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TopUniversities.com

Students Online: Global Trends

How do prospective students use digital resources to research higher education?



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ABOUT THE REPORT

The rapid evolution of digital technologies and media over the past few decades has transformed approaches to communication, information-seeking, and decision-making in all areas of life. This new and constantly advancing digital landscape is having a major impact on the way prospective students assess and compare educational options, and the sources that influence their final choices.

To explore the impact of changing digital technologies on the student decision-making process, in 2013 QS launched a dedicated global survey of prospective international students. Survey respondents are attendees of QS World Grad School Tour events around the world, typically preparing to apply for a master's or PhD, with a majority interested in studying abroad.

These students' presence at the events in itself indicates that more traditional forms of researching universities – through face-to-face meetings and information sessions – are far from obsolete. Yet their responses to the survey reflect growing reliance on an ever-more diverse array of online platforms, including official university sites and rankings, but also social networks and other peer-to-peer outlets.

This year's report is based on responses from more than 5,400 prospective students, at events in 56 cities across 33 countries in Europe, Asia, North America, Latin America and Africa. This is more than double the number of responses collected in the previous year, adding to the authority and significance of the results.

Overall, the trends identified this year show good consistency with those of the first edition of the report, lending weight to those initial findings and recommendations. Over the coming years, as the survey expands in reach, this growing body of comparative data should serve as a useful steering point for universities keen to stay attuned to the expectations and demands of each new intake of applicants.

METHODOLOGY AND SURVEY DEMOGRAPHICS

The survey was conducted via a paper-based questionnaire distributed to attendees of the QS World Grad School Tour in 2014 and 2015. A total of 5,413 responses were collected from 56 cities in 33 countries across Europe, Asia, North America, Latin America and Africa. This is double the number of survey respondents compared to the previous year (the 2013-14 survey had 2,215 respondents).

A breakdown of responses by world region shows 43% collected from prospective students in Europe, 29% in Asia, 14% in Latin America, 10% in the US and Canada, and 4% in Africa.

This year's survey had slightly more male than female respondents (51/49%), compared to last year's ratio (45/55%).

The events at which the survey was conducted were focused on students applying to postgraduate-level courses. The majority of survey respondents (69%) were looking to apply to master's programs, with 7% interested in PhD study, and a further 7% interested in other postgraduate programs. The remaining 17% were predominantly interested in undergraduate degrees. This breakdown in program interests is reflected in the age of respondents, with the majority of respondents aged 22-25 (40%) or 26-29 (28%). A further 9% were aged 17 or younger, 11% aged 18-20, and 11% aged 30 or older.

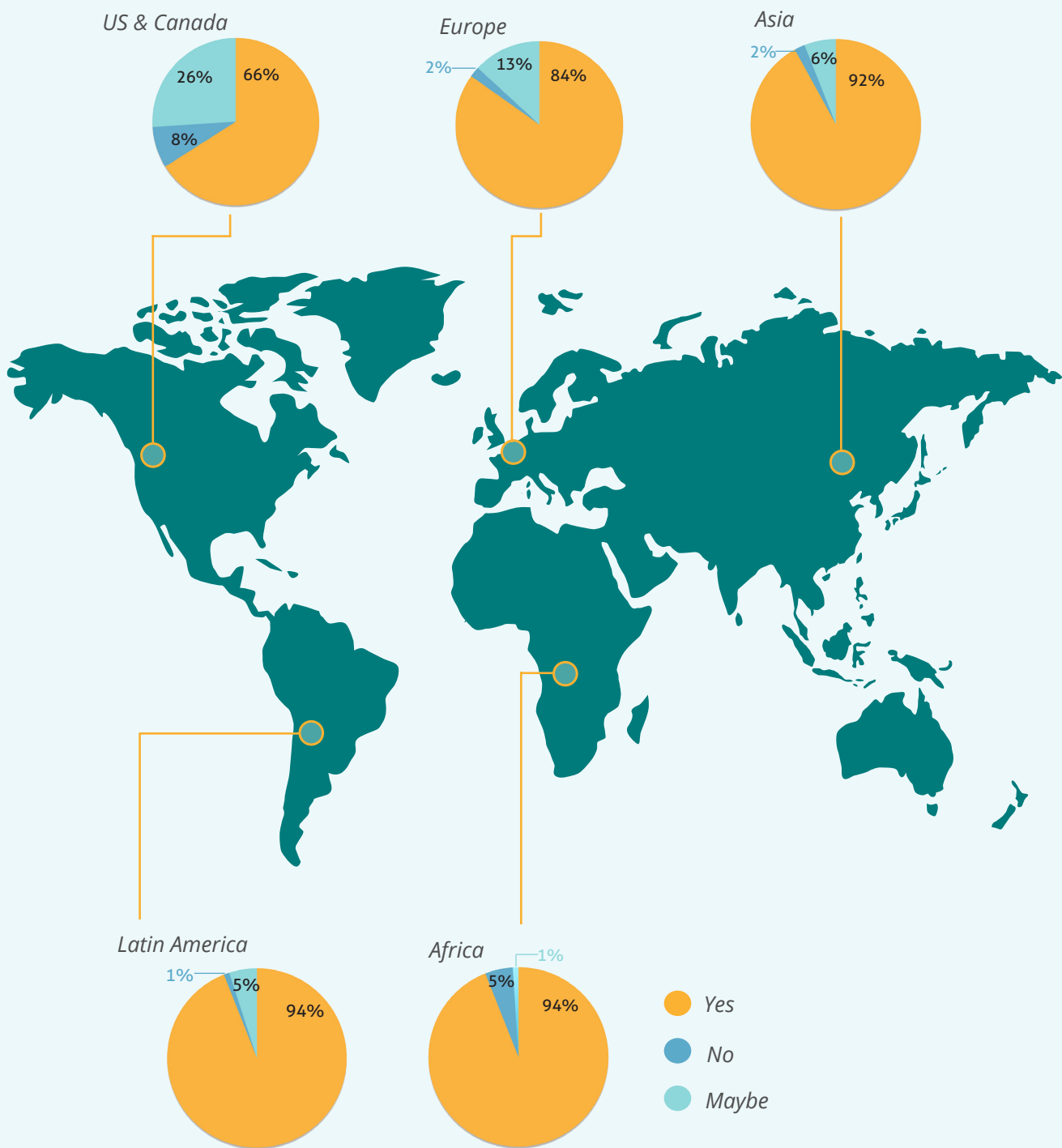
The smaller number of respondents from the US/Canada and Africa, as well as those at either end of the age spectrum (17 and under, 30 and over), indicate that a degree of caution should be exercised when considering findings specific to these groups. In the other categories, there are between 500 and 2,000 respondents for each question, giving greater robustness to the trends explored.

