



The Super Investigator: Understanding Today's “Always On” Prospective Student

**A REPORT ON
PROSPECTIVE STUDENTS AND THE COLLEGE DECISION PROCESS
LIPMAN HEARNE KEY INSIGHTS JANUARY 2013**

Table of Contents

Introduction	2
Understanding Today’s College-Bound Students	
“Super Investigators” and Their Preferences: Money and Major Dominate	8
Information Sources: The Emergence of Online Channels	10
The College Search: An All-Consuming Enterprise	18
Research Sources Play Different Roles in the College Search Process	21
Evaluating What Works: Implications for Colleges and Universities	24
Stealth Applicants and the College Search	28
Special Populations	
Transfer Students	32
International Students	35
Advertising and the College Decision	38

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Introduction

Introduction

Today's college-bound prospects are social media natives. What's a college marketer to do?

By Tom Abrahamson
Chairman, Lipman Hearne

With the rise of social media influencing consumer decision making across the board, the process of choosing a college has changed dramatically in the last decade. What has historically been a tightly controlled and regimented communication exchange between prospective students and colleges is now largely self-directed and self-managed by the student and supplemented with copious advice from people he or she knows—as well as the opinions and experiences of countless others known only through an avatar and a username.

Gone are the days when researching a college consisted of poring over guidebooks, such as the 1,591-page edition of *Barron's Profiles of American Colleges*. In my years as enrollment manager and dean of admissions at DePaul University, I anticipated (and observed) that students would follow their “book research” by submitting an information request, completing a paper application, and mailing it to the college. A different world confronts admissions officers today.

Popular colleges are inundated by applications, an increasing number of which are from “stealth” applicants (meaning students who first become known to the college when they submit their application). And the number of schools to which prospective students apply is rising each year. Since 1990, the number of students applying to seven or more colleges has risen from 9 percent to 22 percent, according to the Higher Education Research Institute at UCLA. The old maxim “apply to three colleges: your reach school, your target best-fit college, and your safety school” has been replaced; the advice high school counselors give ambitious students today is to apply to four to six colleges at a minimum. Several important and time-honored practices that governed the decision process, such as need-blind admission and non-negotiable scholarship awards and discounts, are also gone.

So how shall college marketers proceed? Instincts honed over the years serve us well, but when it comes to making significant shifts, data is an invaluable tool. Those who are inclined to make strategic decisions supported by data now have an excellent new resource in the findings of this study.

The groundbreaking research presented in the following pages examines the behavior and attitudes of a trailblazing population of prospective students: students who are tantamount to the early digital music adopters who turned to the Internet for music instead of buying CDs from Best Buy—and made a new phenomenon called iTunes necessary (and hugely profitable). In other words, the methods today's students use for researching and selecting colleges are becoming the new “business as usual”—and colleges must adapt, anticipate applicants' behavior, and seek to differentiate themselves in as yet unfamiliar forums.

By employing this study's findings, higher education marketers and enrollment managers can devise more effective branding and messaging strategies to deliver communications through the most utilized channels and at the most appropriate time to reach savvy prospective students at key stages of the college decision process. In the end, our shared purpose is as it ever was: helping today's students discover and embrace the “perfect fit” college.

About This Report

To gain fresh insights into how students are consuming and responding to ever-changing college marketing channels, Lipman Hearne partnered with college search website

Cappex.com to survey its users—high school juniors and seniors, and college students who are considering transferring from their current school. With more than 11,000 valid respondents nationwide, this is the largest survey of its kind ever conducted.

We focused our study specifically on the robust community at Cappex.com, which makes up 25 percent of the entire U.S. college-bound population. Users of college search sites (e.g., Cappex, Collegeboard, College Confidential, Rate My Professor) are actively engaged in nontraditional means of researching and applying to colleges. Hundreds of thousands of Cappex members have created up-to-date profiles that include the colleges in which they're interested, academic performance, and demographic, psychographic, and behavioral information. We gained insights into prospective students' innovative research methods, what they're looking for, and what pushes them to apply to, and ultimately to enroll at, colleges nationwide.

This report:

- Reveals the relative importance, frequency, and timing of the information sources college-bound students use during their college decision process
- Depicts how college-bound students use various information sources

- Addresses stealth prospects' and applicants' behavior
- Describes attitudes toward online privacy and personas
- Summarizes the role of parents in the college search process
- Prioritizes the importance of college attributes according to various student segments

MORE INFO AVAILABLE Please note margin flags indicating topics on which more information is available. Do not hesitate to contact us if you would like to discuss these items further.

The Study Sample

From July 11 to July 31, 2012, Lipman Hearne and Cappex.com collected data from registered Cappex.com users in an extensive nationwide survey. The sample included graduate and international students; adult learners; current college-bound high school sophomores, juniors, and seniors; and enrolled college students who are thinking about transferring to another college.

The vast majority (97%) of survey respondents were traditional-age prospective first-time students, but there were also

enough potential transfer students (N=297) that we were able to look at this segment in isolation. Areas where transfer students differ from the first-time students are noted throughout the report. Responses were also analyzed by high school class year—rising juniors (N=865), rising seniors (N=3,915), and graduating seniors (N=6,119).

All respondents are registered at Cappex.com, an online community allowing students to create a profile and then engage with institutions to determine fit. To learn more about Cappex, visit their website at www.cappex.com. Since all survey respondents were members of Cappex.com, some sample bias is expected.

Respondents were considering a range of institution types. Differences among students considering a particular type of institution are noted throughout the report, where relevant.

Respondents rated 1,845 different institutions nationwide. The list of institutions and number of ratings is posted on the Lipman Hearne website: www.lipmanhearne.com/super-investigators. Custom reports on specific institutions are available upon request.

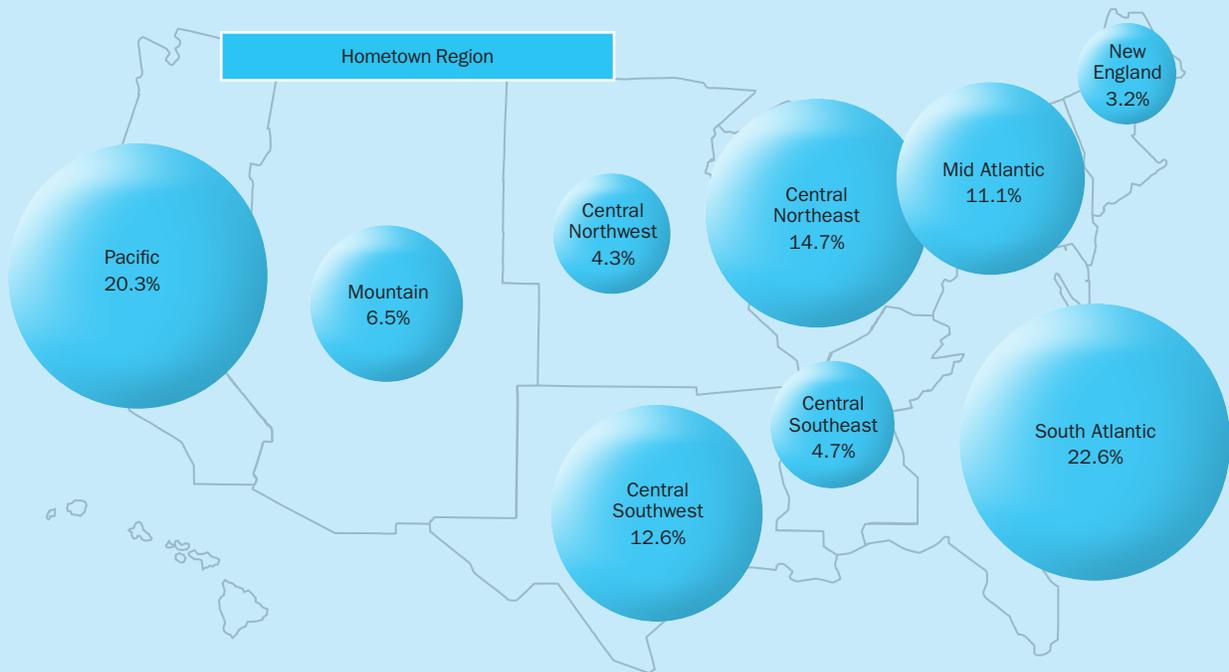
MORE INFO AVAILABLE

FIGURE 1
Population profile

Race
White 46%
African American 21%
Hispanic 17%
Asian 10%
Native American 1.5%
Other 3%
Don't know/prefer not to answer 1.5%

Gender
Female 69.2%
Male 30.8%

First Generation College Student
Yes 34.4%
No 65.6%



About Lipman Hearne

Lipman Hearne is the nation's leading marketing and communications firm serving higher education organizations. For more than 40 years, the firm has worked with more than 400 colleges and universities, conducting extensive market research, developing strategic marketing plans, and providing creative and tactical implementation services to help its clients achieve their aggressive bottom-line goals in enrollment, fundraising, and brand building.

With offices in Chicago and Washington, D.C., Lipman Hearne is led by marketing specialists whose executive and agency backgrounds include tenures in higher education and nonprofit marketing, advertising and branding, market research, fundraising, and public affairs. For further information about Lipman Hearne, visit www.lipmanhearne.com or call (312) 356-8000.

About Cappex.com

Cappex.com is where online engagement means recruitment results. It is a highly cost-effective way to reach students as they are actively discovering and researching colleges online. More than 500 colleges

find their ideal enrollment candidates, introduce them to their campuses, and continue the conversation on Cappex, where more than 4 million students have gone to find their ideal college.

Founded in 2006, Cappex is based in Highland Park, Illinois. To learn more about Cappex.com, visit www.cappex.com or Cappex's Facebook page at www.facebook.com/cappex.

