

STUDENTS ONLINE: GLOBAL TRENDS



HOW DO PROSPECTIVE STUDENTS USE DIGITAL RESOURCES
TO RESEARCH HIGHER EDUCATION?



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About the report

Within the space of a few decades, the internet has assumed an indispensable role in many parts of life – including decisions made about higher education. A 2012 US-based study from Google and Compete found that nine in ten enrolled students had used the internet to research higher education institutions, with one in ten exclusively using online sources of information.

A year earlier, the 2011 E-Expectations Report from Noel-Levitz published the alarming finding that one in five surveyed prospective students said they'd removed a college from their list as a result of a bad experience on the institution's website.¹ More recently, the ever-growing emphasis placed on universities' online presence has inspired a series of rankings of US colleges performing best on social media, launched earlier this year by CollegeAtlas.org.²

But while universities know the online sphere is essential when communicating with prospective students, there's little information available about how students use the internet during their research, and how they'd prefer to communicate with universities. This report aims to fill in some of these gaps, providing insights into how prospective students approach their online search, the types of online platform they value most, the tasks for which they're most likely to use different types of resource, and the information they find most challenging to access.

The global scope and broad age range of the survey sample also allows for some more specific insights into trends within each world region, as well as some – not always predictable – generational differences in applicants' use of and attitudes towards online resources. The results should be pertinent for anyone involved in student recruitment, particularly at the international level, as well as anyone with an interest in the ongoing evolution of digital technology and our relationships to it.

¹ 2011 E-Expectations Report: The Online Expectations of Prospective College Students and Their Parents, www.noellevitz.com

² Top Colleges in Social Media, published 28 May 2014, www.collegeatlas.org

Methodology & survey demographics

The survey was conducted via a paper-based questionnaire distributed to attendees of the QS World Grad School Tour in 2013 and 2014. A total of 2,215 responses were collected from 49 cities in 35 countries across Europe, Asia, North America, Latin America and Africa.

Broken down by world region, 53% of responses were from prospective students in Europe, 25% in Asia, 11% in Latin America, 8% in the US and Canada, and 4% in Africa. More females participated than males (55/45%).

As the events at which the survey was conducted were focused on those applying for postgraduate-level courses, the majority of respondents (73%) were interested in applying for master's programs, with 23% preparing for PhD study and 4% for undergraduate degrees. This is reflected in the age range covered: less than 2% of respondents were 17 or younger; 30% were aged 18-20; 43% were aged 22-25; 14% were aged 26-29; and 10% were 30 or older.

Key findings

Throughout the survey, globally applicable patterns are observable, though often accompanied by notable differences correlated to prospective students' location, age and (to a lesser extent) gender. Some of the most significant findings are summarized below:

- **Online resources are indispensable for most prospective students – but offline resources remain almost equally valued.**

Almost two-thirds of survey respondents said they considered online and offline resources equally important when researching higher education options, while just over 30% placed greater emphasis on the online world. Respondents in Africa were most likely to prioritize online resources, and men were more likely to choose this option than women. Perhaps surprisingly, the youngest respondents were least likely to prioritize online resources (see page 7).

- **Research about higher education is often conducted across multiple devices.**

More than half of respondents said they used at least two types of device to research universities and courses online. Across every region and age group, the most commonly used device was the laptop. Smartphone usage came next, and was most prevalent among younger respondents and those in Africa (page 9).

- **Different types of online resource are perceived within a clear hierarchy of importance.**

Respondents displayed substantial consistency when allocating levels of importance to different types of online resource, with a majority rating official university websites as “essential”, and university rankings websites most likely to be classed as “very important”. At the same time, most applicants placed at least some level of importance on a broad spectrum of online resources, including forums and social media (page 11).

- **Different online resources fulfill differentiated functions in prospective students' research, but there is significant overlap.**

The survey also revealed clear trends in the tasks with which applicants associate different types of online resource. Rankings websites, for example, were most commonly associated with comparing universities, while social media and forums were perceived mainly as sources of inspiration. However, there was significant cross-over, indicating that prospective students draw on a diverse portfolio of resources at each stage of their research (page 13).

- **Social media is widely used in prospective students' research, though considered a comparatively less important resource.**

While the majority of respondents said social media played at least some role in their higher education research, most perceived it as playing a less important role than other online resources. Overall, the most-used social networks were Facebook, LinkedIn and YouTube, but there was significant variation both at regional level and by age (page 15).

- **Despite making use of a diverse array of online resources, students still report difficulty finding information in several crucial fields – especially scholarships and funding.**

Almost 40% of respondents said they'd had difficulty finding information about scholarships and funding, while almost 20% identified student visas as a problem area. Information about course content was a particular priority for those in the US and Canada, while those in Latin America and Europe were most likely to express difficulty accessing information about applications and admission requirements. Priorities and challenges also varied depending on the level of course being applied for (page 20).

- **Email remains the most common and preferred means of contacting and being contacted by universities.**

While many universities are focusing on stepping up communications via social media, our respondents demonstrate that email remains the most popular method of contacting and being contacted by universities – though accompanied by a new pressure to speed up response times to match expectations set by platforms such as Twitter. Significant numbers of participants also favored phone calls and letters as methods of corresponding with universities, including the youngest respondents (page 22).



"Google is my best friend. I found the university where I'm doing my master's using Google. First I would Google 'top universities for a master's' or 'universities offering accredited courses in project management'. Then I'd go on the university websites, and then send emails directly to the university to ask questions."

Current master's student

SECTION 1: Most-used online resources and devices

Online versus offline resources

A large majority (almost two-thirds) of survey respondents said they considered online and offline resources equally important when researching their higher education options. Just over 30% classed online materials as more important, with less than 6% placing greater value on offline resources.

While this trend is fairly consistent across the regions covered by the survey, the major exception is Africa. Almost half (48%) of respondents in this region said they considered online resources more important, with an additional 47% valuing online and offline sources equally.

Female respondents were more likely to choose the “equally important” option (68% compared to 60% of men), while male respondents were more likely to prioritize online resources (34% compared to 27% of women). When comparing responses by age range, the trend is perhaps not in the intuitive direction; younger respondents – the ‘digital natives’ – were in fact less likely to prioritize online resources.