The vast majority of respondents were actively considering studying abroad (86%), with only 3% actively dismissing the idea. The youngest and oldest respondents were comparatively less likely to be considering this option; 71% of those in the youngest age category and 76% of those aged 30+ were intending to pursue international programs. There were also geographic trends in this preference, with respondents in the US and Canada less likely to be interested in study abroad, and those in Latin America and Africa most likely.

When respondents were asked if they would consider online study, there were some distinctly varied results. The general trend was fairly negative, with only 12% saying yes, 29% maybe, and 59% no. However, older respondents were clearly more interested in online study, with 30% saying yes and a further 35% maybe.

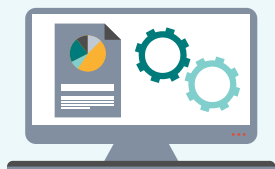
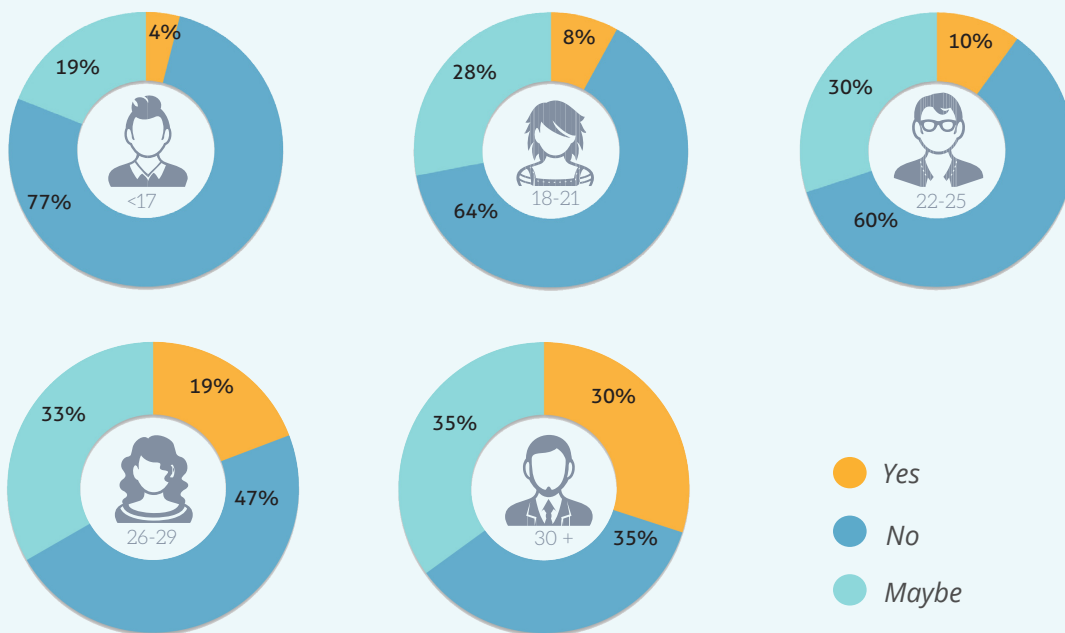
SURVEY DEMOGRAPHICS

Image 1: Would you study abroad?



SURVEY DEMOGRAPHICS

Image 2: Would you study online?



KEY FINDINGS

This report reinforces many of the key trends identified last year, with the increased validity of a greater sample size (an increase from 2,215 to 5,413 responses), while also highlighting some year-on-year changes.

Online and offline resources both remain important to potential candidates, with 66% of respondents rating them equally important. The number of respondents who favor online resources declined year-on-year from 30% to 24%, while those favoring offline sources of information increased from 6% to 10% — further emphasizing the continued importance of offline resources. The trend identified in 2014 for older candidates to favor online over offline sources is this year reinforced, with 29% of those aged 30 or over indicating a preference for online, while only 16% of respondents 17 or under state this preference.

The importance of social media to respondents' interactions with universities remains ambiguous. There is a slight year-on-year increase in respondents who regard social media as “essential” or “very important” in their search for information, from 30.5% to 36%. There is also a small decline in the numbers who say they don't use social media at all in this context, or regard it as unimportant, from 38% to 35%. There are distinct geographic differences, with respondents in the US and Canada less likely to regard social media as an important component of their research, while those in Asia and Africa are the most likely.