About the Lipman Hearne Teen Panelists Quotes in This Report

Quotes labeled as "teen panelist" quotes in this report were taken from a long-range panel study being conducted by Lipman Hearne, launched in September 2011. The long-range study pinpoints how students choose the colleges they do—and how the decision-making process works from the beginning of a student's junior year of high school. By the conclusion of the study, we will have followed a panel of 18 students (now seniors) for two full years, evaluating their decision-making process via online discussion groups and monthly homework assignments covering a range of topics that overlap with this survey's focus.

Understanding Today's College-Bound Students

“Super Investigators” and Their Preferences: Money and Major Dominate

One objective of this study was to find out more about prospective students’ college preferences. To understand what students were looking for in a college, we asked respondents to select up to five qualities most important to them from a list of 29 attributes. For example, is a safe campus most important, or do students care more about academics? Is the college’s overall reputation a critical factor, or just the reputation of a student’s intended major?

Of their preferred academic program, affordability and reputation were the most important qualities. Good jobs after graduation also rose to the top. In similar research studies conducted by Lipman Hearne, these same characteristics consistently emerge as priorities. As such—and given other findings that suggest today’s students are “Super Investigators” intent on drilling deeply into a wide range of factors—this set of characteristics should be considered “must-have” attributes. These should serve as the foundation for successful communications sent to prospective students. The following table details rank order of characteristics defining good fit.

TABLE 1

Rank order of the most important characteristics when thinking about “good fit” by institution type	
1	Offers good scholarships and financial aid packages to students
2	Major I am interested in has a strong academic reputation
3	Tuition and fees are affordable
4	Strong academic reputation
5	Helps graduates get good jobs
6	The campus is safe
7	Offers wide variety of majors and academic programs
8	The faculty are committed to excellence in teaching undergraduate students
9	Offers many social activities, intramural athletics, student organizations and other opportunities to get involved on campus
10	Offers significant experiential learning opportunities such as internships

“Students on Cappex.com are searching for colleges and scholarships that would be a good fit, and they want to know about net costs, financial aid, their chances of getting in, and what makes different campuses unique.”

Chris Long, President, Cappex.com

For the most part, the “must haves” cut across institution types, with nuanced shifts in priorities.

- **Students considering research and master’s degree–granting schools:** These students identified the same 10 characteristics as most important, though the rank order varied somewhat.
- **Students seeking bachelor’s degree–granting schools:** These students saw *small class size* as a more important factor than offering a *wide variety of majors*.
- **Students interested in two-year institutions:** These students prioritized a *flexible class schedule* and *convenient location* to their hometown above offering a *wide variety of majors and programs*.
- **Students considering out-of-state public schools:** These students were more concerned about *strong academic reputation* than *cost*.
- **Students considering in-state and out-of-state private schools:** These students were most concerned about *financial aid defraying the cost of tuition*.

MORE INFO
AVAILABLE

For more details on good fit by institution type, please contact us. We have details on the following institution types:

- PhD-granting
- Master’s-granting
- Bachelor’s-granting
- Associate’s-granting
- In-state
- Out-of-state
- Public
- Private

As a starting point, it’s helpful to know the characteristics students value the most. But just how do students go about discovering which schools and colleges have these attributes? What information sources do they regard as credible, and what evidence eases their minds about what they might expect from a certain school or college? The findings detailed in the following pages paint a picture of today’s prospective students as Super Investigators—savvy, proactive, and frequent users of a wide variety of formal and informal channels in the quest to evaluate and ultimately choose a college.

Information Sources: The Emergence of Online Channels

We asked survey respondents to comment on marketing channels that are typically perceived as nontraditional—specifically online sources like college search sites, college admissions sites, and social media.

Online marketing channels are now a go-to source at all stages of the college decision.

College search sites play a significant role in prospective students' research. Search sites give students access to rich data about thousands of colleges based on their specified criteria. But college search sites aren't students' only research source. Super Investigators use a combination of channels to inform their college search—pulling data from multiple sources, including mainstream marketing materials. As new tools are adopted, the old or more traditional ones remain part of the mix. In fact, direct marketing (i.e., emails, viewbooks, postcards, and other communications addressed directly to the student) and word of mouth are still very effective information channels, according to survey participants.

“College viewbooks still have a role in the college search process. While they are used less frequently, they have important pass-along value, and those of the favored school are often kept as handy reference tools.”

Mark Nelson, Senior Vice President, Lipman Hearne

“Over the last year, the most innovative college search sites have shifted from providing basic information about colleges to more personalized offerings and engagement opportunities for students.”

Chris Long, President, Cappex.com

FIGURE 2

Use of information channel in college search

SOURCE: Please indicate which of the following information sources you have used to learn about colleges and universities.

NOTE: The graph aggregates 41 channels into seven types.

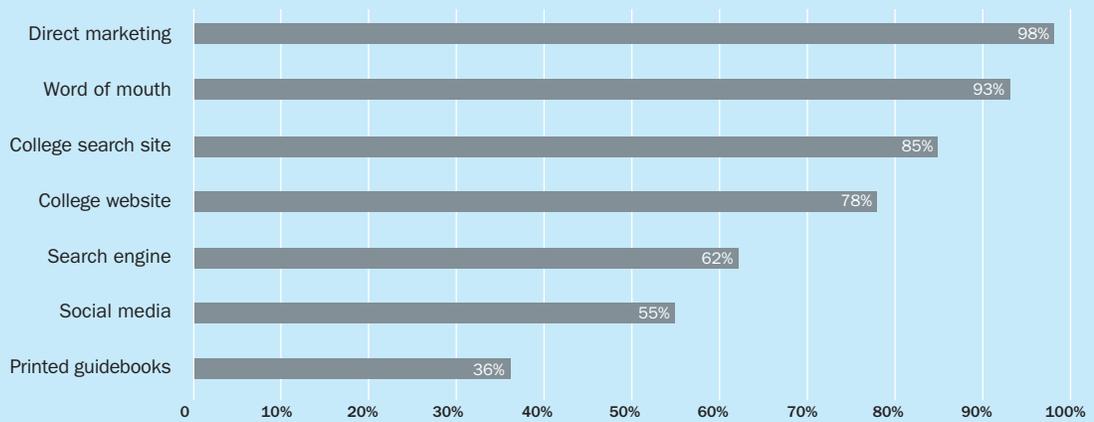
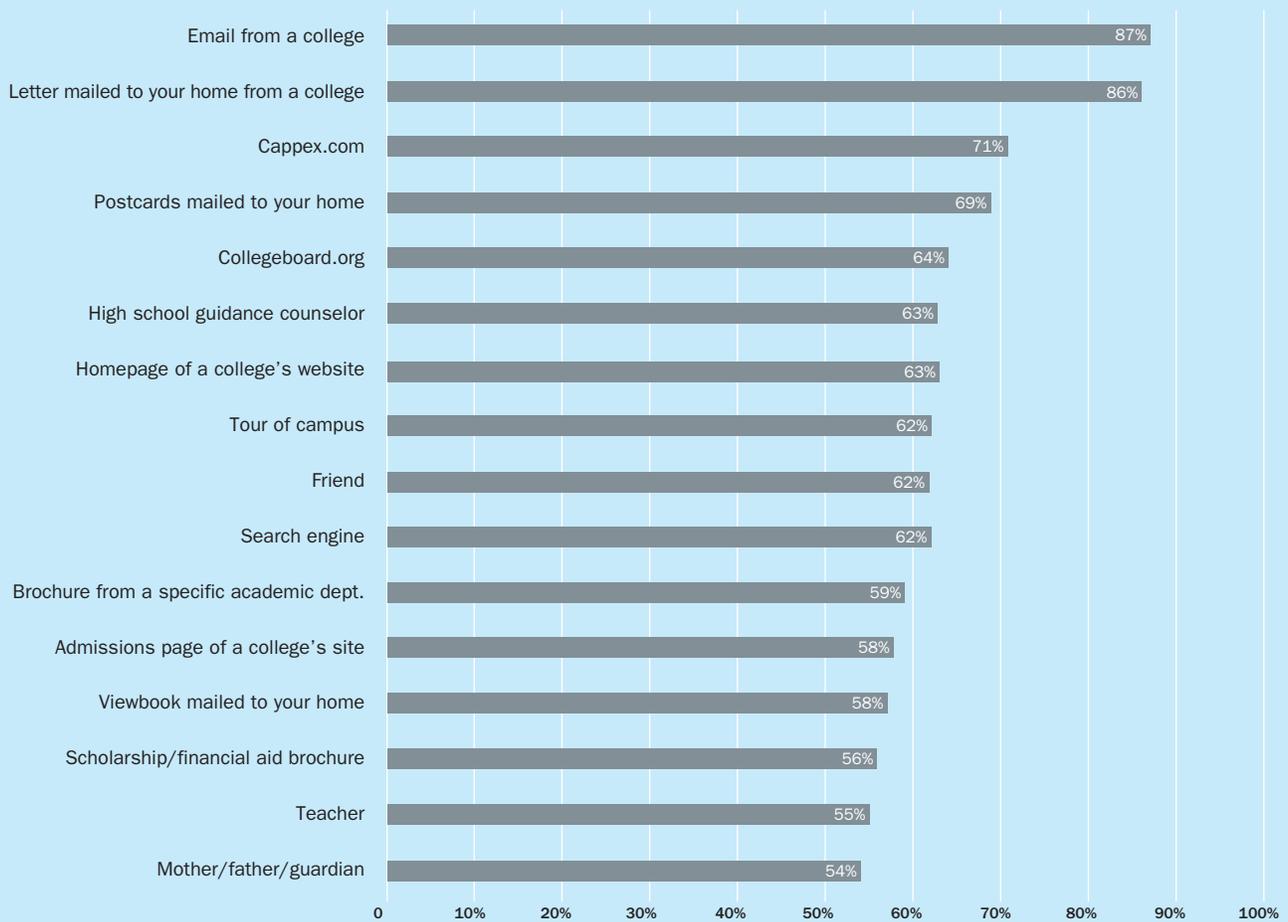


FIGURE 3

The 16 specific information sources used by the majority of respondents

SOURCE: Please indicate which of the following information sources you have used to learn about colleges and universities.