These findings suggest that while the internet has become an indispensable resource for most higher education applicants, this has not diminished demand for more traditional sources of information and advice. When asked to expand on their responses to this question, applicants highlighted the benefits of the more personalized guidance gained from speaking directly to university representatives, with many also saying they still valued printed prospectuses and advice from friends, family members and alumni.



“The people I spoke to, in person or by email, played the biggest role. That was more helpful than just relying on what a website says.”

Current PhD student

ONLINE VS OFFLINE RESOURCES

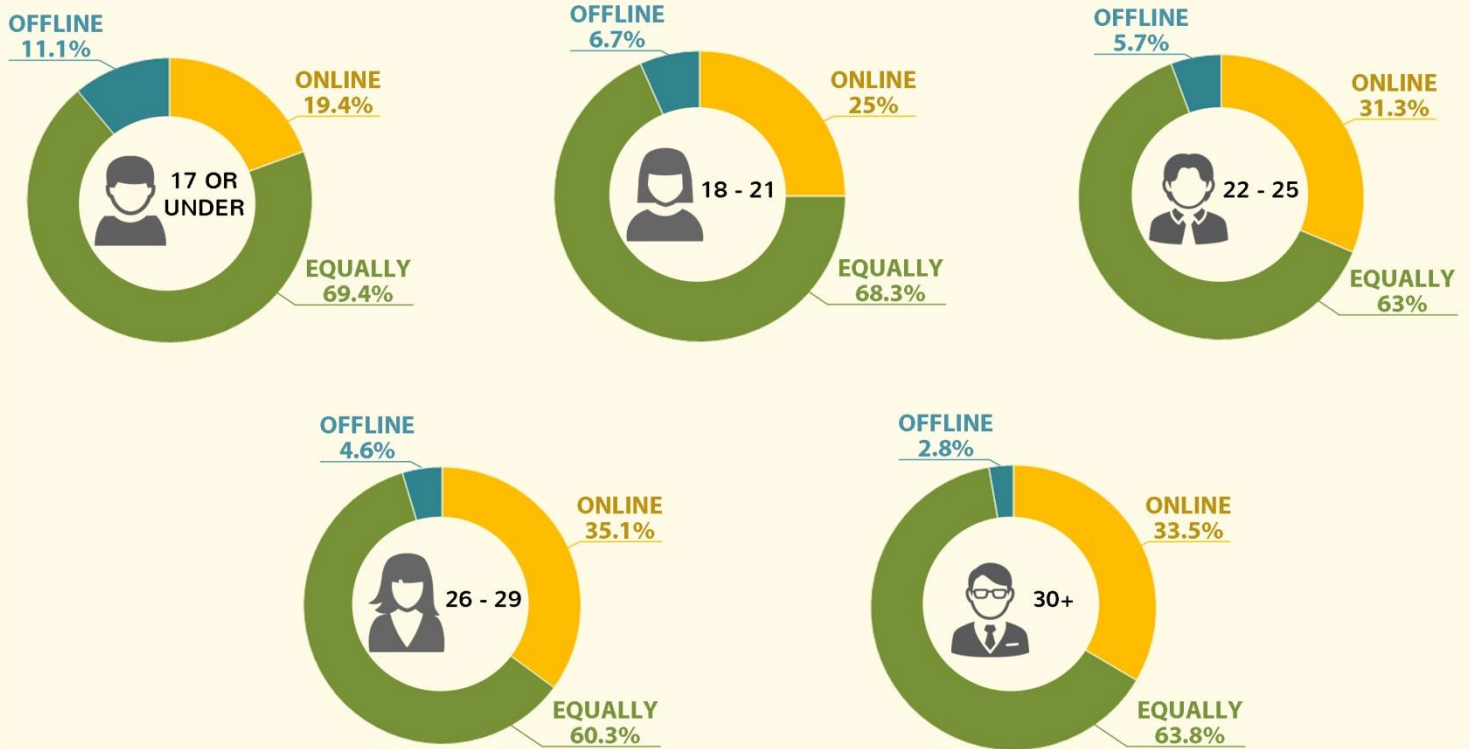


Image 1: Would you say online or offline resources are more important in helping you make decisions about your education?



“It’s really important to speak to people face to face. If it’s just online or a magazine, you may not get exactly the information you need. Face to face, you can ask as many questions as you want. For me, face to face is more important than online.”

Master’s applicant

Most-used devices

The survey asked participants which devices they used when researching universities and courses. The most-selected device by far was the laptop, which accounted for almost 47% of all selections; next came the smartphone (22%), followed by desktop (17%) and tablet (15%). This trend was fairly consistent worldwide. However, respondents in Africa were notably more likely to say they used smartphones (32%), and less likely to use tablets (8%).

This time the age trend follows a more intuitive pattern. Smartphone usage was most prevalent among the youngest group, declining with age, while older applicants were slightly more likely to be using tablets and desktop computers for their research.

Confirming what most universities already know and are striving to accommodate, the survey shows that the majority of prospective students conduct their research across multiple types of device. This provides further evidence for the importance of investing in responsive and adaptive web design, to ensure online platforms are optimized for all device types and screen sizes.



"I have generally accessed the internet to research study options via smartphone and laptop. That's only because I don't own a desktop or a tablet. However, I would choose a tablet or a laptop as I am not very fond of browsing the internet on a smartphone."

Current master's student



"I usually use my laptop to research university courses, but find it convenient to use my smartphone when out and about."

