

2012 E-Expectations Report

The Online Expectations of College-Bound Juniors and Seniors

A look at their behavior and expectations regarding college Web sites, e-communications, social media, and more

Noel-Levitz, OmniUpdate, CollegeWeekLive, and NRCCUA® (National Research Center for College & University Admissions) conducted a survey of 2,000 college-bound juniors and seniors about their expectations for college Web sites, mobile usage, e-mail, and social media.

Among the findings:

- More than 50 percent of students said the Web played a significant role in their decision to apply to a school.
- Three out of four emphasized simplicity in navigation and written content over “cool” navigation and visual design.
- Cited by 55 percent of respondents, difficulty with site navigation was among the greatest challenges encountered with college Web sites and was the top response by a large margin.
- Only 23 percent have used a net price calculator on campus Web sites; 74 percent who did not said they could not find one.
- Among students with mobile devices, 52 percent said they had viewed college Web sites on them; 20 percent did so via a tablet device.
- Sixty-nine percent of prospective students would participate in live chats with current students or faculty; 75 percent would communicate with college representatives via Webcam.
- Regarding e-mail, 97 percent said they would open e-mail from a school on their list, and 68 percent would do so from schools they did not know.
- Sixty percent said they are open to receiving text messages from college representatives.
- Forty-six percent have visited a college’s Facebook page; 69 percent of those “liked” a college’s page.

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Who participated?

These results came from a phone survey of 2,000 college-bound high school juniors and seniors.

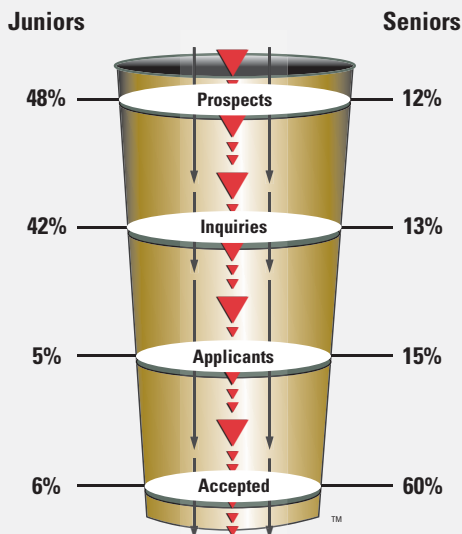
- 49% — Juniors
- 51% — Seniors

- 54% — Female
- 46% — Male

- 41% — Caucasian
- 15% — Hispanic
- 14% — African American
- 5% — Asian
- 1% — American Indian
- 15% — Other
- 9% — No response

- 38% — A average
- 50% — B average
- 11% — C (1% below C)

- 25% — Midwest
- 16% — Northeast
- 38% — South
- 21% — West



Where are they in the enrollment process?

In many instances, juniors and seniors had similar responses to the questions. Some of the more significant differences are pointed out throughout the report. Other differences among various student subpopulations are also noted.

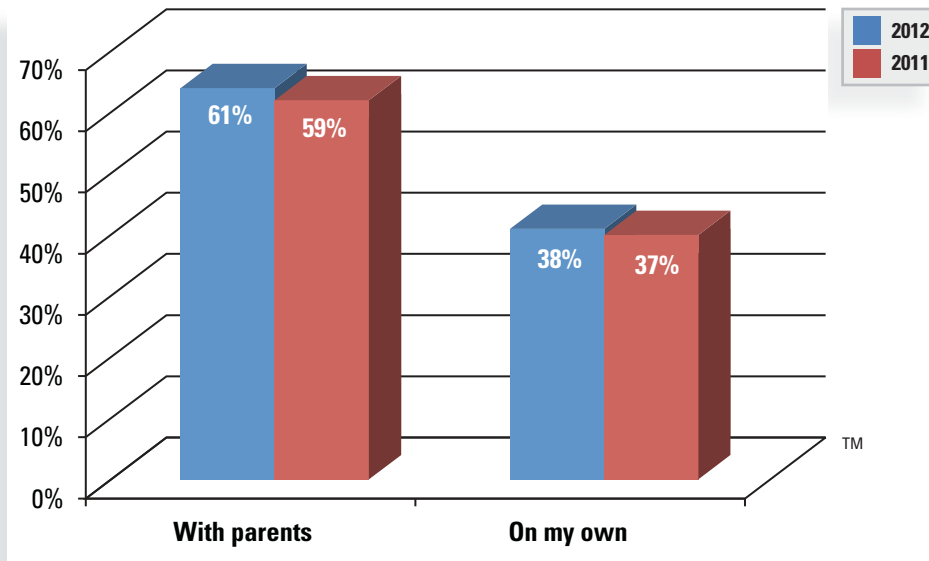
E-Opportunities: How can campuses meet students' e-expectations?