The meat of a college website: not just the homepage, but the admissions page and academics pages.

There are three areas of a college's web presence students told us are important to them: the homepage, the admissions page, and academic pages. Academic pages may be an overlooked opportunity.

The majority of respondents visited a college's homepage (63%) or admissions page (58%). A smaller but significant number had visited the pages for a specific academic department of interest to learn about colleges (39%). Those respondents who visited a college website but didn't use the homepage went directly to the admissions page or a specific department's page. This may be students who entered the site through search engines, other portals, or emails.

Students seeking specific information frequented different sections of colleges' websites. For example:

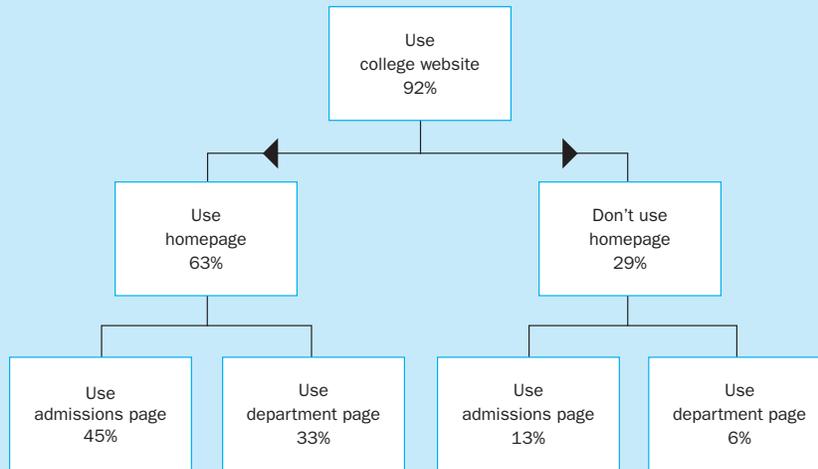
- **Homepages** attract students interested in an institution's academic reputation, or in opportunities to get involved in on-campus and off-campus activities.
- **Admissions pages** attract students interested in an institution's academic reputation, rankings, and faculty commitment to teaching undergraduate students.
- **Academic department pages** attracted students interested in an institution's reputation in their major of interest and faculty commitment to teaching undergraduate students.
- **Faculty profiles** attracted a small percentage of students interested in developing critical thinking skills rather than preparing for a specific career.

Social media and the “serious business” of a college search.

Not surprisingly, college-bound teens are using social media. Almost all of the respondents have a Facebook, Twitter, or similar social media account (88%). And yet, very few respondents indicated that social media influenced their ultimate college decision. How are students using social media, then?

Facebook was the single most used site (40%). Facebook was commonly used in a passive manner—such as reading status updates and checking event invitations; 28 percent of respondents indicated that they used the site by visiting or liking a specific college's page. Only 8 percent of all of the students surveyed said they used it to poll friends/start a conversation about a college.

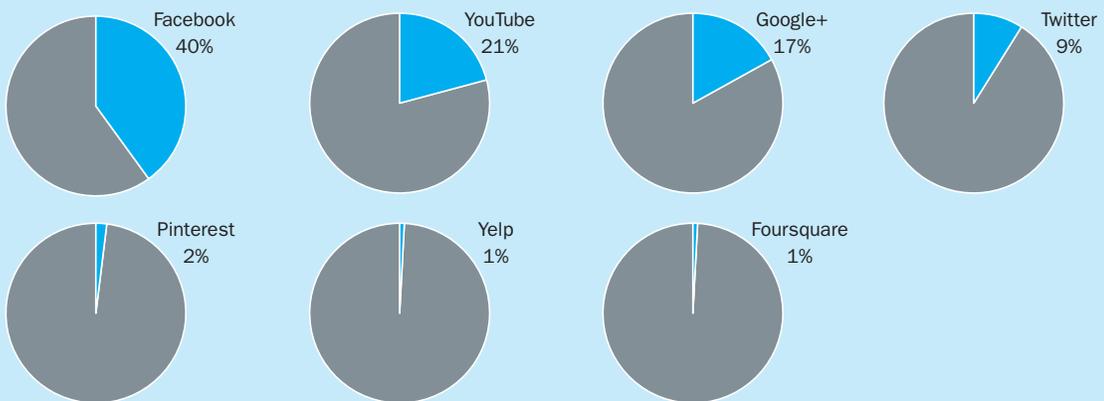
FIGURE 4
College website user patterns



NOTE: All percentages in the chart represent a portion of the total sample following the path (e.g., 45% of students use a college website AND the homepage AND the admission's page).

FIGURE 5
Used social media to learn about college

SOURCE: Please indicate which of the following information sources you have used to learn about colleges and universities.



Twitter was less frequently used in the college decision (9%). Twitter users were not likely to post updates; only 3 percent of all respondents used Twitter to communicate with friends about a college. Though a majority of these prospective students said they use a social media website in their college search (55%), just over one-third of graduating seniors used social media to engage with a college (37%).

If the advantage of public-facing and (increasingly) open social media tools like Facebook and Twitter is that they invite previously unknown parties to engage with one another, why does it seem that college-bound students are merely listening? Separately, Lipman Hearne's teen panelists have indicated that they prefer to preserve social media forums as a "safe space" for expression and interacting with friends, and to keep their interactions with a prospective college more formal and intentional.

“ [If I worked for a college,] I would use social networking sites to communicate with high schoolers. We are constantly on the computer and nosing around in other people's business, so maybe we could add nosing into the college's business. I would give the quick facts about the school online with easy access. A lot of the time you have to search through a college's website to find that information and if it is not easy to find, I give up.

Lipman Hearne Teen Panelist

“ We have a new tradition at our high school. When we hit senior year, we all change our Facebook names so colleges can't spy on us. For example, Emily Lamb might change her name to Emily Sheep.

Lipman Hearne Teen Panelist

Parents aren't using Facebook to engage in the college search process.

While students were using social media sites themselves, very few indicated that their parents were using social media for the college search—3 percent indicated that their parents were using their own (the parent's) account in the search, and 2 percent indicated that their parents were using the student's account in the search. Only 2 percent indicated that their parents had enhanced the student's social media profile in anticipation of the college search.

Social media habits and their impact on college admittance.

Although only 5 percent of respondents created a profile specifically to use in their college search, many did believe that institutions may be viewing them. Nearly half of traditional-age prospects (44%) believed that colleges were very likely or somewhat likely to look at the social media profile of a prospective student.

The role of college search sites.

Eighty-five percent of survey participants used a college search website to learn about colleges. But it was surprising to see that beyond Cappex.com (71%) and Collegeboard.org (64%), other well-known sites were not receiving universal usage; the four remaining college search sites in the study had usage comparable to printed guidebooks (34% compared to 36%).

TABLE 2

How college search sites are used

SOURCE: Do you typically use each of the following actively in your college search (such as by posting reviews, adding to discussions, etc.) or passively (such as by reading reviews posted by others)?

	Used Actively	Used Passively	Not Used
Cappex.com	34%	37%	29%
Collegeboard.org	24%	40%	36%
Zinch.com	10%	20%	70%
CollegeConfidential.com	5%	10%	85%
PrincetonReview.com	4%	13%	83%
USNews.com	3%	9%	88%
RateMyProfessor.com	3%	8%	89%

As mentioned previously, sites like Collegeboard.org and PrincetonReview.com were typically first used early in the decision process (sophomore year), presumably to provide introductory knowledge of options. Sites like Cappex.com were typically used later (the end of junior year and beyond)—at a time when students start thinking practically about the college decision and start focusing in on finding a good fit. Sites like RateMyProfessor.com were used after graduation from high school, perhaps in anticipation of selecting courses for a student’s first term.

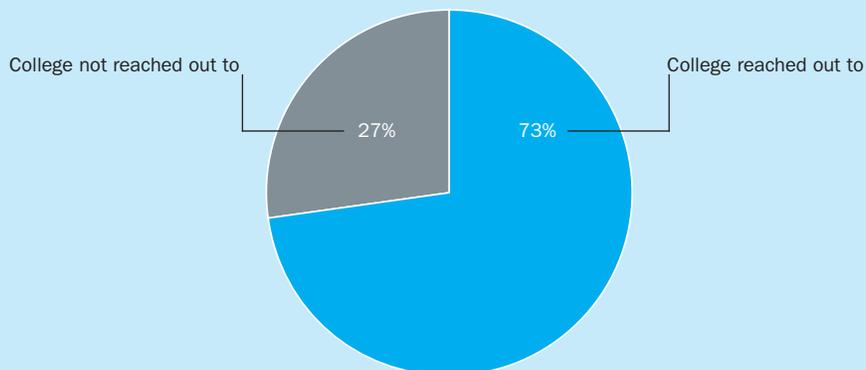
We defined student usage of search sites as either “active” or “passive.” Active use implies that students were contributing content to the sites they were engaged in. Passive use means that students were reviewing information contributed by other users.

Similar to social media sites, college search websites were primarily being used passively in the college search. The exception was Cappex.com, which was used actively by around one in three respondents. Almost as many (29%) had responded to a message from a college sent through the Cappex website.

FIGURE 6

To text or not to text?

SOURCES: Would it be okay for a college that you have not yet contacted to send you a text message? Would it be okay for a college that you have contacted to send you a text message?