Current PhD student

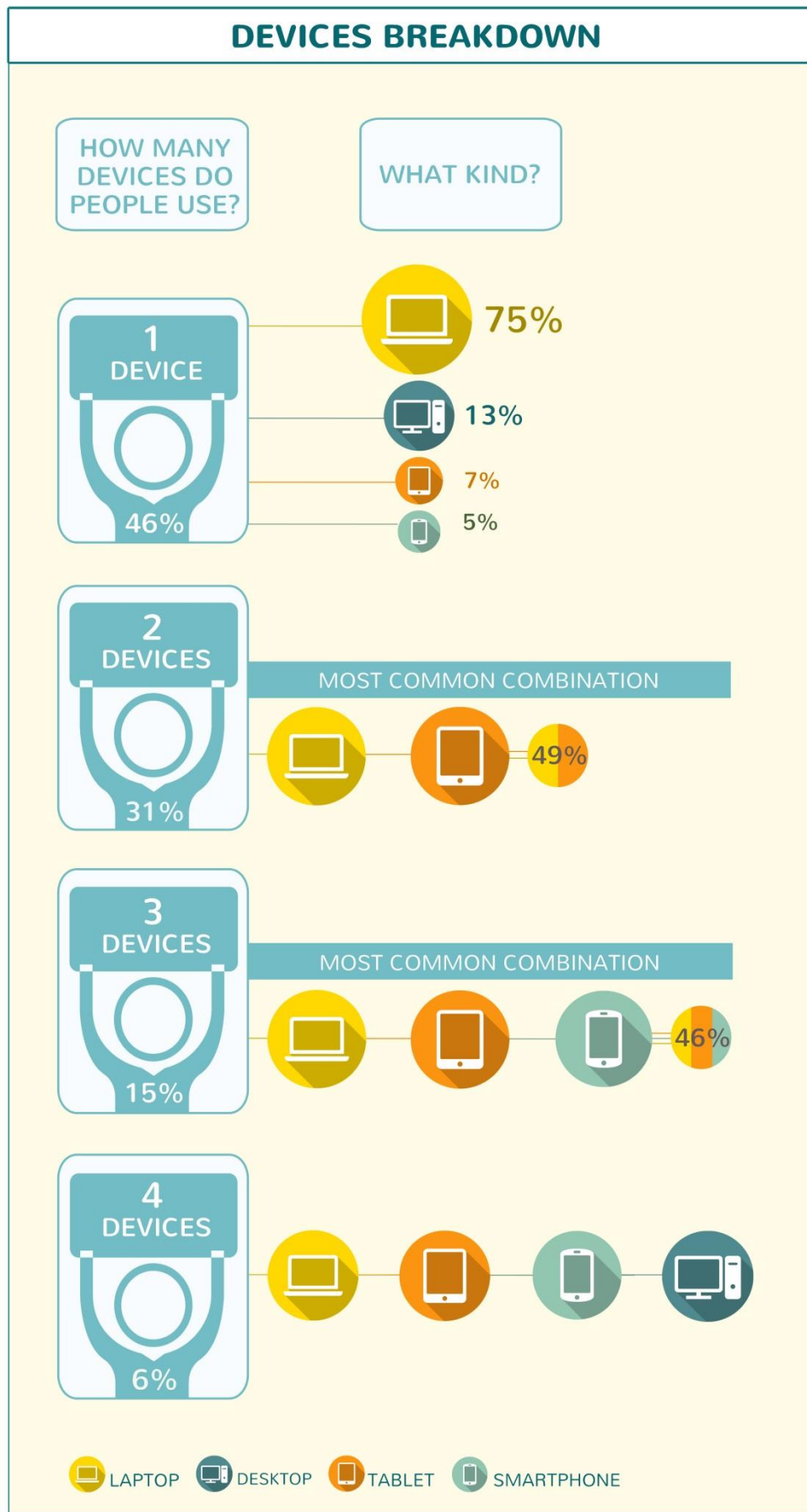


Image 2: Which devices do you use when researching universities and courses?

Importance of different online resources

Focusing on different types of online resource, a clear hierarchy of importance emerges. Two-thirds of respondents said they considered official university websites “essential” when researching higher education options, while university rankings websites were most likely to be classified as “very important”, and other websites about universities “quite important”. Although online forums and social media were generally considered less critical, they were still rated “essential”, “very important” or “quite important” by a majority of prospective students.

This indicates that today’s university applicants value a wide range of online resources when researching their options, with a majority placing at least some importance on all five of the different types of resource the survey asked about.

These trends are fairly consistent across age and gender, with some slight variation by region. For instance, respondents in the US and Canada were the most likely to classify official university websites as “essential”, and least likely to emphasize the importance of rankings sites. Meanwhile African respondents were the most likely to emphasize the importance of online forums, followed by respondents in Asia and Latin America.

It’s possible there’s a connection here with the fact that the majority of the world’s most prestigious universities and most popular study destinations remain clustered in Europe and North America. Prospective students outside of these regions may find it more difficult to access offline opportunities such as open days and information sessions, leading to a greater emphasis on the opportunities offered by the online world to fulfill the desire of receiving more personalized advice.

Regional differences in attitudes towards social media are explored in Section 2.