Email remains the vastly preferred method for contacting (69%) and being contacted by (72%) universities. It is surprising then, that only 52% of respondents say they currently use email for this purpose. And while 9% of respondents say they have used social media to contact universities, only 5% view it as their ideal method, and only 3% ideally want to be contacted by universities this way. Possible explanations for these discrepancies include difficulty in locating email contact details, or experience of slow email response times which may prompt candidates to try other channels.

Trends in the adoption and use of online resources are complicated by age and geography. Respondents in Asia and Africa are more likely to rely on online resources in their research, perhaps because of more limited access to offline resources. Younger respondents are more likely to use social media channels, but are also more likely to prefer or see offline resources as equally important in their research. Older respondents are more likely to favor online resources, and while less likely to use social media, are more likely to consider online education.

SECTION 1: MOST-USED ONLINE RESOURCES AND DEVICES

Online versus offline resources

As was found in the 2014 report, the majority of respondents (66%) this year said they regard online and offline resources as equally important when researching higher education options. The percentage of those who favored online resources dropped slightly from the previous year, from 30% to 24%, while those favoring offline increased from 6% to 10%.

This trend was repeated when respondents were categorized by gender. Female and male respondents favoring offline resources increased respectively from 5% to 9%, and 6% to 11%, year-on-year.

When viewed by geographic region, the results are also generally consistent with the overall trend, although respondents in Africa reported greater reliance on online resources, with 33% of respondents saying they favored this resource. This was, however, a distinct decline from 48% in 2014. In Asia, it was interesting to note that 16% of respondents favored offline resources.

The most distinct trend, as in 2014, is the high level of importance placed on online resources by older respondents. This trend is repeated in 2015, with a graduated increase across the age groups which sees the percentage of respondents rating online resources as most important almost double, from 16% for the 17 and under group, to 29% for the 30 and over group.

These findings indicate that offline resources certainly continue to be of high importance in prospective students' decision-making. In particular, younger respondents, perhaps requiring information in a format that is easy to share with families and friends, are likely to say they find offline resources most useful. Conversely, older respondents may feel more adept and confident in extracting information they need from online resources.

Image 3: Would you say online or offline resources are more important in helping you make decisions about your education?

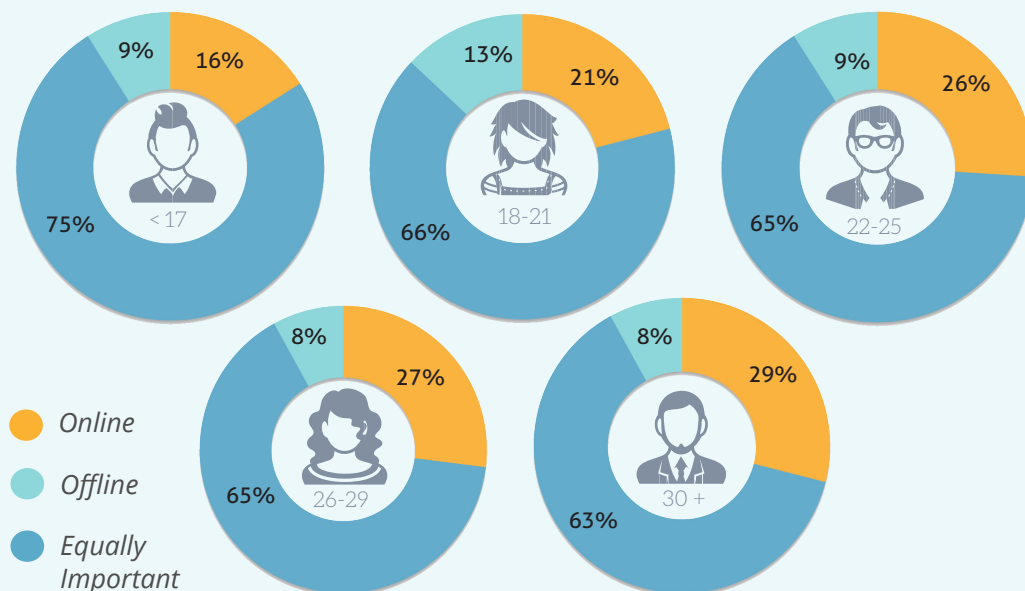
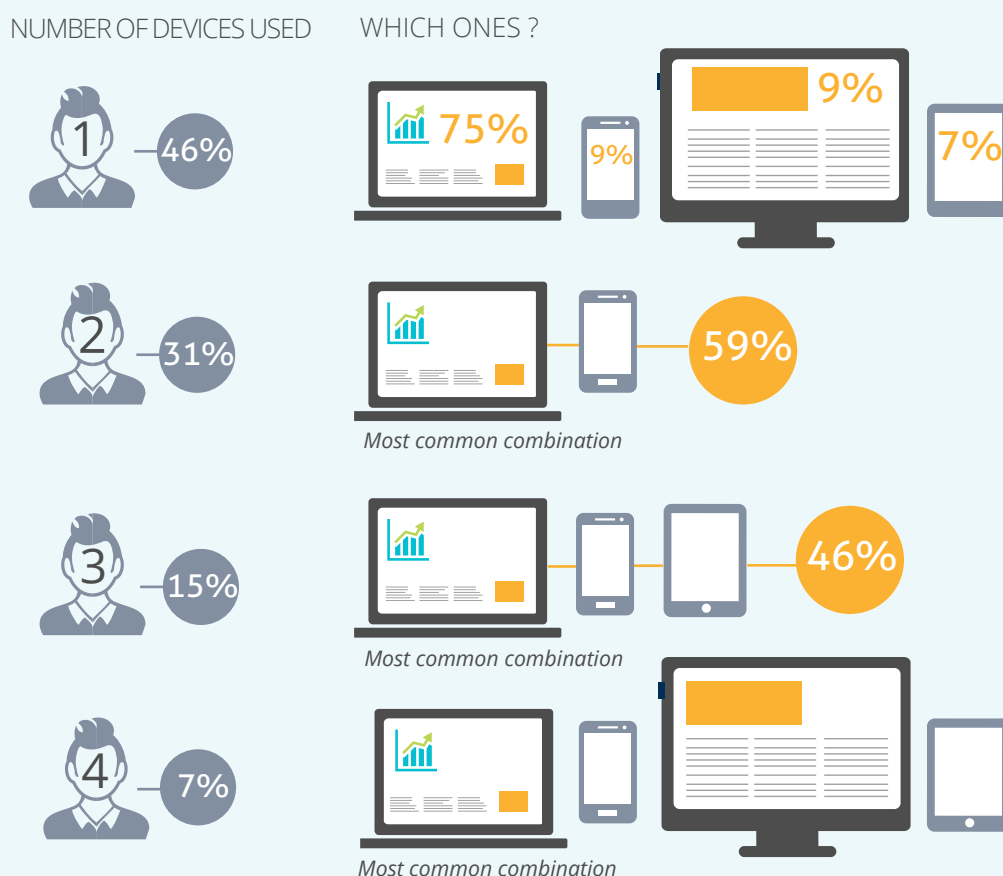