There was a connection between the attributes a student was seeking and search site usage. College search sites were used more frequently by students interested in an institution's ranking, academic reputation, how well graduates are prepared for graduate school, and off-campus activities.

Mobile data and apps: Never a bad place or time to be searching.

Students do not limit their college search to their home or school computers. Nearly half had visited a college's website on a mobile device (45%). One in ten had downloaded an app from a college on a mobile device.

Texting was not used extensively in the college decision—only 9 percent had texted with someone at a college and only 5 percent learned about college via a text message. However, the majority of college-bound students were open to communicating with a college via text—provided that it was a college that they had previously reached out to. This represents an enhancement opportunity; few colleges use texts to connect with prospective students. Investment in this emerging communication could behoove enrollment teams who are trying to increase their interaction with high-priority students.

Email overload?

Almost all respondents had received an email from a college (86%). In fact, they received a lot of emails from colleges. In the average week, they received five emails from colleges they had previously reached out to and 12 unsolicited emails.

But, despite the volume, the emails were flowing both ways. Half of all traditional-age respondents responded to an email from one of their preferred colleges (including 66 percent of graduating seniors) and half emailed at least two of their preferred colleges (including 64% of graduating seniors).

Nearly 40 percent of the respondents set up a dedicated email account specifically for the college process. Of those who did, most checked their account daily (71%).

The College Search: An All-Consuming Enterprise

Prospective student engagement in the college search.

Fifty-five percent of college-bound students that we surveyed are investigating colleges every day. They conduct much of their college research online and engage socially—through discussions with friends, counselors, and parents—to hone their college search. Direct mail and email are still important, but online vehicles have emerged as standard college search sources.

Approach to college search varies based on institution of interest.

Students with a strong interest in an out-of-state private college or university were the most highly engaged in the college decision-making process. However, an ongoing commitment to the college search was seen across student populations, regardless of the type of institution they were considering.

“Not only have online sources supplanted guidebooks, but the college search process is very social in nature, with friends playing a bigger role than counselors, teachers, parents, or other family members. Word-of-mouth reputation and ‘buzz’ are important and need to be a larger focus of a school’s marketing efforts.

These students are ‘always on,’ always searching. The college search process is all-consuming, and these findings clearly indicate that students partake in some college search activity on a daily or weekly basis.”

Mark Nelson, Senior Vice President, Lipman Hearne

FIGURE 7

Frequency of information channel usage

SOURCE: How frequently do you typically use each of the following in your college search?

NOTE: The graph aggregates 41 channels into seven types.

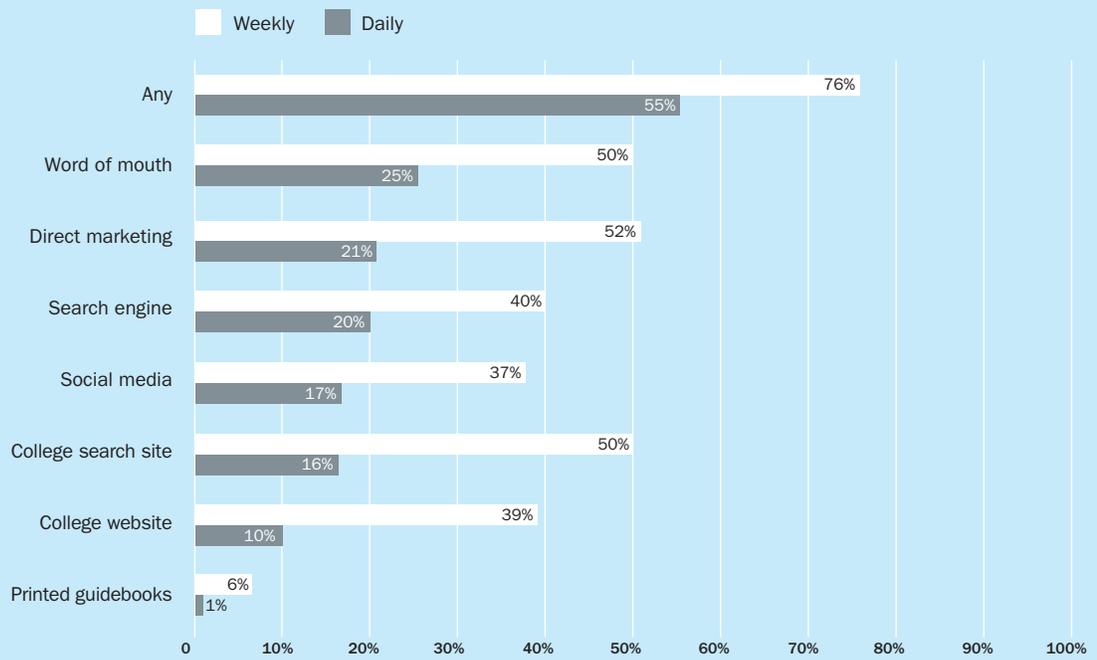
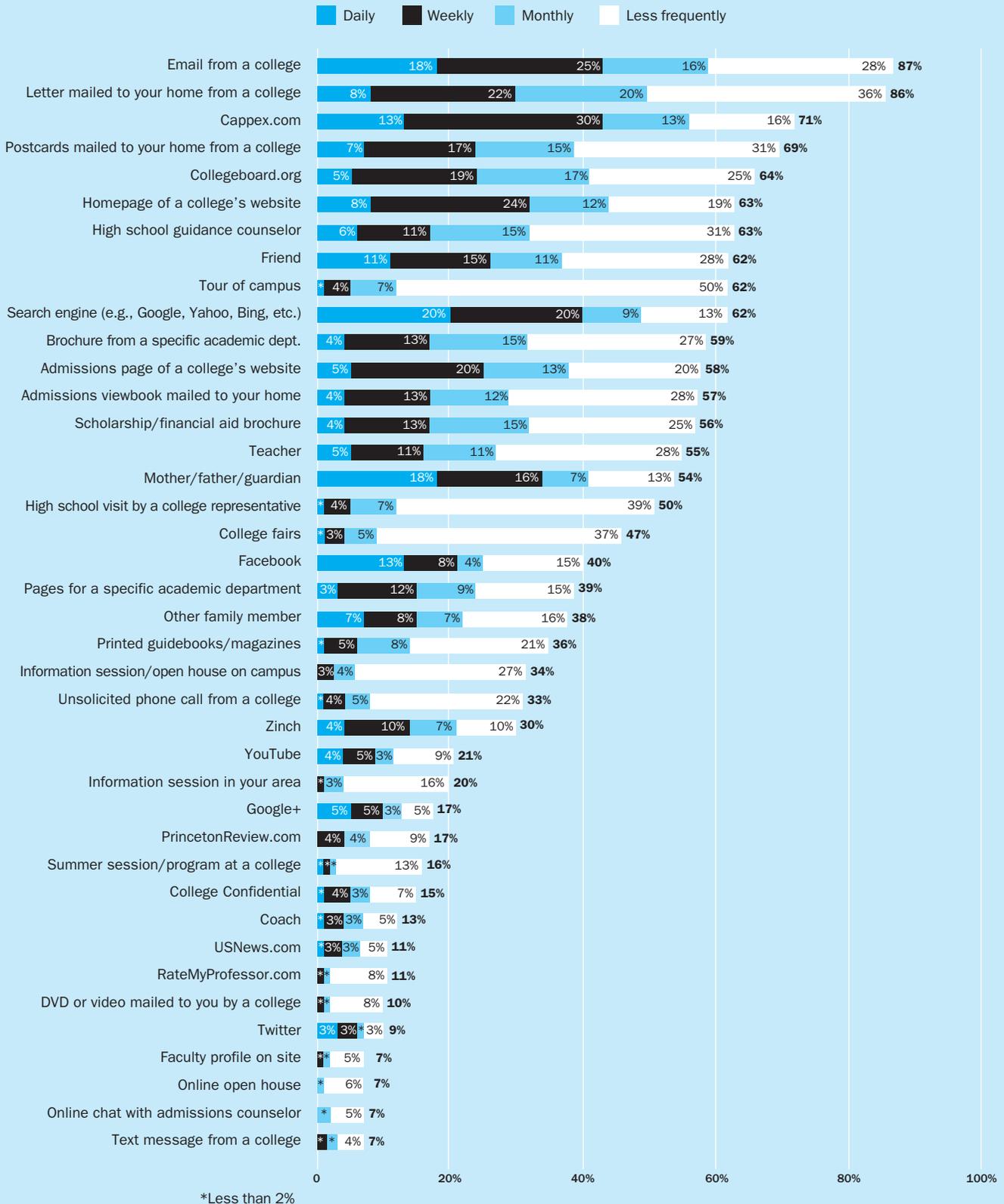


FIGURE 8

Frequency of information source usage

SOURCE: How frequently do you typically use each of the following in your college search?

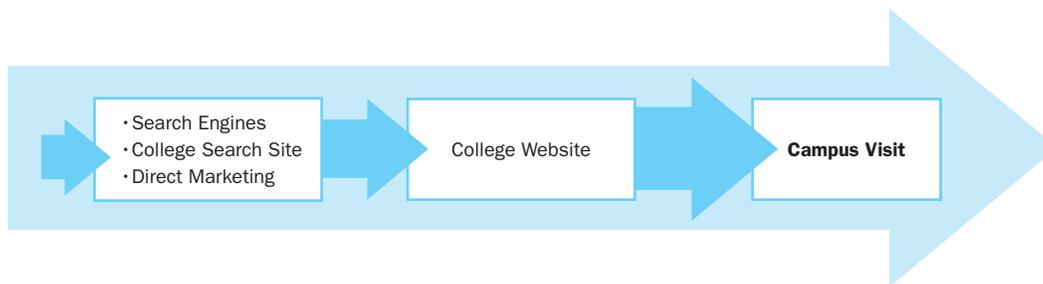
NOTE: Individual bars may not add up to total due to rounding.