Throughout this report, we will compare students' expectations with campus practices from the 2012 *E-Recruiting Practices and Trends at Four-Year and Two-Year Institutions* report. These callouts will also highlight opportunities for campuses to better connect with students. The full report is available at www.noellevitz.com/e-recruitment2012

Researching campuses

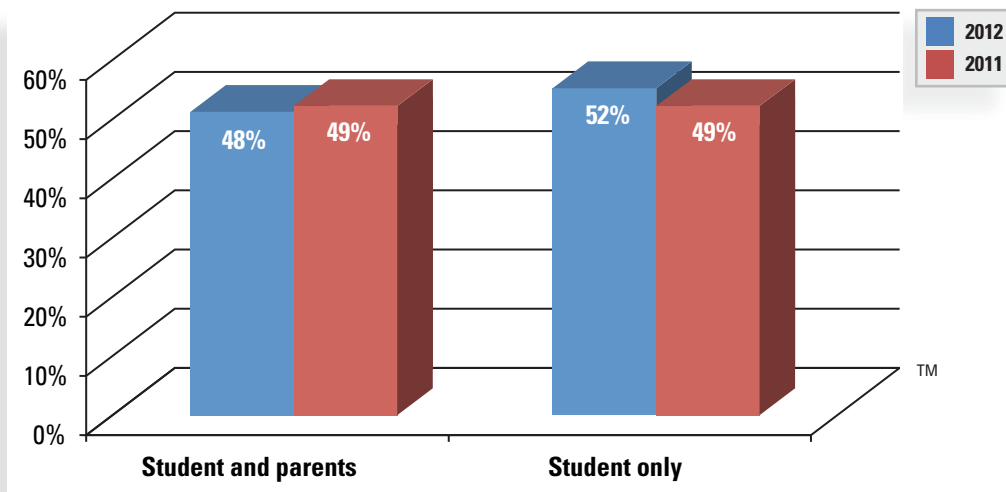
As they did in the 2011 E-Expectations study, the majority of students reported that they were researching colleges with their parents or guardians.

How are students conducting their research?



Note that only 1 percent of the 2012 respondents said their parents were doing all the research, compared to 4 percent who said that in the 2011 survey.

Who makes the final enrollment decision?



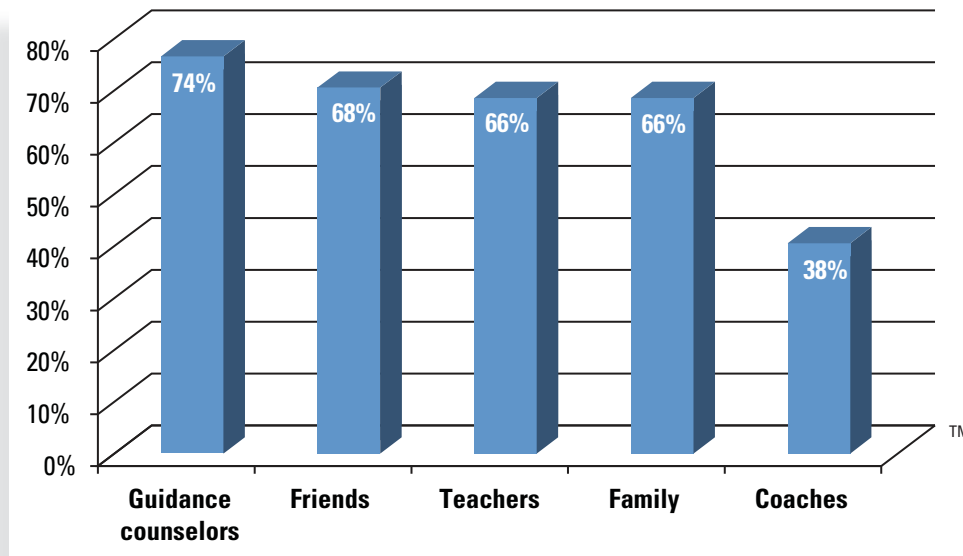
In 2012, less than 1 percent said their parents alone were making the enrollment decision, while 2 percent had that reply in 2011.