Image 4: Which devices do you use when researching universities and courses?



Most-used devices

Respondents were asked which devices they used to undertake their research. Unsurprisingly the laptop was the most widely used (45%), followed by smartphones (25%), desktops (15%) and tablets (14%). These responses replicate the findings in 2014. Almost half (47%) of respondents reported using just one device, 31% two devices, 15% three devices, and 7% all four device types.

The most common combination of devices is laptop and smartphone, followed by laptop, smartphone and tablet. A slight decline in the usage of smartphones is apparent as respondents' age increases, with 27% of the younger age groups (17 and under, 18-21) using this device, compared to 23% of those 30 and over. The older age groups are slightly more likely to use desktops and tablets.

There is some geographic differentiation, particularly among African respondents, where the use of smartphones is higher than average (31%), while laptop use is lower than average (39%). This is similar to findings in 2014. Clearly cost and availability of devices continues to affect the adoption of devices by prospective students of different ages, backgrounds and locations.

Importance of different online resources

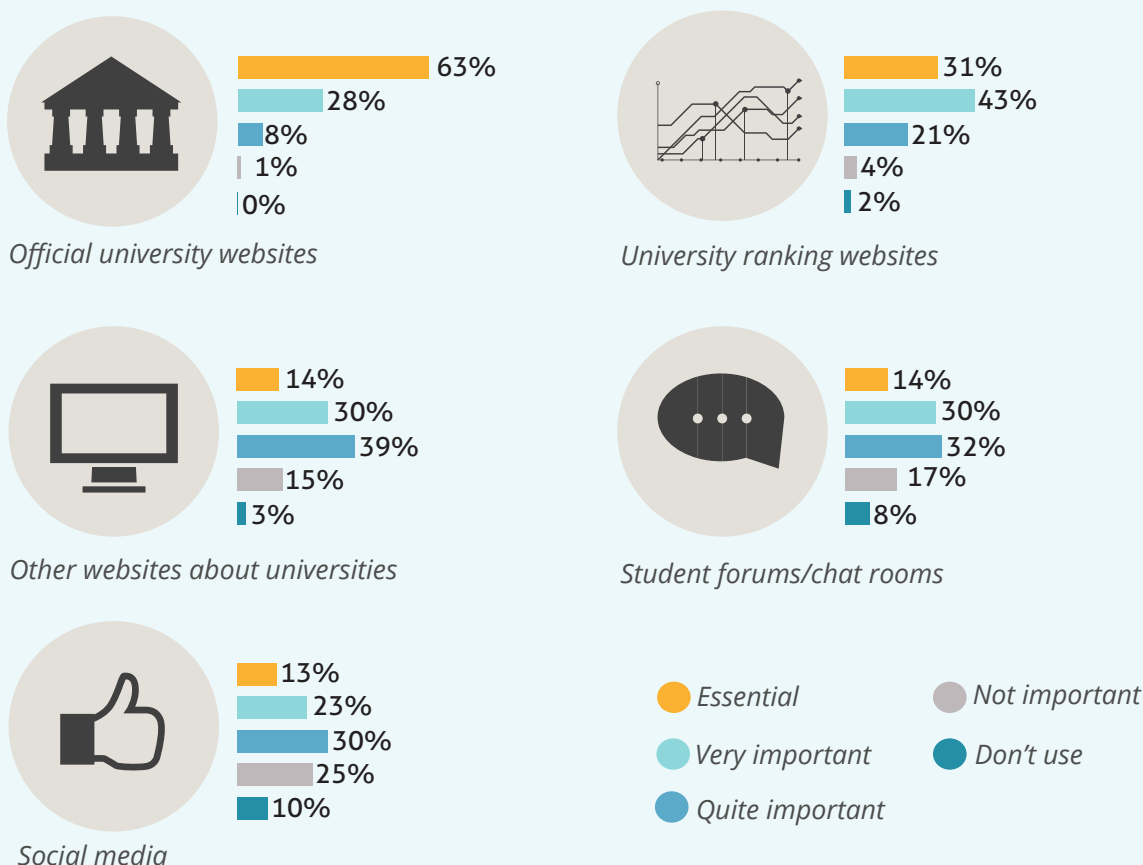
The survey asked respondents to rate the importance of five categories of online resource, when researching higher education options. The categories were: official university websites, university ranking websites, other websites about university study, student forums and chat rooms, and social media. As was found last year, the responses show that each resource is used to some extent by prospective students, but with a clear hierarchy in the importance attached to each.