Research Sources Play Different Roles in the College Search Process

Research sources play different roles at different decision stages.

We asked students to identify which marketing channels and information sources led them to take one of three actions in their college search: visiting a college’s website, attending an information session, or visiting a campus. For example, college search sites were influential in deciding which college websites to visit. In turn, those institutional sites helped students decide which campuses to visit. The college search sites act as building blocks in the investigation stage of the college decision process. They form a strong foundation, along with word of mouth and direct marketing, to get students to take the next step—visiting a college’s website.



Many paths lead to a college’s website.

More than three in four students learned about colleges by visiting institution websites. Knowing the importance of these website visits, we asked what sources of information students used to decide which institution websites to visit. Direct marketing played a key role in this regard; half of the students indicated that letters mailed to their home from a college (49%) or an email from a college (48%) were used when deciding which websites to visit. College search sites, such as Cappex.com (47%) and Collegeboard.org (40%) were also important in generating website traffic. Word of mouth was also important; 70 percent of students indicated that this channel was used in deciding which websites to visit.

“While letters and emails from colleges successfully drive students to action, their primary role is driving students to the college’s website. That central hub of information is where students decide if they want to visit campus or apply.

Despite the incredibly important role of online sources of information, direct mail is still one of the most effective means of reaching today’s students.”

Mark Nelson, Senior Vice President, Lipman Hearne

Information sessions as see-and-be-seen opportunities.

The research revealed that direct marketing and institution websites were influential when deciding which information sessions to attend. Letter from colleges (42%), email from colleges (42%), and homepage of website (41%) were the sources selected most frequently.

The all-important campus visit.

Few students enroll at a college they have never visited. So we asked students what information sources they used in deciding which campuses to visit. Institutional websites were very important in this respect. Forty-nine percent of students indicated that they visited the homepage and 37 percent indicated that they used the admissions page. Direct marketing, specifically letters mailed to their home from a college (41%), also played a key role. And, of course a student's mother/father/guardian (36%) was shown to be influential in deciding where to visit.

TABLE 3
Information channels used in making important decisions

SOURCES: Please indicate which of the following information sources you have used **to learn about colleges and universities**.

Please indicate which of the following information sources you used **to decide which campuses to visit**.

Which of the following information sources prompted you **to visit a college website**?

Please indicate which of the following information sources you used to decide **which information sessions to attend**.

NOTE: The graph aggregates 41 channels into seven types.

	Used when deciding			
	Used to learn about colleges	Which websites to visit	Which info sessions to attend	Which campuses to visit
College website	78%	47%	56%	63%
College search site	85%	64%	40%	47%
Social media	55%	18%	13%	14%
Search engine	62%	37%	21%	30%
Direct marketing	98%	72%	66%	63%
Word of mouth	93%	70%	60%	69%
Printed guidebooks	36%	13%	9%	13%

TABLE 4

Information sources used in making important decisions

SOURCES: Please indicate which of the following information sources you have used **to learn about colleges and universities**.

Please indicate which of the following information sources you used **to decide which campuses to visit**.

Which of the following information sources prompted you **to visit a college website**?

Please indicate which of the following information sources you used to decide **which information sessions to attend**.

	Used when deciding			
	Used to learn about colleges	Which websites to visit	Which info sessions to attend	Which campuses to visit
Email from a college	87%	48%	42%	35%
Letter mailed to your home from a college	86%	49%	42%	41%
Cappex.com	71%	47%	29%	32%
Postcards mailed to your home from a college	69%	34%	24%	26%
Collegeboard.org	64%	40%	24%	27%
Homepage of a college's website	63%	35%	41%	49%
High school guidance counselor	63%	30%	24%	23%
Search engine (e.g., Google, Yahoo, Bing, etc.)	62%	37%	21%	30%
Friend	62%	26%	18%	25%
Tour of campus	62%	25%	27%	31%
Brochure from a specific academic department of a college	59%	26%	19%	24%
Admissions page of a college's website	58%	28%	34%	37%
Admissions viewbook mailed to your home	57%	28%	20%	27%
Scholarship/financial aid brochure	56%	23%	17%	20%
Teacher	55%	23%	16%	19%
Mother/father/guardian	54%	31%	27%	36%
High school visit by a college representative	50%	21%	17%	18%
College fairs	47%	26%	20%	22%
Facebook	40%	13%	10%	10%
Pages for a specific academic department or major	39%	20%	19%	24%
Other family member	38%	15%	10%	15%
Printed guidebooks/magazines	36%	13%	9%	13%
Information session/open house on campus	34%	11%	13%	13%
Unsolicited phone call from a college	33%	7%	6%	5%
Zinch	30%	13%	7%	7%
YouTube	21%	6%	4%	6%
Information session in your area	20%	7%	6%	7%
PrincetonReview.com	17%	7%	4%	4%
Google+	17%	6%	4%	5%
Summer session/program at a college	16%	6%	6%	7%
College Confidential	15%	6%	4%	5%
Coach	13%	6%	5%	5%
USNews.com	11%	7%	4%	5%
RateMyProfessor.com	11%	1%	1%	1%
DVD or video mailed to you by a college	10%	3%	2%	3%
Twitter	9%	3%	2%	2%
Profile of a faculty member found on a college's website	8%	2%	1%	2%
Text message from a college	7%	1%	1%	1%
Online open house	7%	1%	2%	2%
Online chat with admissions counselor	7%	2%	2%	2%

Evaluating What Works: Implications for Colleges and Universities

Colleges can better leverage the most influential information sources.

One finding is abundantly clear: Super Investigators rely on an impressive number of sources to inform their college search process. How can we better see which sources are utilized most frequently—and which are highly influential but underutilized?

Figure 9 is designed to help readers visualize the relative usage and effectiveness of information sources. “Effectiveness” is what we’ve named the composite influence rating of information sources (the average usage in the decision of which websites to visit, which information sources to attend, and which campuses to visit).

Frequently used and highly influential sources are “must-do” communications vehicles. These included direct marketing, college homepage, search engines, select college search sites (Cappex.com, Collegeboard.org), campus tours, and guidance counselors. These tactics all require a continued investment in the interest of connecting with prospective students.

The analysis revealed three enhancement opportunities—sources that were highly influential to those students who used them, but that were used by less than 60 percent of students. These sources included parents, admissions viewbooks, and the admissions pages of a college’s website. Colleges can enhance students’ decision-making processes by:

- Making sure students know their parents are being embraced as part of the process, through content directed toward their parents (or toward the parents and students as a team);
- Evaluating the reach of sources such as viewbooks, ensuring they are seen by the appropriate students, and making sure the content is compelling;
- Revisiting admissions websites from the point of view of a prospective student—a person who has yet to make an emotional investment in a college and who is accustomed to streamlined, uncomplicated yet powerful user experiences elsewhere on the web.

Our analysis also revealed an “optimization” opportunity—a source that was frequently used but had relatively low influence rating: friends. Institutions have an opportunity to stimulate more influential peer-to-peer conversations via strategic messaging in online forums, social networking sites, and other places that students gather and talk.

FIGURE 9

Opportunities that leverage information sources

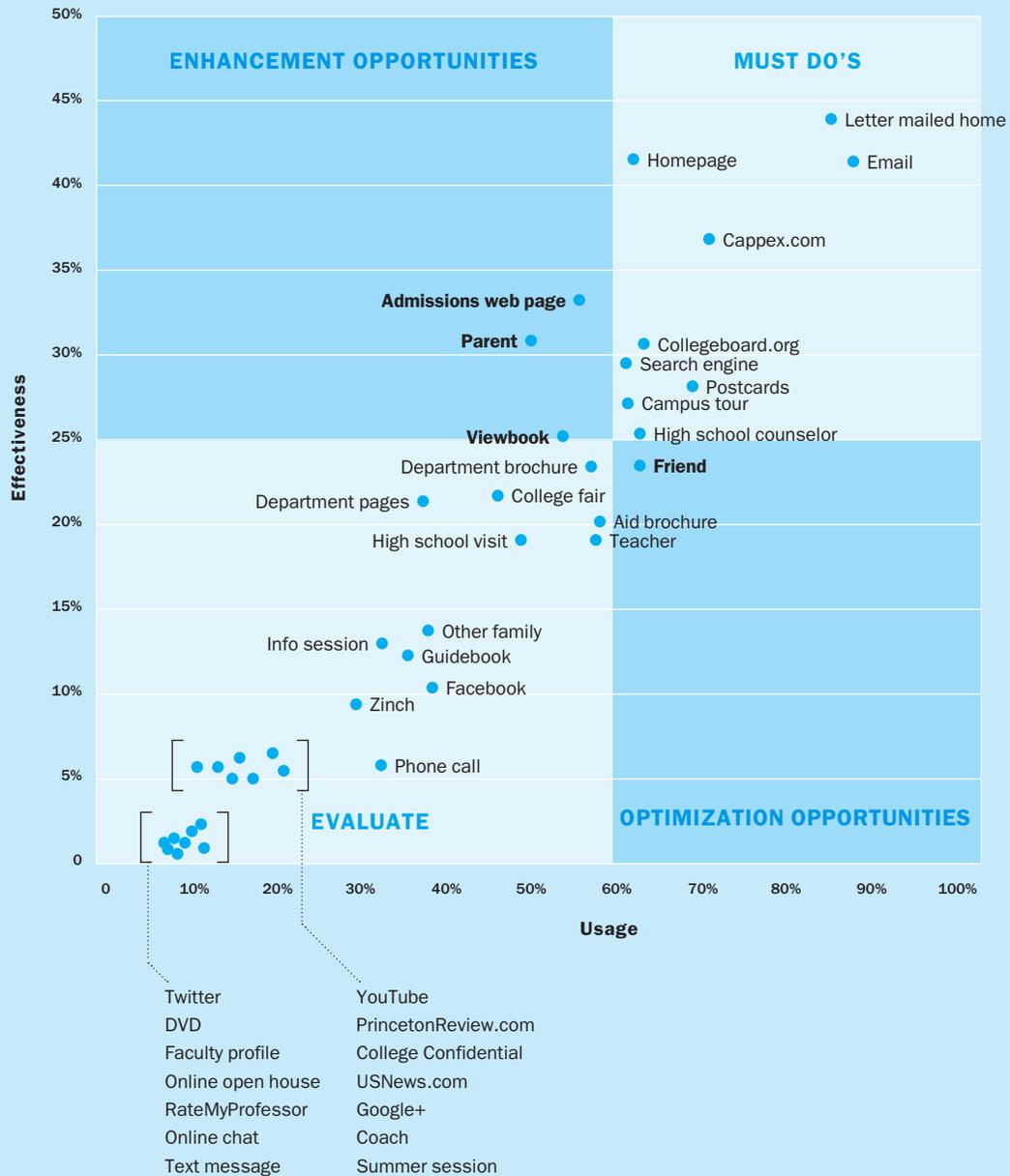
SOURCES: Please indicate which of the following information sources you have used **to learn about colleges and universities**.