E-Opportunity: Collect e-mail from parents and guardians

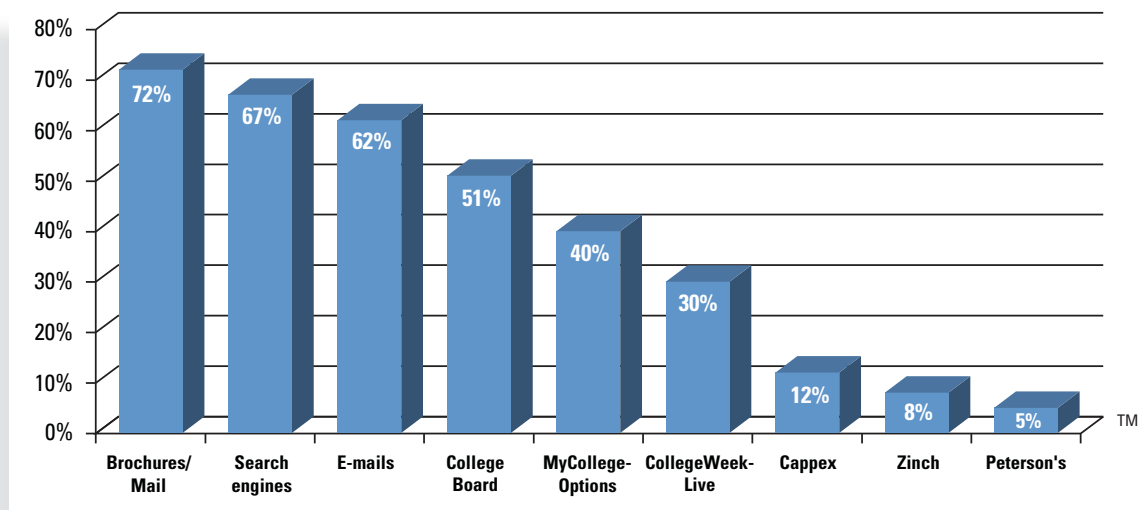
With more than 60 percent of students saying their parents were involved with researching colleges, campuses should collect e-mail addresses from parents and include them in communication flows. According to the *2012 E-Recruiting Practices* study, 70 percent of four-year private campuses, 47 percent of four-year publics, and 14 percent of two-year campuses currently collect parental e-mail addresses.

In researching campuses, students turn to a variety of online, print, and human resources to build a list of schools.

Who do students rely on for help with college searches?



What resources do students use for researching colleges?