Official university websites are clearly the most widely used, regarded by 91% of prospective students as essential or very important in their research. University ranking websites are next in the hierarchy, with 74% of respondents regarding them as essential or very important. Other specialized web resources dealing with higher education are a lower priority, with only 44% rating them as essential or very important.

Student chat rooms/forums and social media are only regarded by 14% and 13% of respondents as essential. Indeed, 8% and 10% respectively said they did not use these resources at all, the highest no-usage rate among all the resource types. However, a majority of respondents nonetheless attach some importance to these resources in their research.

These trends are very similar to those reported in 2014. There are some small differentiations based on region, with 38% of Asian and 39% of African respondents regarding ranking websites as essential, and 20% of respondents from these regions regarding student forums as essential. This suggests respondents in these regions are even more likely to draw on a full range of online resources, possibly because they have more limited access to offline resources such as open days or university fairs. Very little differentiation is seen between respondents based on age.

Image 5: How important are these online resources when researching universities and courses?

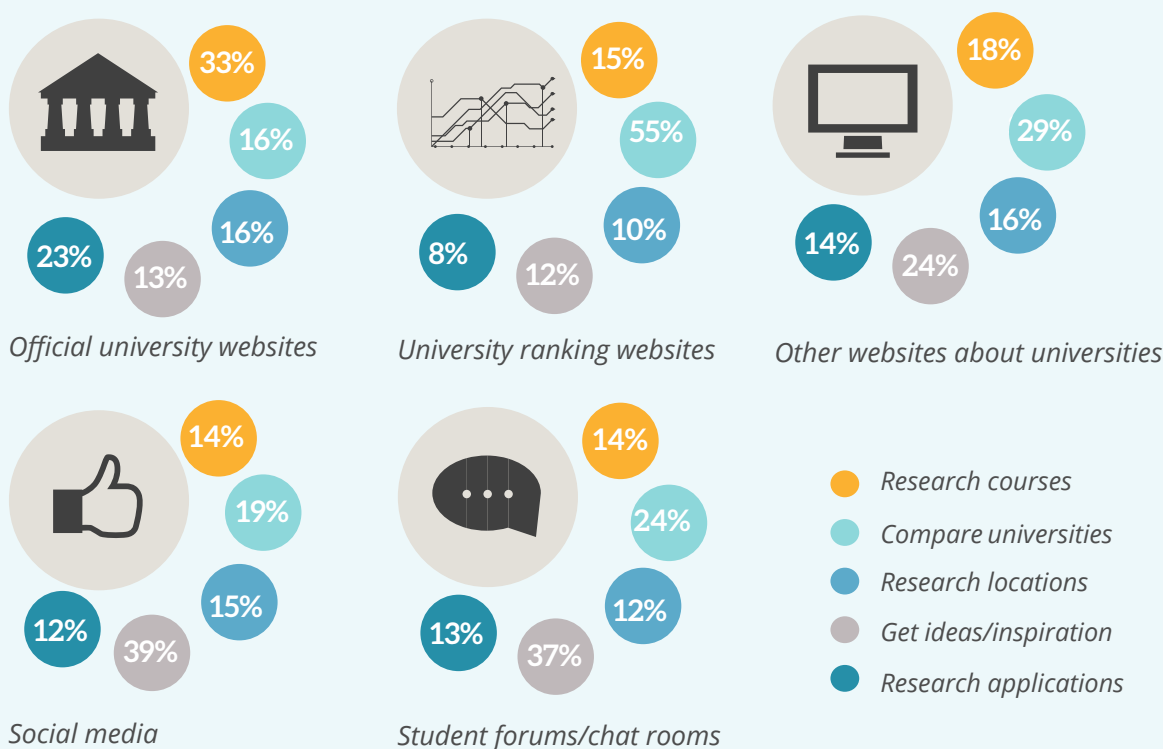


Usage of different online resources

Different types of online resource are used by prospective students to elicit different types of information. Official university websites are mostly used to find information on courses (33%) and details about funding and application processes (23%), while rankings websites are predominantly used to compare universities (55%). Social media and student forums are both mainly used as generators of ideas (39%; 37%), as well as offering further opportunities to compare options (19%; 24%). Other websites about universities, provided by a range of organizations, are used for the full range of information. These trends are very similar to those found in 2014.

These findings show that although prospective students draw on a range of resources to research their study options, there are clearly preferred online destinations for each informational category. Information about a specific option, which needs to be accurate and up to date – such as details of courses, admissions and fees – is primarily sought from official sources (ie. university websites). Similarly, to make robust comparisons between institutions and offers, rankings are most often used. Opinions and ideas are most likely taken from the more informal sources, via social media and forums.

Image 6: What do you use each online resource for when researching universities and courses?