IMPORTANCE OF DIFFERENT ONLINE RESOURCES

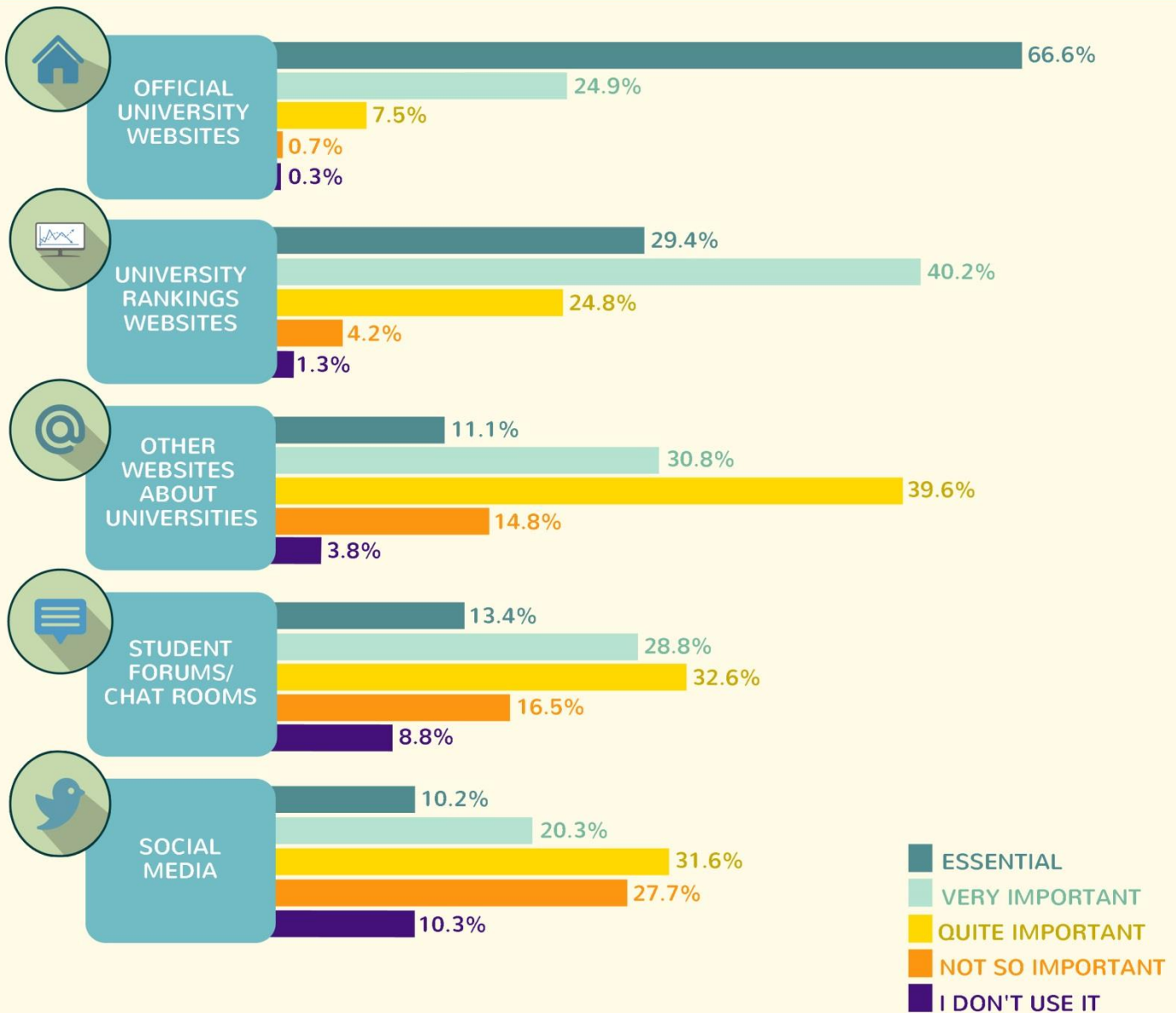


Image 3: How important are these online resources when researching universities and courses?

Usage of different online resources

As well as showing clear trends in the degree of importance placed on different resources, the survey also reveals well-distinguished usage patterns, which largely confirm intuitive assumptions. As would be predicted, respondents typically said they used official university websites to research courses, applications and funding, while rankings websites were the leading resource used to compare universities. Social media and online forums were most commonly associated with seeking ideas and inspiration, while information about locations was the field of research spread most widely across different platforms.

At the same time, the overall pattern is one of multi-resource use at every stage of the research process. Each type of resource is associated with multiple functions, and each field of research pursued across multiple platforms. It's clear that today's applicants are integrating many different information sources when assessing future higher education options.



"I mostly rely on feedback from friends and people I know. Online forums as well, but sometimes you find students promoting their own school, so you need to be careful. Rankings websites are useful too."

Undergraduate applicant



"The ideal way to get the information would be just one website that has everything, so you can compare in one place. It's quite difficult to navigate all the university websites individually."