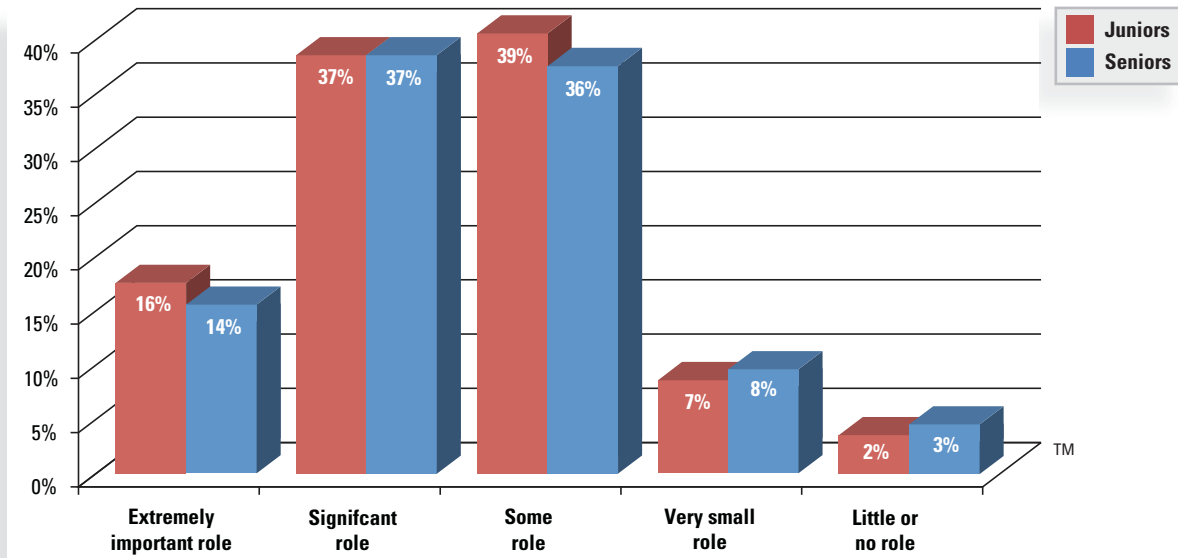


E-Opportunity: Maximize search engine relevance with updated content on key Web pages

As the previous chart shows, search engines rank highly with students, which is why it is important for campuses to make sure their pages are updated regularly. Fresh content is one of the major factors in search engine optimization (SEO). Updating content on key pages is the simplest way to ensure search engine bots return frequently and sends positive signals to human visitors that important information is current.

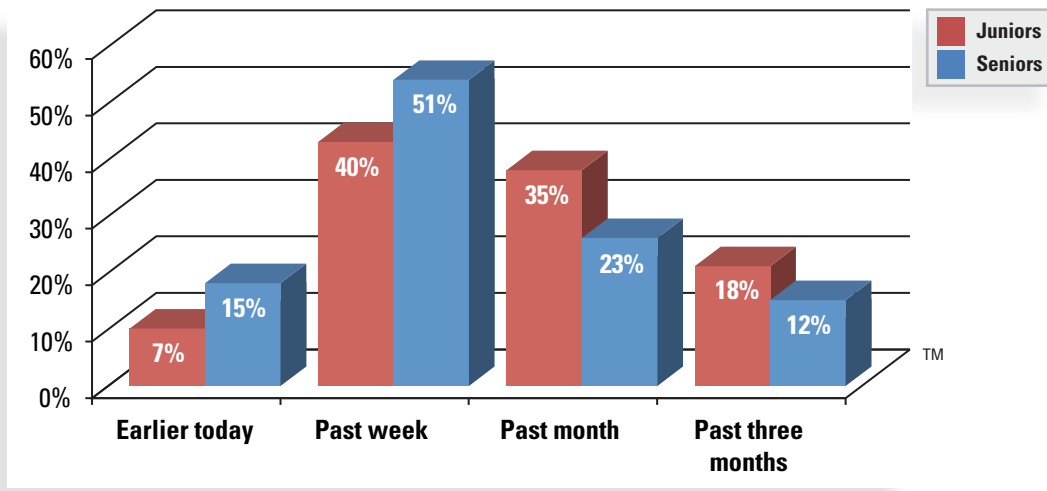
In addition, 42 percent of four-year privates, 34 percent of four-year publics, and 21 percent of two-year colleges report investing in an SEO process to improve search results.

How important is the Web in the evaluation of an institution?



Collectively, 52 percent of students responded that a campus Web site played at least a significant role in their evaluation of a potential college.