Please indicate which of the following information sources you used **to decide which campuses to visit**.

Which of the following information sources prompted you **to visit a college website**?

Please indicate which of the following information sources you used to decide **which information sessions to attend**.

NOTE: "Percentage that found source influential" reflects the composite of the influence on the campus visit, website visit, and information session attendance.



“The truly social aspect of the search—word of mouth and advice from friends, parents, and other influencers—is also incredibly effective at driving students to explore a college further. Parents represent an untapped marketing opportunity for colleges. And while social media doesn’t seem to drive students to action, it can’t be overlooked. More than half the students use it to learn about colleges, and it’s where they are talking to their friends. Schools need to monitor comments made online and make sure the buzz is positive.”

Mark Nelson, Senior Vice President, Lipman Hearne

“I talk to everybody about college. Literally, I talk to my parents, friends, teachers—everyone—about college.”

Lipman Hearne Teen Panelist

When it comes to accessing information sources, timing is everything.

As can be expected, students tend to use certain information sources at different times throughout a long search process. Some sources are accessed during the early stages of college investigation and are not as widely used in junior or senior year. For example, advice from a parent or guardian guides students from the early stages of search, and search engines such as Google appear to be go-to online tools when most are narrowing their college preferences. Other sources, such as campus tours and college search sites are more likely to be leveraged starting junior year, when students are starting to get more serious about their options and are applying to and enrolling in the colleges of their choice.

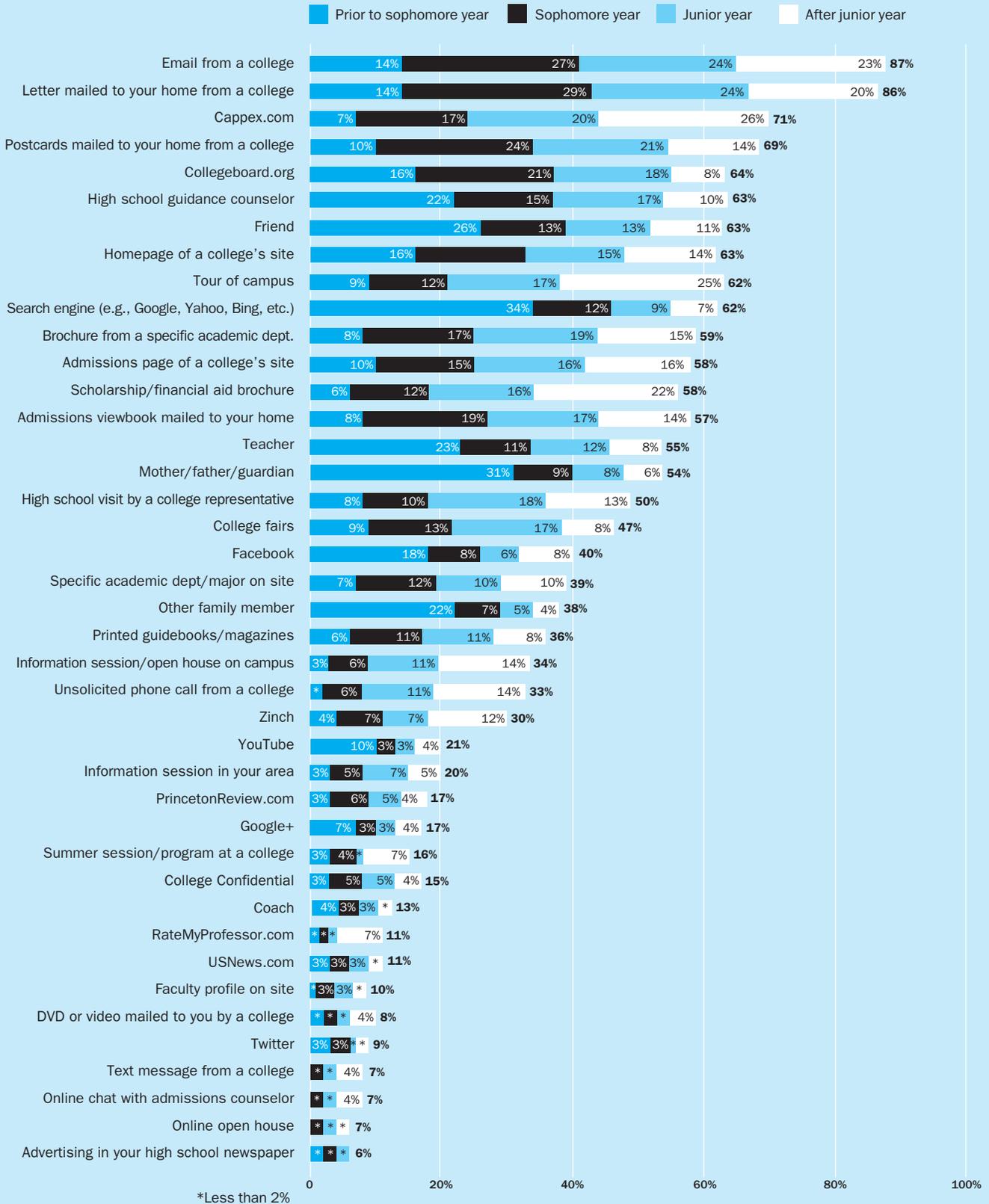
Information sources that first reach students late in the search process may be those that pertain to very specific decision-making steps—most notably, financial aid brochures. Given how highly students rank financial aid and affordability as essential characteristics in a college, it may be advantageous to put a resource like this in the hands of students (and parents) earlier in the process.

FIGURE 10

When first used information sources

SOURCE: When did you first start using each of the following?

NOTE: Individual bars may not add up to total due to rounding.



Stealth Applicants and the College Search

Stealth applicants apply to colleges under the radar of admissions teams. Their behavior is of particular interest because their unexpected applications can complicate schools' admissions planning and projections. As the table below describes, there was little difference in the priorities of stealth students and the priorities of the average student.

TABLE 5

Rank order of most important characteristics when thinking about "good fit": Stealth students	
1	Offers good scholarships and financial aid packages to students
2	Strong academic reputation
3	Major I am interested in has a strong academic reputation
4	Helps graduates get good jobs
5	Offers wide variety of majors and academic programs
6	Tuition and fees are affordable
7	Offers global experiences such as study abroad
8	The campus is safe
9	High ranking in <i>U.S. News & World Report</i> or other publications
10	The faculty are committed to excellence in teaching undergraduate students

Stealth applicant behavior.

Twenty-three percent of the graduating seniors we surveyed applied "stealth" to at least one of their preferred colleges. This prompts the question: Why would a student ever apply to a college without first letting it know he/she was interested? In general, students only applied to colleges that they hadn't visited or reached out to under certain circumstances. For example, they were more likely to apply "stealth" if the school:

- Had a free application
- Had an easy application
- Is a safety school
- Advertised scholarships
- Is the alma mater of a family member
- Is prestigious/well-known
- Is recommended by a counselor
- Is far away from their hometown

We asked those graduating seniors to identify what actions they took when submitting a stealth application. Seventy-four percent of the stealth applicants we surveyed used college search sites. We often think of stealth applicants as conducting their entire search online, but according to the Super Investigators we surveyed, prospective students may be visiting campuses unofficially off the radar of college admissions even before applying. Admissions teams that are interested in uncovering and connecting with stealth students may want to require website visitors to supply simple contact information such as name and email address in order to access certain sections of the admissions website.