PhD applicant

USAGE OF DIFFERENT ONLINE RESOURCES

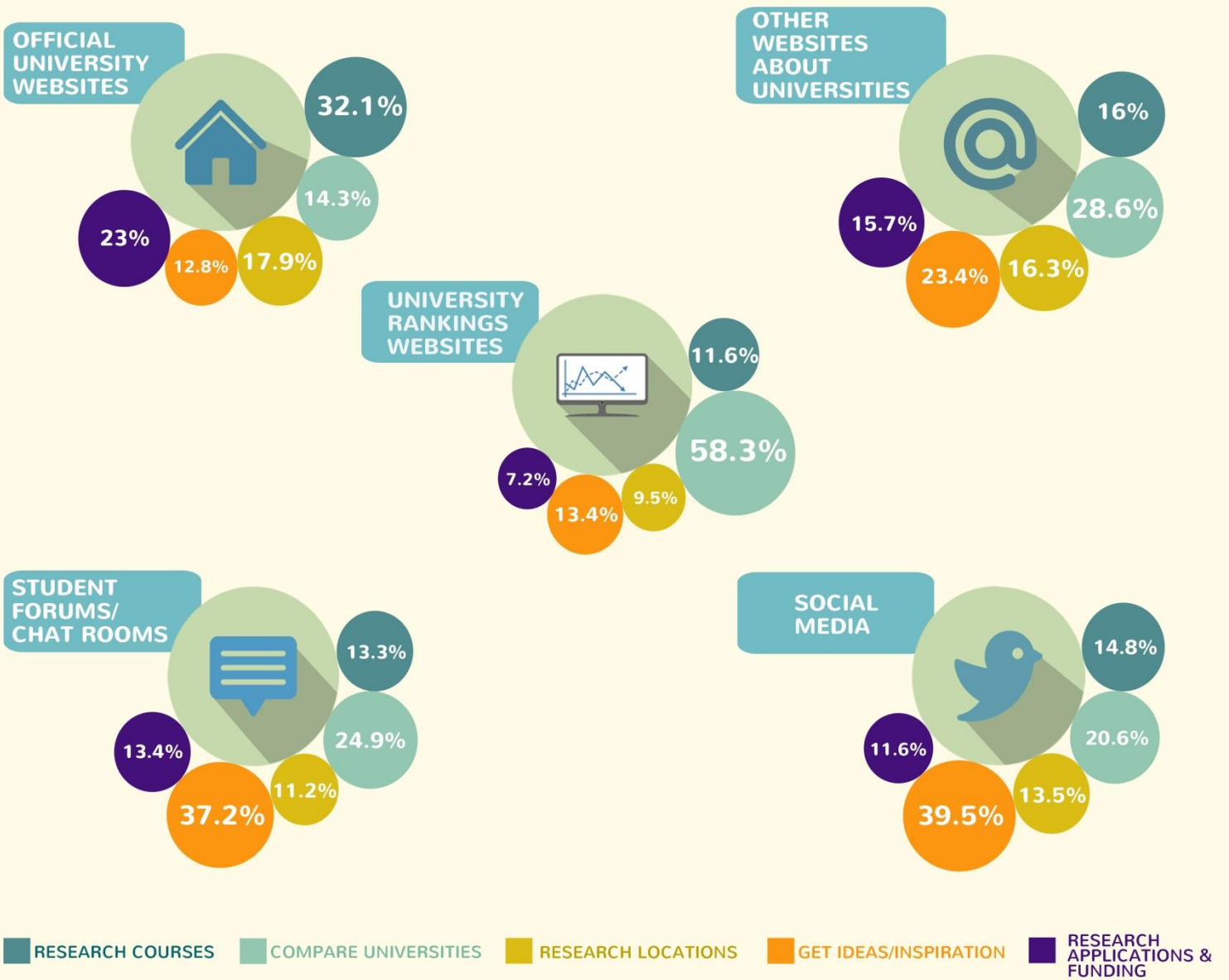


Image 4: What do you use each online resource for when researching universities and courses?

SECTION 2: Focus on social media

Most-used social networks

Survey respondents were asked which social networks they had used when researching universities and courses. Living up to its status as the “grandfather” of social media, Facebook claimed the most responses across all world regions and age groups. The next most popular choice was LinkedIn – a promising result for the network’s new University pages, launched less than a year ago.

The survey results also suggest that universities’ perseverance in adding content to their YouTube channels is not in vain. In every region except Africa, YouTube was the third most-used social media platform for researching universities, after Facebook and LinkedIn.

Facebook was even more dominant in Africa than in other regions, while LinkedIn found its greatest popularity in the US and Canada, and Twitter’s biggest response rate was from Latin Americans. Asian respondents were the most likely to select “other”, reflecting the continued success of the region’s own popular social networks, such as Renren, Youku and Mixi.

Considering differences by age group, the trends are clear and reasonably intuitive; LinkedIn usage grows with age, while Twitter, Facebook and YouTube are all most popular among the youngest groups.



“Social media could be a good start for getting in touch with the university. Still, you need to trust the official status of it.”

Undergraduate applicant

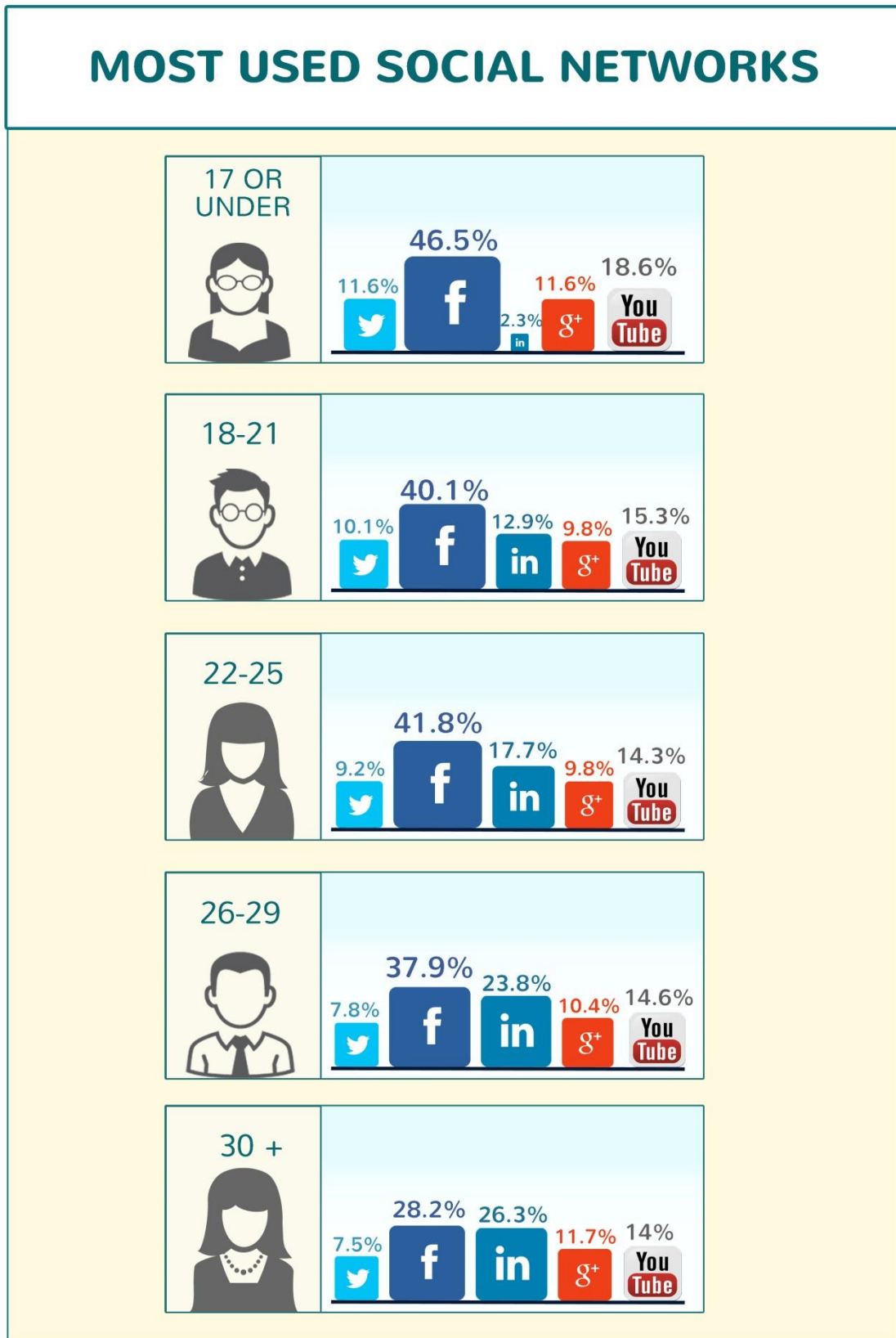


Image 5: Which of these social networks have you used to find information about universities and courses?