How frequently do students look at college Web sites?

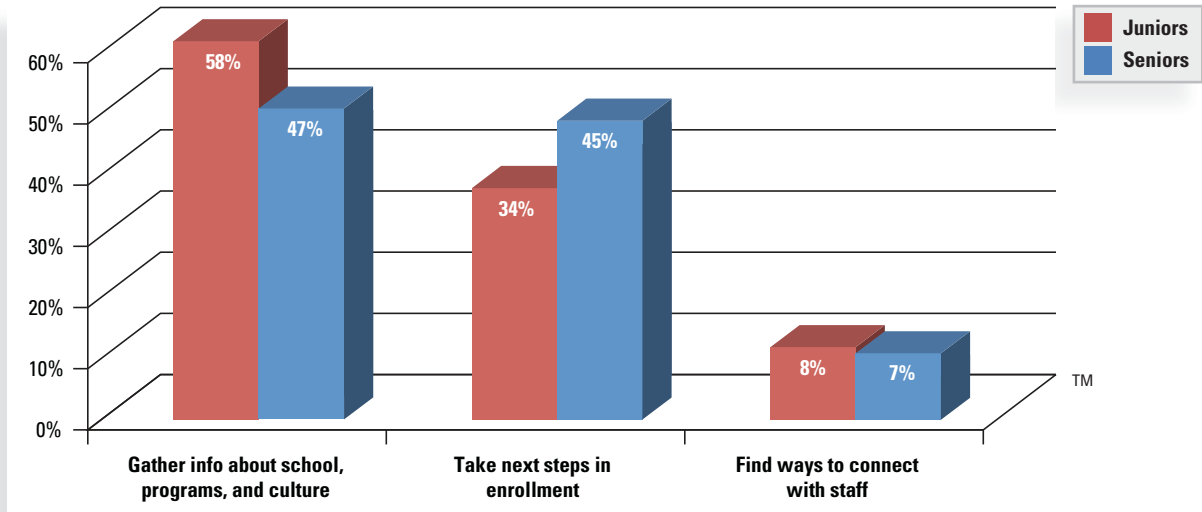


These results show two-thirds of seniors and nearly half of juniors checked campus Web sites every week. This finding illustrates not just the importance of using the Web as an initial recruitment tool, but as a means to keep moving admitted students toward enrollment (given that most of the seniors in this study had been accepted).

Web site content

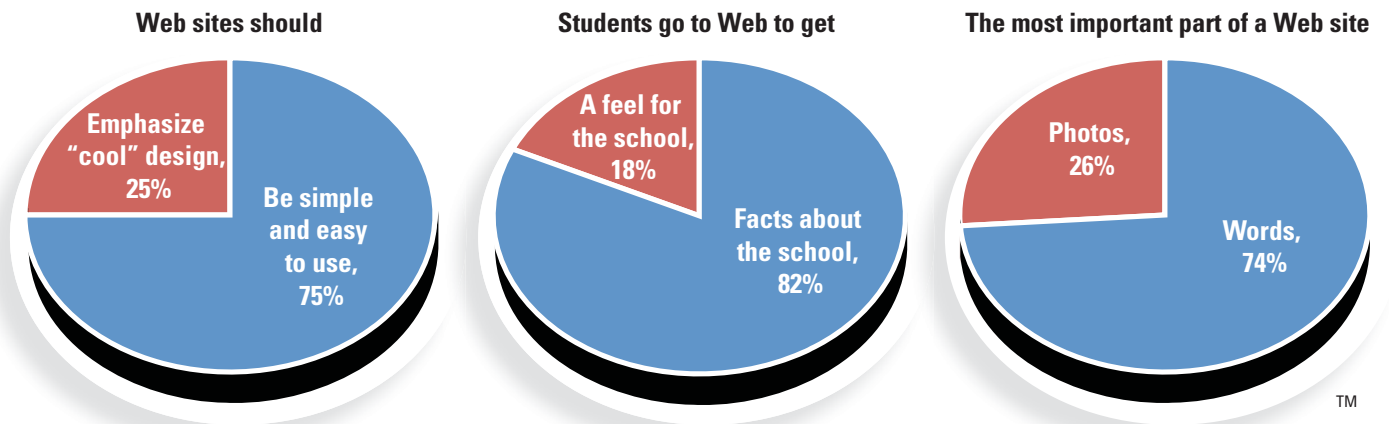
When students arrive at a college Web site, what do they expect? What do they want to accomplish? What sort of Web experience do they prefer? The respondents provided answers for a wide range of questions about visiting college Web sites.