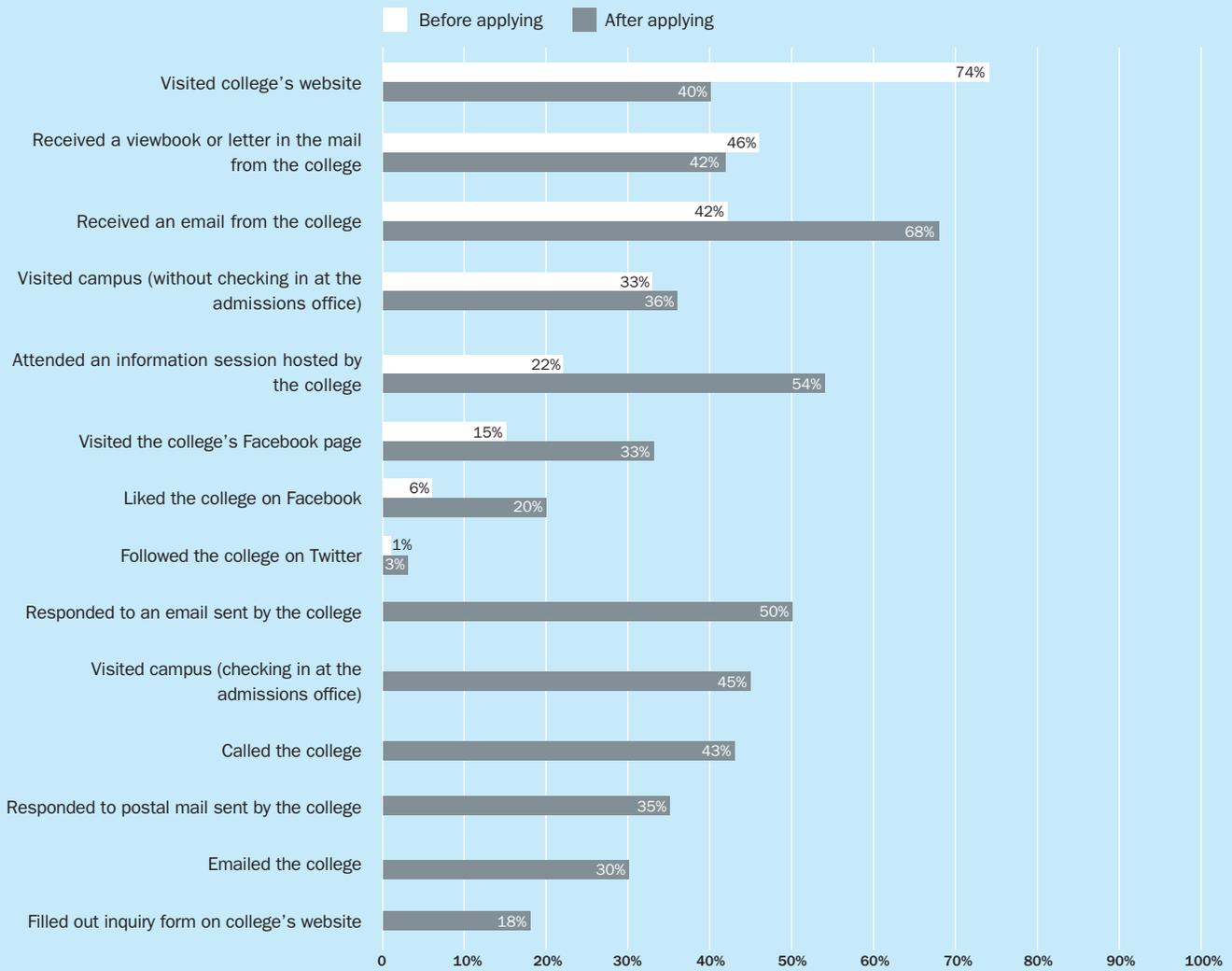
“It’s clear that stealth applicants are investigating the colleges they are applying to, both before and after application. Colleges need to rethink their ‘suspect’ communications and outreach, considering that these students are watching and listening, but will not tell you they are interested. Therefore, colleges should reach out to these students in a more focused way, once they receive their application.”

Tom Abrahamson, Chairman, Lipman Hearne

FIGURE 11

What do stealth applicants do to learn about colleges?

SOURCE: When did you first start using each of the following?



Special Populations

Transfer Students

Transfer student preferences.

For the most part, transfer students were looking for many of the same qualities and characteristics as first-time college students. They named affordable tuition and fees, good scholarships and financial aid packages, and a strong academic reputation for their major as their top priorities when selecting a college. Differences did emerge, however, among second-tier priorities. Transfer students placed a higher value on study abroad experiences and were also more inclined to prefer a location close to their hometown. Characteristics that did not emerge as priorities for this population at large: significant on-campus student life experiences, and experiential learning opportunities such as internships.

TABLE 6

Rank order of most important characteristics when thinking about “good fit”: Transfer students	
1	Tuition and fees are affordable
2	Offers good scholarships and financial aid packages to students
3	Major I am interested in has a strong academic reputation
4	The campus is safe
5	Offers global experiences such as study abroad
6	Strong academic reputation
7	Helps graduates get good jobs
8	The faculty are committed to excellence in teaching undergraduate students
9	Located close to my hometown
10	Offers a wide variety of majors and academic programs

TABLE 7

Rank order of most important characteristics when thinking about “good fit”: First-time students	
1	Offers good scholarships and financial aid packages to students
2	Major I am interested in has a strong academic reputation
3	Tuition and fees are affordable
4	Strong academic reputation
5	Helps graduates get good jobs
6	The campus is safe
7	Offers a wide variety of majors and academic programs
8	Offers many social activities, intramural athletics, student organizations and other opportunities to get involved on campus
9	The faculty are committed to excellence in teaching undergraduate students
10	Offers significant experiential learning opportunities such as internships

Transfer students: the self-directed search.

The majority of transfer students were actively engaged online in the college search on a weekly basis. This suggests that first-time students had a lot of information pushed at them from colleges and influencers, while transfer students were conducting a more targeted and efficient search. It also suggests an opportunity for colleges to be more proactive in connecting with transfer students.

Opportunities to influence transfer students.

We saw some differences between first-time and transfer students in terms of their usage of particular channels of information. Unlike freshmen enrolling from a high school path, who relied heavily on direct marketing and word of mouth to learn about colleges, transfer students relied on search engines, college search sites, and college websites. This indicates that very influential channels, including word of mouth and direct marketing, are going unused, and that schools interested in reaching transfers should build local brand awareness and increase investment in reinforcement programs like out of home.

“ Schools do a lot of marketing to prospective freshmen coming straight from high school. In contrast, transfer students are more on their own. Right now, they are actively seeking out information, but it’s a one-way street because colleges aren’t as resourceful as they could be with regard to outreach and marketing to transfer students, particularly via online channels. There’s clearly an opportunity for more focused attention on transfer students.”

Mark Nelson, Senior Vice President, Lipman Hearne

FIGURE 12

Type of information channels used every week

SOURCE: How frequently do you typically use each of the following in your college search?

NOTES: Percentages reflect daily or weekly usage. The graph aggregates 41 channels into seven types.

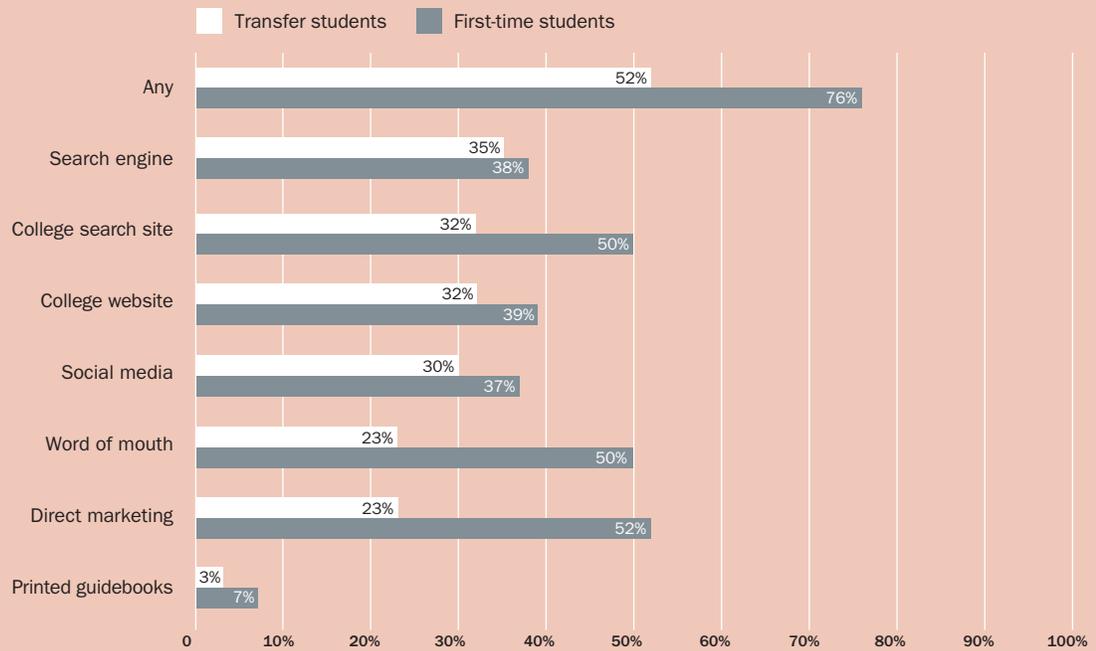


TABLE 8

Transfer students: Information channels used in making important decisions

SOURCES: Please indicate which of the following information sources you used **to decide which campuses to visit**.

Which of the following information sources prompted you **to visit a college website**?

Please indicate which of the following information sources you used **to decide which information sessions to attend**.

NOTE: The chart aggregates 41 channels into seven types.

	Deciding which college websites to visit	Deciding which info sessions to attend	Deciding which campuses to visit
Word of mouth	54%	54%	56%
Direct marketing	50%	51%	61%
College website	44%	56%	64%
Search engine	40%	16%	39%
College search site	38%	22%	31%
Social media	23%	16%	18%
Printed guidebooks	4%	6%	10%

MORE INFO AVAILABLE

International Students

Reputation and job preparation are sweet spots for international students.

Obviously, international students rank global study abroad opportunities high on their list of good fit schools. They pay more attention to the *U.S. News & World Report* rankings and are more concerned that an institution is of high repute than domestic respondents.