Hardest-to-find information

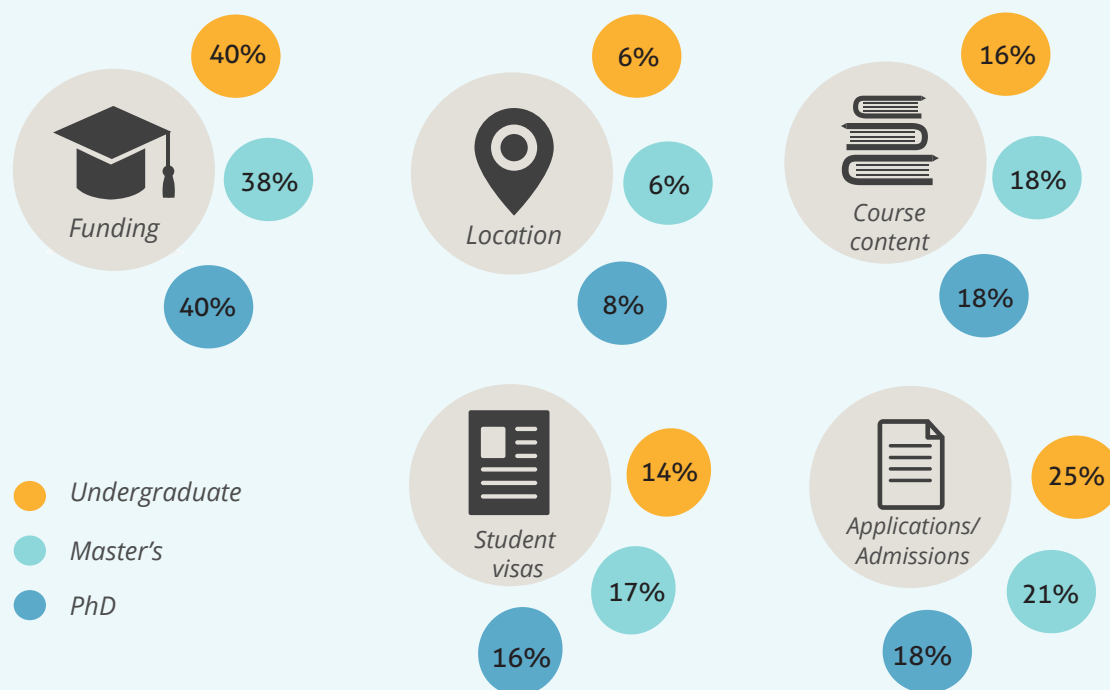
It is notable that respondents reported information on scholarships and funding as the most difficult to obtain, at all levels of study (undergraduate 40%, master's 38%, PhD 40%). These trends are generally consistent with those reported last year, with increasing numbers of those interested in undergraduate study reporting difficulties in finding funding information (rising from 35% to 40%).

The increasing costs of higher education, particularly at undergraduate and master's level, and the huge variety in funding systems worldwide, makes this an extremely important category of information for students – and it seems many are struggling to find what they need.

A further problem area identified by the survey is information relating to application processes, with 25% of undergraduates and 21% of master's students flagging this as a concern. Here there is a notable increase at the undergraduate level, rising to 25% this year, from 12% in 2014.

These findings suggest scope for improvements to official university websites, where most respondents said they would seek this information. The importance of accuracy in reporting fees and the proprietary nature of information on scholarships and funding opportunities reduce the effectiveness of other information channels, placing a burden on universities to ensure this information is well reported.

Image 7: What types of information have you had difficulty finding when searching online?



SECTION 2: FOCUS ON SOCIAL MEDIA

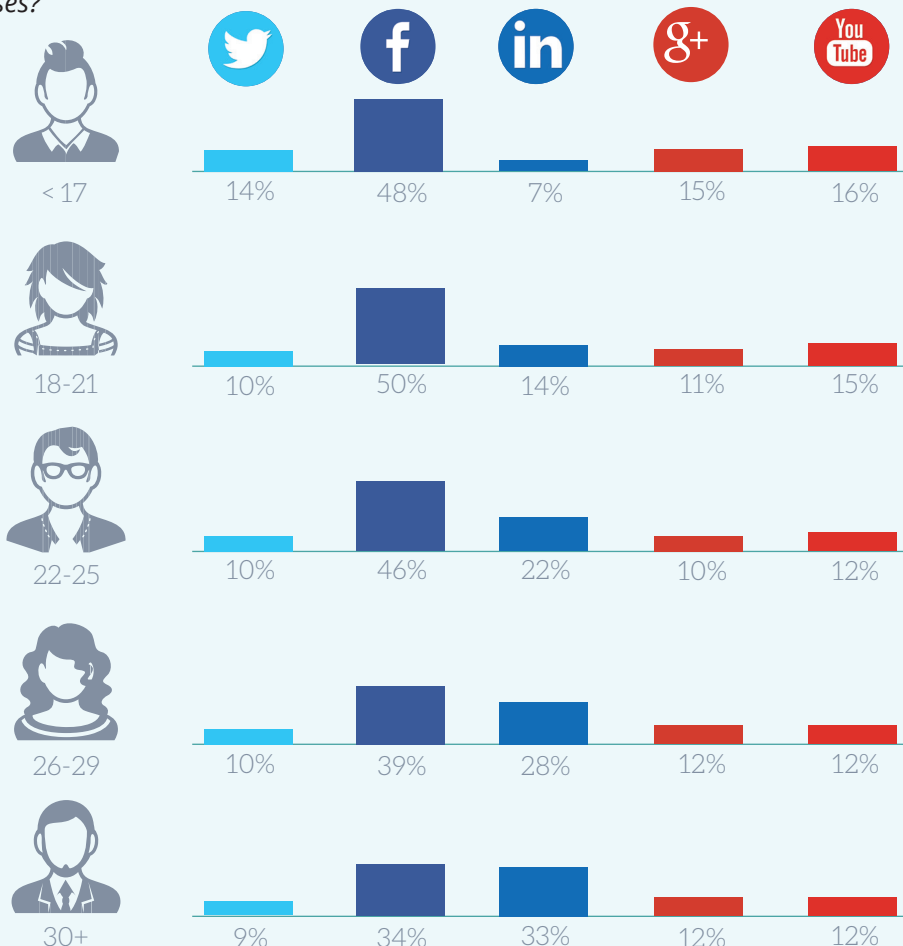
Most-used social networks

Respondents were asked which of five social networks they used to research universities: Twitter, Facebook, LinkedIn, YouTube and Google+. Among respondents who said they used at least one social network to research study options, Facebook was by far the most widely used (43%), followed by LinkedIn (19%), and YouTube (13%). Twitter and Google+ were each selected by 10% of respondents.