What are their top goals when visiting a campus Web site?



These results show differences in behavior based on a student's stage in the enrollment funnel. Juniors were more likely to use the Web to research a school, while seniors were more likely to use the Web to take action toward enrolling. Again, this illustrates that a campus Web site must serve students at all stages of the enrollment process and not focus primarily on prospects and inquiries.

What are their general attitudes toward Web design and content?



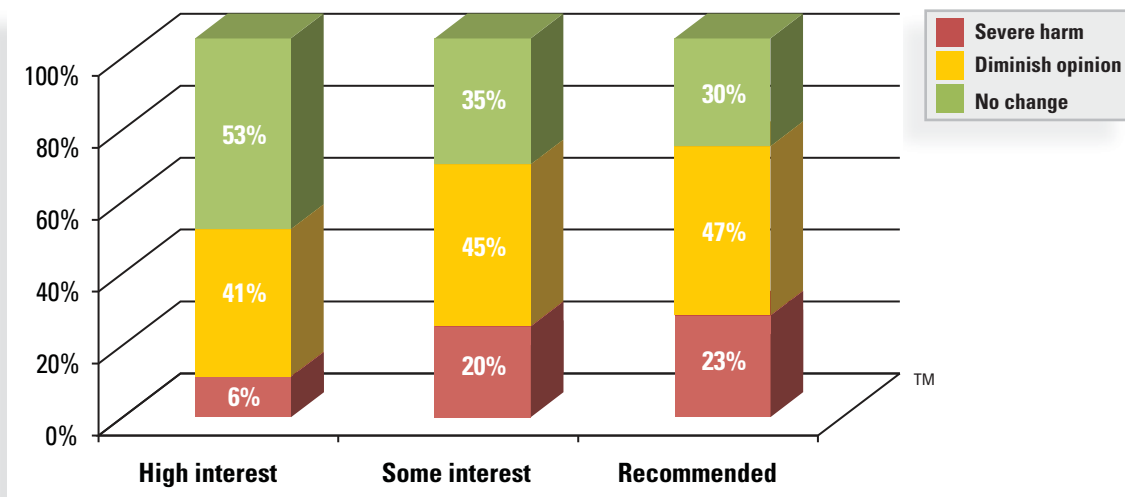
Students overwhelmingly emphasized ease of navigation and the value of content over design and visual elements. This does not imply that they do not value those design and visuals, but that those elements need to *support* the Web experience, not be the focus of that experience.

When asked what their greatest challenges were with campus Web sites, site navigation was by far the biggest issue:

- **55 percent couldn't find what they wanted because of challenges with the site navigation**
- 18 percent were put off by the look and feel of the site or the content quality
- 12 percent couldn't find academic content
- 8 percent couldn't find cost, financial aid, or scholarship details

What happens when students run into navigational issues? How much damage does it do to their evaluation of a campus? The answer depends on the initial interest the student had before visiting the site. The more interested students were in a campus *before* visiting its Web site, the more forgiving they were if they ran into navigational problems. They were more negative if they only had some interest in an institution, and harshest if looking at the site of a campus recommended by someone.

If students struggle to find information on programs, admissions, and cost, how does it affect their opinions of institutions in which they are highly interested, somewhat interested, or were recommended by others?



This has particular importance regarding the use of search engines for researching colleges. While the survey did not ask how a bad experience would affect students' perceptions of a site they visited through a search engine, these results suggest it would diminish or severely harm the opinions of the majority of students.