TABLE 9

Rank order of most important characteristics when thinking about “good fit”: International students	
1	Offers good scholarships and financial aid packages to students
2	Strong academic reputation
3	Major I am interested in has a strong academic reputation
4	Helps graduates get good jobs
5	Offers wide variety of majors and academic programs
6	Tuition and fees are affordable
7	Offers global experiences such as study abroad
8	The campus is safe
9	High ranking in <i>U.S. News & World Report</i> or other publications
10	The faculty are committed to excellence in teaching undergraduate students

International students as “Super-ultra Investigators.”

International students were highly engaged in the college search. Similar to domestic students, the search was a continuous process for them. In addition to direct marketing, international students were frequently engaged in independent research—using college search sites, word of mouth, search engines, college websites, and social media. In fact, international students used a wider variety of channels on a weekly basis than did domestic students.

Sources that influence international students.

International students placed a lot of weight on college search sites, deeming them the most influential source in deciding which college websites to visit and which information sessions to attend. College search sites also played an important role in determining which campuses to visit.

FIGURE 13

Type of information channels used every week

SOURCE: How frequently do you typically use each of the following in your college search?

NOTES: Percentages reflect daily or weekly usage. The graph aggregates 41 channels into seven types.

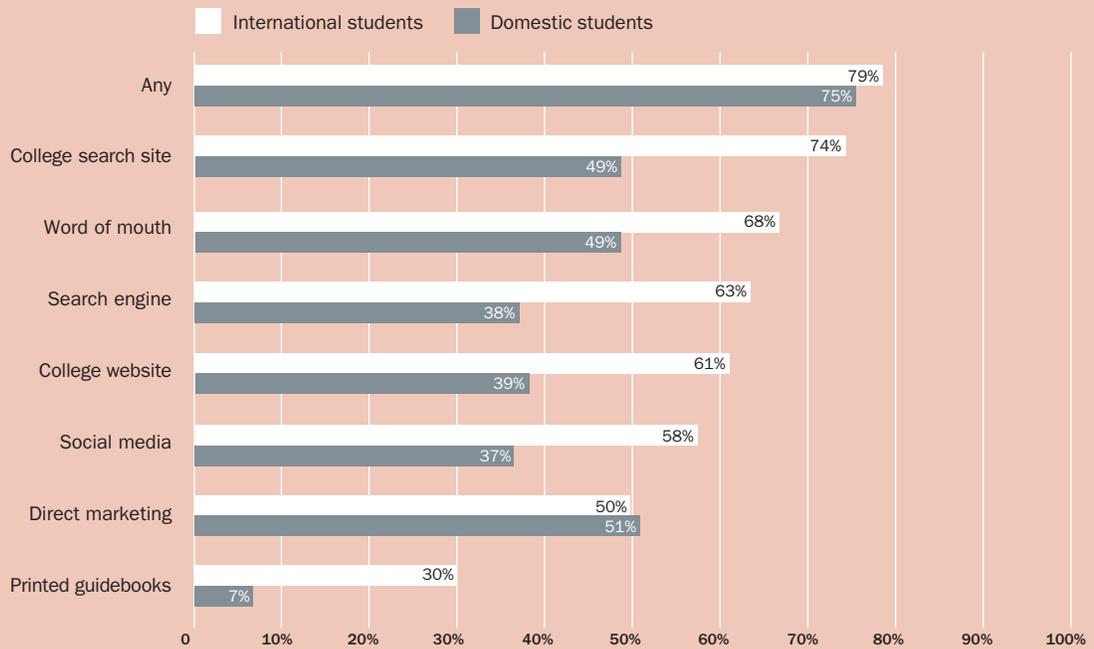


TABLE 10

International students: Information channels used in making important decisions

SOURCES: Please indicate which of the following information sources you used **to decide which campuses to visit**.

Which of the following information sources prompted you **to visit a college website**?

Please indicate which of the following information sources you used **to decide which information sessions to attend**.

NOTE: The chart aggregates 41 channels into seven types.

	Deciding which college websites to visit	Deciding which info sessions to attend	Deciding which campuses to visit
College search site	79%	64%	67%
Word of mouth	76%	50%	62%
Direct marketing	66%	55%	67%
College website	55%	64%	71%
Social media	52%	9%	24%
Search engine	45%	23%	52%
Printed guidebooks	14%	14%	10%

Advertising and the College Decision

Advertising and the College Decision

Students notice advertising—and it impacts their decision.

The majority of respondents had seen an advertisement for one of their preferred colleges (58%), with online/banner ads and billboard ads being the two types most frequently noticed. These types of ads appear to be memorable, as two in three students who reported seeing an ad were able to recall its main message. And they were impactful as well. In the end, nearly half of the students surveyed indicated that they had a more favorable impression of their preferred college or university based upon advertising and that it impacted their decision (45%).

The majority of respondents indicated that advertising “led them to learn more about a college”; 55 percent indicated that they learned more about a college they weren’t familiar with as the result of advertising, and 53 percent indicated that they learned more about a college they already knew as a result of advertising. Many students indicated the advertising influenced/reinforced how they felt a college’s reputation and first made them aware of a college (49% each). In the end, more than one in three graduating seniors indicated that advertising influenced their application decision or influenced their enrollment decision.

“Advertising by colleges has been increasing, and while it’s not always focused on prospective students, it’s clear that advertising is having a positive impact on student recruitment. As one would expect, online ads were the most likely to be recalled, in part because they are the most likely to be used. That said, it’s important that a college’s objectives, strategies, target usage habits, and nature of their message all be considered when developing a paid media strategy.”

Mark Nelson, Senior Vice President, Lipman Hearne

TABLE 11

Assessment of advertising for preferred college(s)

SOURCES: Have you seen any of the following types of advertising for [COLLEGE]? What impact, if any, did the [AD TYPE] have on your impression of [COLLEGE]? What were the main messages that you recall from [COLLEGE]'s [AD TYPE]?

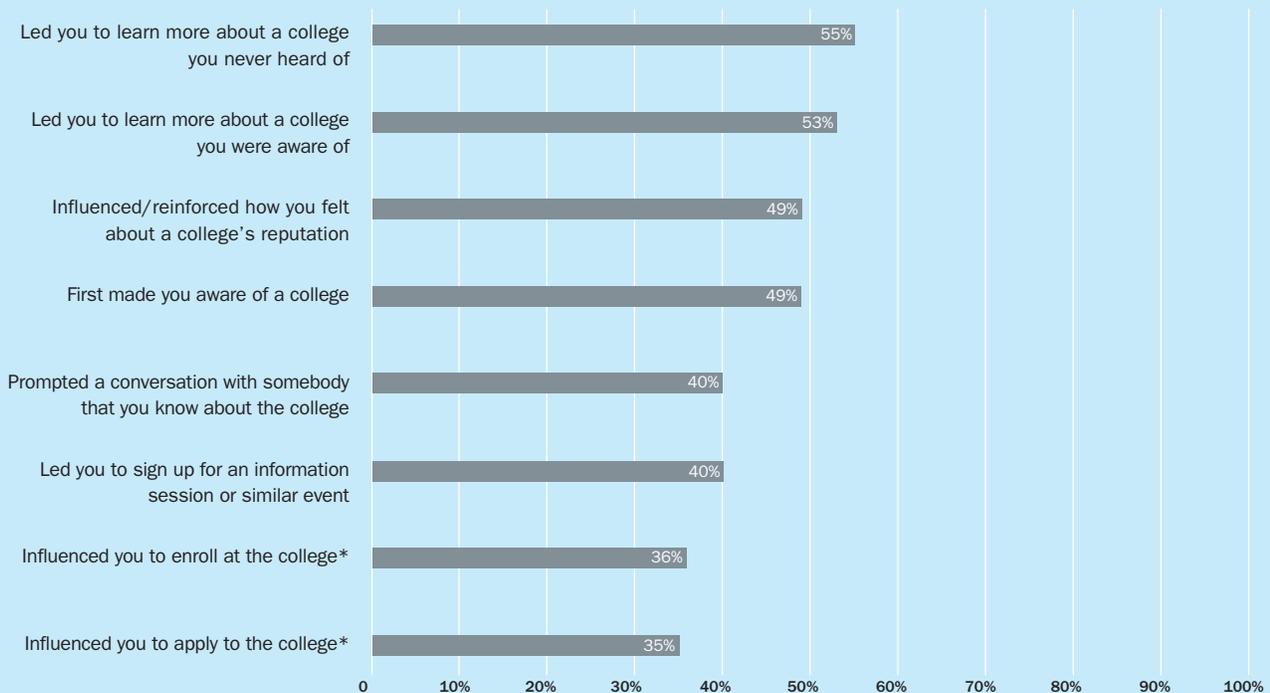
NOTE: We asked respondents what types of ads they had seen "for their preferred colleges," not for any college. As such, the results are not only skewed by what type of media colleges choose, but also by what type of media their preferred colleges use to advertise.

	Seen for preferred college(s)	Recall ad's main message	More favorable as a result
Any	58%	40%	45%
Online/banner ads	56%	31%	35%
Billboard ads	27%	13%	11%
TV ads	25%	15%	12%
Newspaper ads	19%	9%	8%
Radio ads	13%	6%	4%
Transit ads	13%	6%	4%

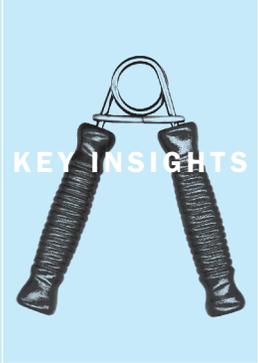
FIGURE 14

Advertising led students to engage or think about college in following manner

SOURCE: Many colleges use advertising as a way to engage prospective students. Which types of advertising, if any, have led you to engage or think about a college in the following manner?



*Asked of graduating seniors only



KEY INSIGHTS

A research white paper

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