Importance of social media

A majority of respondents across every age group and world region said they used social media to at least some extent during their higher education research. The picture by age group is relatively consistent here, with variation more observable at regional level. Respondents in Latin America and Africa were most likely to class social media as an “essential” part of their research, while those in the US and Canada were most likely to say they didn’t use it at all for this purpose, followed by those in Europe.

In general, however, respondents were most likely to place social media somewhere in between. Across Africa, Asia and Europe, the most-selected category was “quite important”. The top choice for respondents in the US and Canada was “not so important”, while those in Latin America were at the other end of the spectrum, with a majority classing social media as “very important”. This correlates with the latter group’s tendency to place greater importance on online resources overall, when asked to evaluate online against offline.

In the context of higher education research, respondents most commonly perceived social media as a way to “get ideas and inspiration”, and this was fairly consistent across all age groups and regions. In most world regions, the second most common usage was to compare universities, with the key exception of Latin America, where respondents selected information about courses as the second most important function for social media.



“I don’t use social media to research universities. I feel it’s a form of marketing. If you want proper information, you go to the website and contact the relevant person.”

PhD applicant

Importance of Social Media

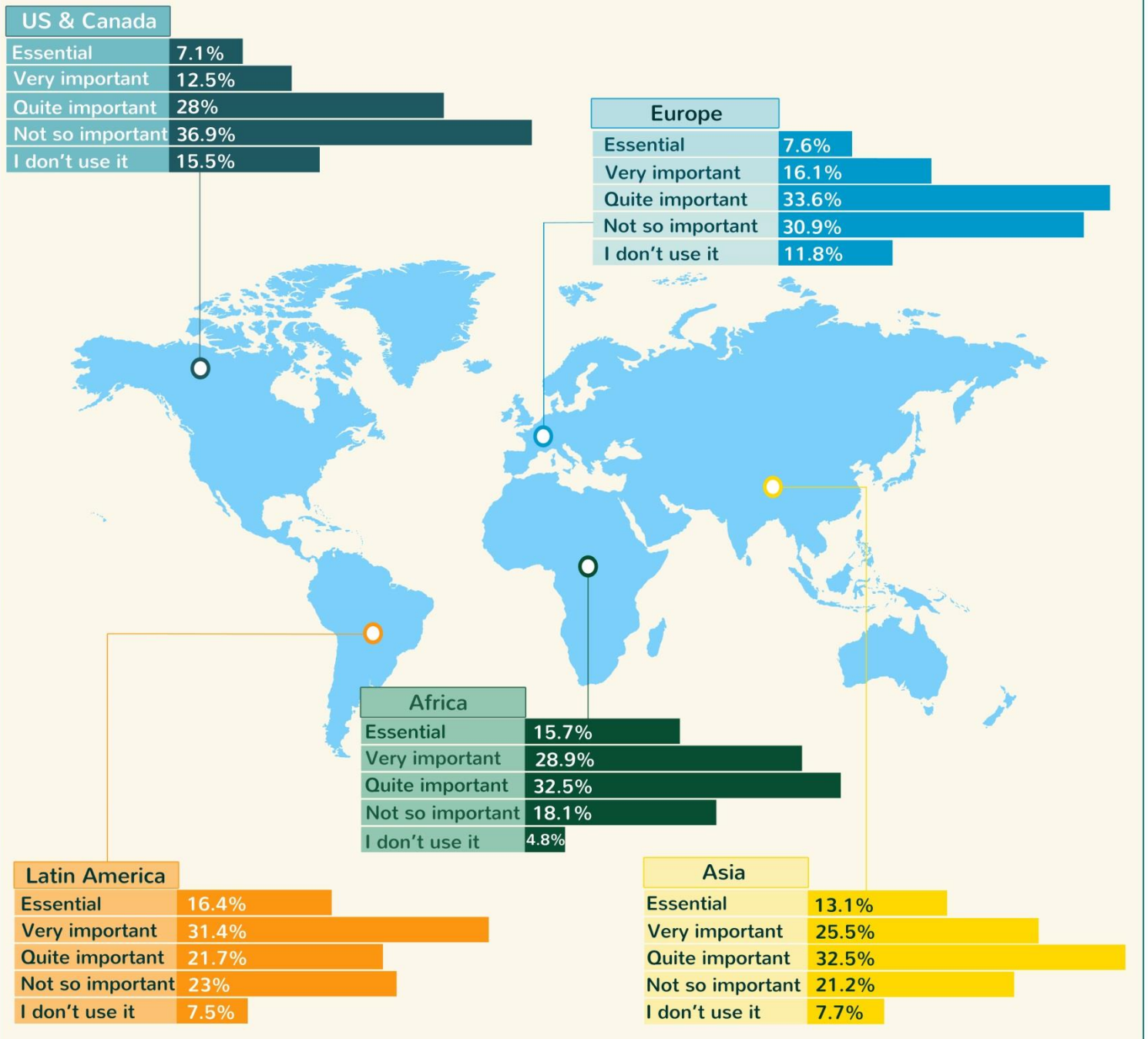


Image 6: How important is social media when researching universities and courses?

SECTION 3: What are students searching for?

Most searched-for and hardest-to-find information

When asked to prioritize the elements they were most likely to enter into an online search during higher education research, 45% of respondents chose searches connected to their subject of study; 28% searches about the course type; 24% location-related and 3% other.

Across every age group and every region, respondents said the hardest information to find online was about scholarships and funding – and especially those in Africa. For those in Latin America, Africa and Asia, the next biggest challenge was information about student visas, while for respondents in Europe the second-toughest area was information about applications and admissions, and for those in the US and Canada, information about course content.

Considering respondents by level of course being applied for, scholarships and funding remain the biggest challenge for all groups – but particularly among those applying for PhD programs. Those applying for undergraduate studies were most likely to report difficulty finding information about study locations, with this representing a larger challenge for them than information about course content or applications.