When broken down by age, these trends change significantly. As was reported in 2014, the youngest respondents, aged 17 and under, favor Facebook (48%) over LinkedIn (7%). Yet LinkedIn's use grows significantly among the older age groups; indeed those aged 30 and above are just as likely to use it as Facebook (33% to 34%). This is unsurprising, considering LinkedIn's focus on professional networking, but the findings clearly point to the importance of tailoring approaches to these different groups and maximizing presence on the most relevant networks. Twitter, Google+ and YouTube all remain more favored by younger respondents.

There is also differentiation depending on geographic location. LinkedIn is most widely used in the US and Canada (32%), but this falls to 15% in Asia. Similarly, YouTube is used by 17% of respondents in the US and Canada but only 11% in Africa. It is also worth noting that these trends will be largely influenced by the prevalence of other social networks, of various types, in specific regions and countries.

Image 8: Which of these social networks have you used to find information about universities and courses?



Importance of social media

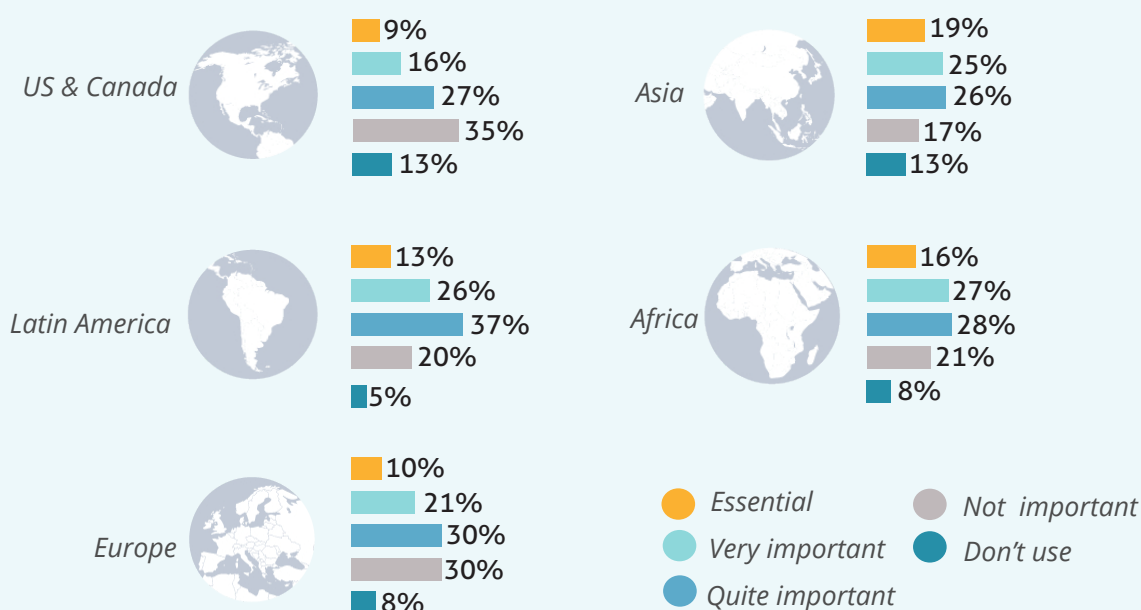
Trends in the use of social media as a tool for researching higher education options remain rather ambiguous. Some 10% of respondents say they regard social networks as essential in this context and 23% very important, while 10% claim not to use it at all and a further 25% indicate it is not an important resource. Comparing the total respondents who regard social media as essential or very important (“adopters”), with those who don’t use it or regard it as unimportant (“non-adopters”), reveals some interesting year-on-year trends. Adopters rose from 30.5% in 2014 to 36% this year, while non-adopters declined from 38% to 35%.

Perhaps surprisingly, these trends are generally consistent across the age groups, with 14% of respondents aged 17 and under rating social media as essential and 19% very important, exactly the same proportions as found among those aged 30 or over. However, it is interesting to note that the youngest group of respondents actually has the highest rate of non-adopters (40%) among any of the age groups.

There are, additionally, distinct differences between geographic regions. Only 25% of respondents in the US and Canada are adopters, compared to 44% in Asia and 43% in Africa. The US and Canada have the largest proportion of non-adopters (48%), and Latin America the lowest (25%).

As explored earlier, social media and student forums are predominantly valued as sources of inspiration and ideas; 39% and 37% of respondents, respectively, stated this as their main focus for using these two types of resource. The other main use of these channels is to compare institutions and programs (19% for social media and 24% for forums). This makes sense, suggesting students are using these resources to gain insights from peers, as a complement to official and less personal sources of information and comparison.

Image 9: How important is social media when researching universities and courses?