When asked about content priorities, students ranked what content they looked for first, what content they valued the most, and what content they sought on a mobile device.

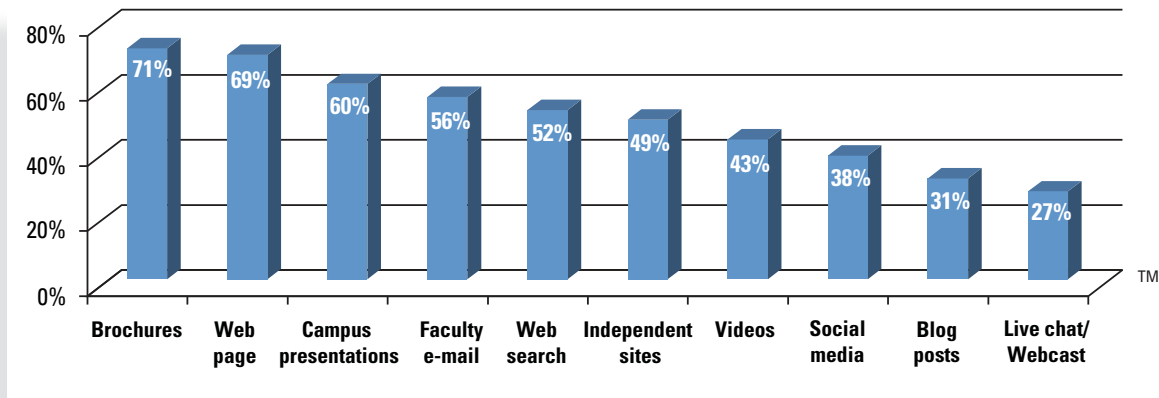
What are students' content priorities?

Web content	First priority	Most important	Mobile
Academics	55%	47%	23%
Cost/Aid	23%	29%	17%
Admissions process	11%	11%	11%
Campus visit	5%	3%	3%
Campus life	3%	5%	4%
Athletics	3%	3%	3%

When asked how they take action after looking at content on a Web site, more than 20 percent of students said they looked for an inquiry form, which was the top response.

The chart on page 4 shows the resources that students use to learn about a campus, but what resources do they use to learn more about their top content priorities?

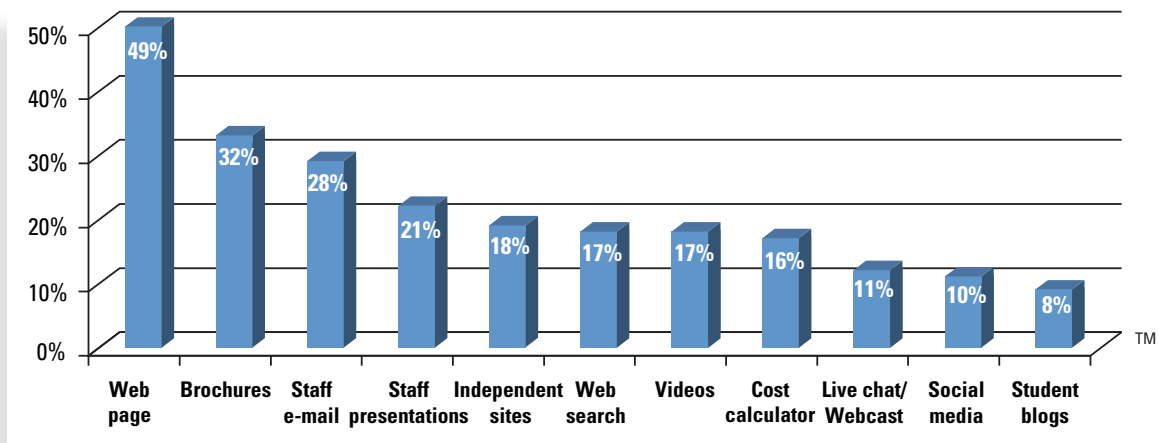
What are the best ways to learn about an institution's academic programs?