“The most important information is the content of the program, and the requirements. I come from another country, so I need to know if my degree is accepted.”

Master’s applicant

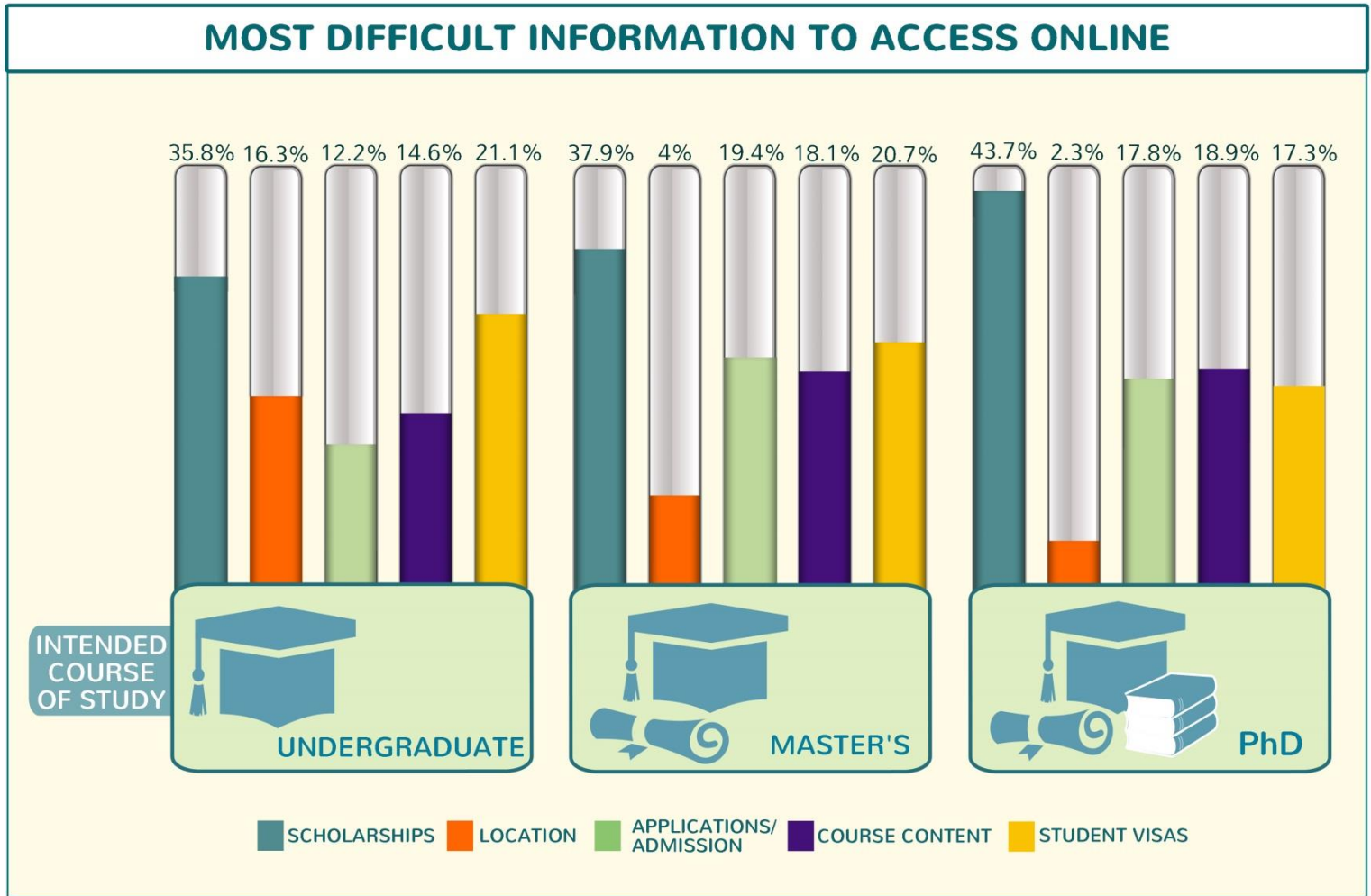


Image 7: Which of these have you had difficulty finding information about when searching online?



“The most important information is about fees and how to pay for it. Also the structure of the course, and the content.”

PhD applicant

SECTION 4: Making contact**Current and preferred methods of contacting and being contacted by universities**

The survey asked prospective students how they had previously contacted universities, how they would prefer to contact universities, and how they would prefer to be contacted in turn. Here, the findings reveal a difference between current practice and what applicants would ideally like to happen. Most notably, while online contact forms and social media are both currently used by significant percentages of prospective students to contact universities, far fewer identify these as their preferred methods.

The relative unpopularity of social media here may come as a surprise, especially as many universities are investing heavily in developing their social media channels, in some cases even viewing this as a replacement for older forms of communication, such as email. However, as one UK-based student recently felt compelled to explain, Twitter may be increasingly used by students for “quick queries”, but often only because universities don’t respond to emails quickly enough.³

Email was indeed the most popular choice for our respondents, both as a method of contacting universities and being contacted in return; this was the clear top preference across every region and age group. Those in Latin America were the most likely to choose social media, consistent with their tendency to place greater importance on social media overall, while respondents in Africa were the biggest fans of the generally less popular website contact forms. Those in the US and Canada were most likely to want to pick up the phone when making contact, and most likely to desire a letter when being contacted.

Considering responses by age, the youngest respondents were most likely to have contacted a university via social media, and most likely to choose this as their preferred way of approaching universities. However, they were least likely to select social media as their ideal way of being contacted by institutions, and the leading advocates of both letters and phone calls. This perhaps reflects the often conflicted relationship with social media held by the ‘digital native’ generation; no other group is quite so finely attuned either to the opportunities social media offers, or the blurred lines and tensions presented by its ever-expanding reach.

For universities, the messages here are clear: email remains the preferred method of communication, but response times need to be improved to keep pace with the new expectations and immediacy offered by social media. Website contact forms are for the

3 Eleanor Doughty, “The social media standoff, student style”, www.Telegraph.co.uk, 4 June 2014

most part used reluctantly, while there remains demand for more traditional and offline forms of communication, including phone calls and letters.