SECTION 3: MAKING CONTACT

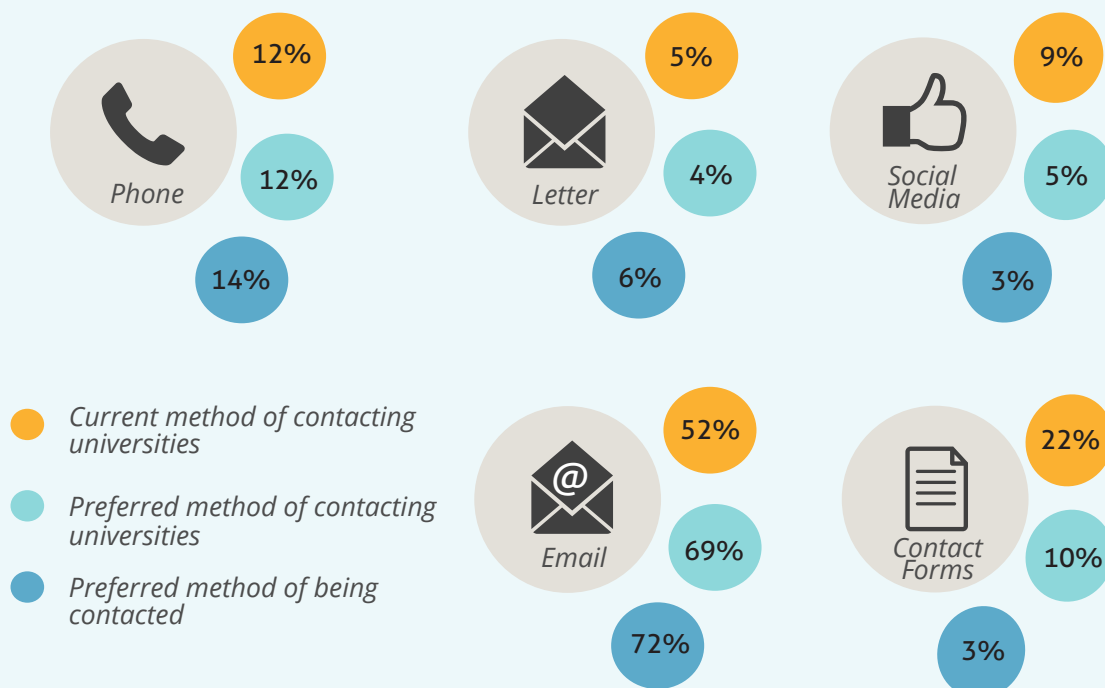
Current and preferred methods of communication

The survey asks respondents how they have contacted universities when seeking information. Of the five main channels (letter, email, phone, social media, online contact form), email is the most widely used (52%), followed by contact forms (22%) and then phone (12%). These trends are replicated across the age groups. There are some differences across geographic regions. For example, respondents in the US and Canada report using the phone more (21%) and social media significantly less than average (4%). Latin Americans conversely use the phone much less than average (7%), while using social media (12%) and contact forms more (27%).

When asked by which method they would prefer to contact universities, the vast majority chose email (69%), then phone (12%) and contact form (10%). This shows many respondents are using channels that they do not favor, in particular social media and contact forms. In terms of being contacted by universities, the trends are very similar, with respondents predominantly opting for email (72%) and phone (14%). These preferences are similar across the age groups and geographic regions.

As in 2014, these findings suggest that while a majority of prospective students ideally want to communicate with universities via email, difficulties in doing so – such as slow response times – are encouraging them to use alternatives such as social media. This may give universities some pause for thought when considering which channels to invest in, as increased use of social media is not necessarily a true reflection of applicants' preferences.

Image 9: Which of these methods have you used to contact a university? Which would be your ideal way of contacting universities? How would you prefer to be contacted by universities?



CONCLUSIONS AND IMPLICATIONS

Last year's report highlighted the importance of multi-channel communications and segmented campaigns, while cautioning against being too quick to make assumptions about the younger 'digital native' generation. The larger pool of data gathered in this second edition serves to re-emphasize these points, along with the following key takeaways:

There is clear scope for improvements to university websites. The survey suggests the types of information prospective students expect to find on official university websites are often also the most challenging to locate. This is particularly the case for scholarships and funding information, with application and admission requirements emerging as a second area of informational shortfall. This indicates clear scope for universities to improve the quality and depth of information provided on their sites, alongside efforts to optimize ease of access via site navigation and online searches.

High demand for more offline communications remains. While the survey reflects growing reliance on a wide spectrum of online channels for higher education research, it concurrently highlights continued demand for offline sources of information. The fact that this trend is particularly pronounced among younger applicants may be linked to the greater confidence which comes from speaking to a university representative in person, or sharing official printed materials with family members. It may also be the case that 'digital natives' are more likely to perceive online platforms as a given, therefore placing a higher value on alternative outlets.

Social media usage is growing, but the picture is complex. While a third of survey respondents now regard social media as essential or very important when researching universities, an equal number rate it as unimportant or irrelevant in this context. Again, the data collected serves to caution against making quick assumptions about younger applicants. On the other hand, intuitions about correlations between age and preferred social platforms largely hold true, and usage patterns by location are also distinct. This renders social media a particularly powerful tool for segmented campaigns, with the potential to effectively target prospective students of specific demographics.

Personalization and relevance remain essential. Finally, the accumulative insights from the past two years of surveys affirm the importance of ensuring communications meet the two overriding requirements of being personal and relevant. This means employing differentiated communication messages and channels for applicants of different profiles and at different stages in the process; ensuring all prospective students can access the information they want easily and with confidence; and continually responding to feedback from prospective students to ensure communications remain genuinely aligned to their needs and preferences.

This report was created for TopUniversities.com using data collected from attendees of the QS World Grad School Tour. An international community for students and academics, TopUniversities.com is the home of the QS World University Rankings®, and offers a wide range of resources to help prospective and current students make decisions about their future education and careers.

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