution windows to understand how early engagement leads to conversion
- Create engaging brand experience across all devices
- Leverage the power of video to provide utility and shape perceptions