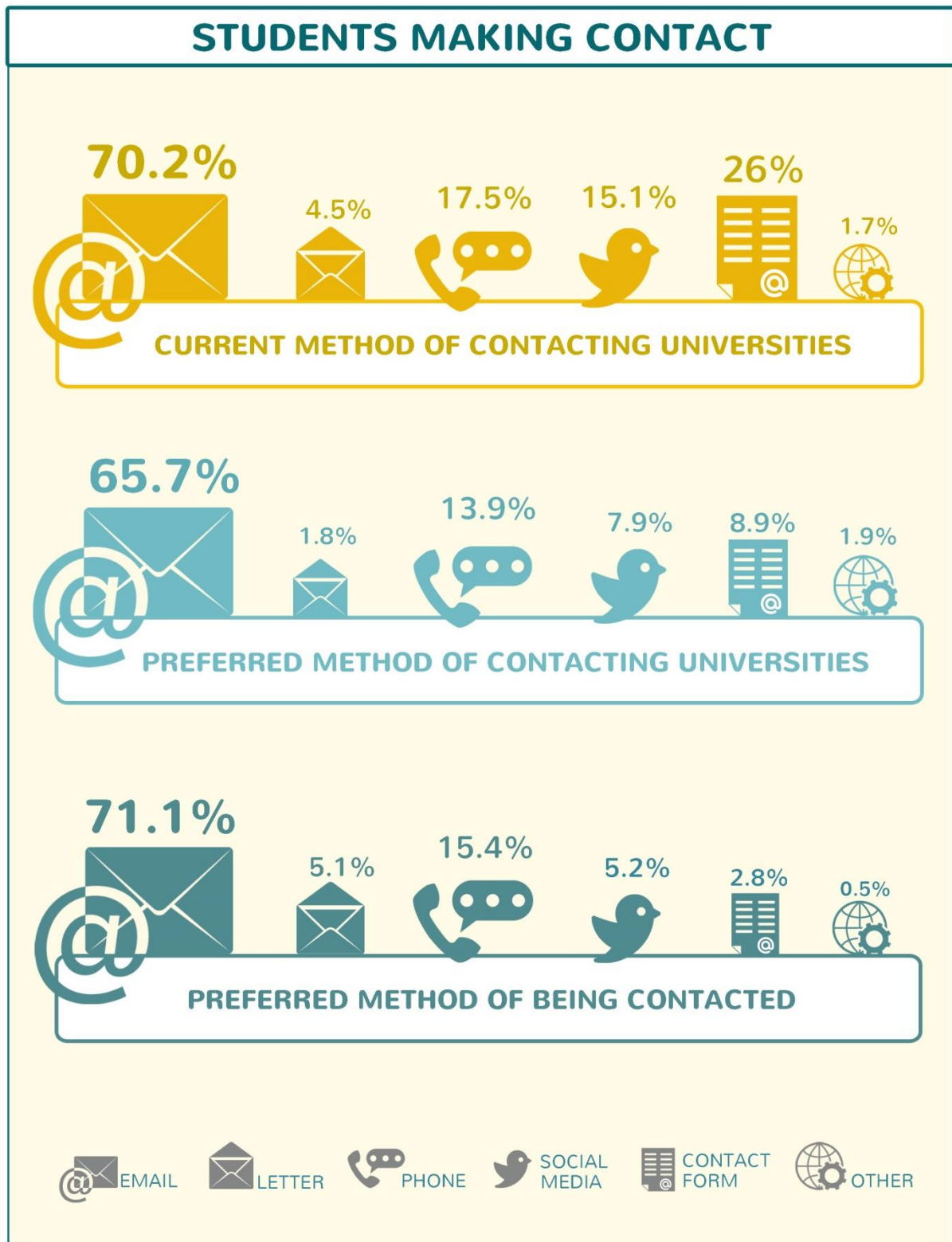


Image 8: Which of these methods have you used to contact a university? Which would be your ideal way of contacting universities? How would you prefer to be contacted by universities?

Conclusions and implications

One of the aims of this report is to provide insights of practical relevance and value for universities striving to improve their communications with prospective students. In this context, the following messages stand out among the strongest for higher education institutions – as well as providing a window into the continued evolution of the role played by the online sphere in all kinds of communications, information-seeking and -sharing, and major decision-making.

- **The findings here should provide further stimulus for universities already engaged in expanding and optimizing their online presence.**

The survey findings confirm that prospective students draw on a wide range of online resources at each stage of their higher education research, using multiple types of device. While it's essential to have a user-friendly, adaptive and engaging official website, universities also need to consider that prospective students are almost certain to be complementing the official information provided with additional research conducted using rankings sites, other websites about universities, online forums and social media.

- **While no higher education institution can afford to fall behind in the online world, offline communication channels should not be neglected.**

The majority of respondents rated online and offline resources as equally important components of their research, and many also expressed a preference for phone calls or even letters when communicating with universities. This continuing demand for offline channels was clear even among the youngest survey respondents, with interviewees highlighting the importance of opportunities to speak to university representatives directly, whether in person, by phone or using instant messaging services such as Skype.

- **Universities (and other types of organization) should not be too quick to make assumptions about the younger ‘digital native’ generation.**

The trends by age group revealed by the survey are sometimes surprising, suggesting that universities may benefit from spending more time considering what applicants really want before they make drastic changes to their communication strategies. For example, an increase in queries received via social media may reflect frustration over slow response times to emails or phone calls, rather than a real preference for communicating with institutions using social networks.

- **While global trends are observable, universities may also benefit from considering specific patterns and preferences in online usage among their target audience.**

Universities recruiting internationally may also benefit from a more targeted understanding of how different segments of their audience use and perceive online resources. For example, survey responses suggest prospective students in the US and Canada are more likely to be using LinkedIn to research universities, while those in Africa, Asia and Latin America place a higher value on online forums than North Americans or Europeans.

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. This includes course and country guides, exclusive reports and publications, an international blogging community and online discussion forums.

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