In a related question, students also stated how they preferred to find information about academic programs on a college Web site.

- Browse through an alphabetical list (41 percent)
- Use a site search engine (33 percent)
- Look through college or departmental Web pages for all programs within that area (26 percent)

What are the best ways to learn about cost and financial aid?



Starting in fall 2011, the federal government required campuses to post net price calculators on their Web sites as a way to help students learn about the cost of attending college. Yet despite this mandate, fewer students reported using these cost calculators in 2012 than the previous year. The most cited reason? Students could not find the calculators on campus Web sites.

Net price calculator usage	2012	2011
Have used a net price calculator	23%	36%
Have not used one because they could not find it on campus Web site	74%	50%

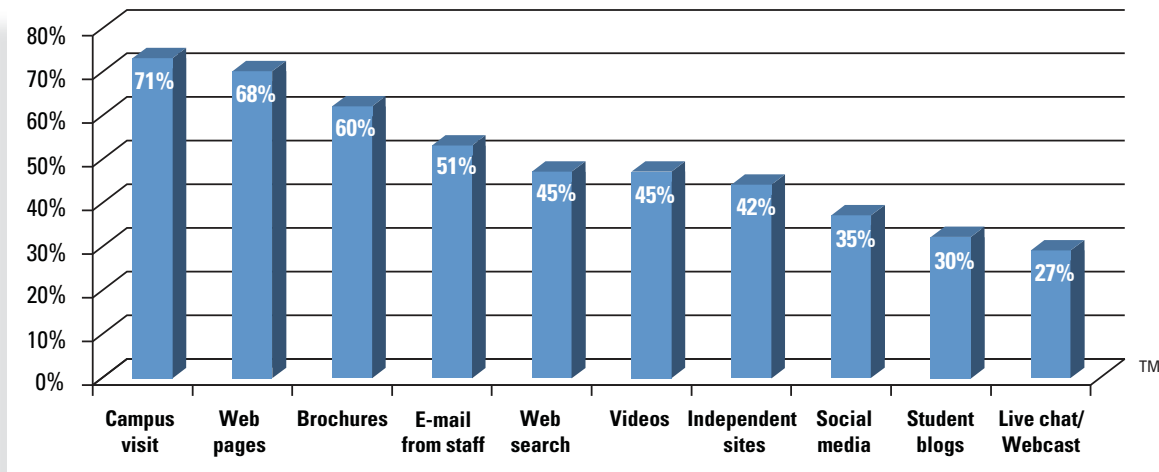
E-Opportunity: Make net price calculators visible and customizable

Net price calculators provide an opportunity to not only answer questions on cost but position campuses competitively on price, especially if the calculator includes merit aid in the estimate. It's important to make these calculators easy to find by placing them on high-traffic pages, such as admissions and financial aid, or in the site's navigation.

Many campuses also report not yet posting calculators on their site. According to the *2012 E-Recruiting Practices* study, 90 percent of four-year private campuses, 77 percent of four-year publics, and 59 percent of two-year colleges have done so. Campuses that have not posted a calculator or have one that does not include merit aid estimates should investigate the advantages of using calculators that can provide more accurate and competitive net price estimates.

In another financial aid finding, 66 percent of students also said that they preferred receiving notices about financial aid awards by both mail and e-mail, with 27 percent answering by postal mail and just 8 percent by e-mail.

What are the best ways to learn about the campus location and community?



Many campuses have different terminology for labeling links about campus life and culture. What link names do students look for to find out how they might "fit in" with a campus?

- Student life (33 percent)
- Athletics (7 percent)
- Campus life (21 percent)
- Current students (7 percent)
- Visit campus (8 percent)
- Future students (6 percent)
- Clubs and organizations (8 percent)
- Prospective students (4 percent)

Expectations and experiences with campus tours—real and virtual

Two-thirds of all students said they had already visited at least one college campus, with four out of five seniors noting they had.

Have visited at least one college campus:

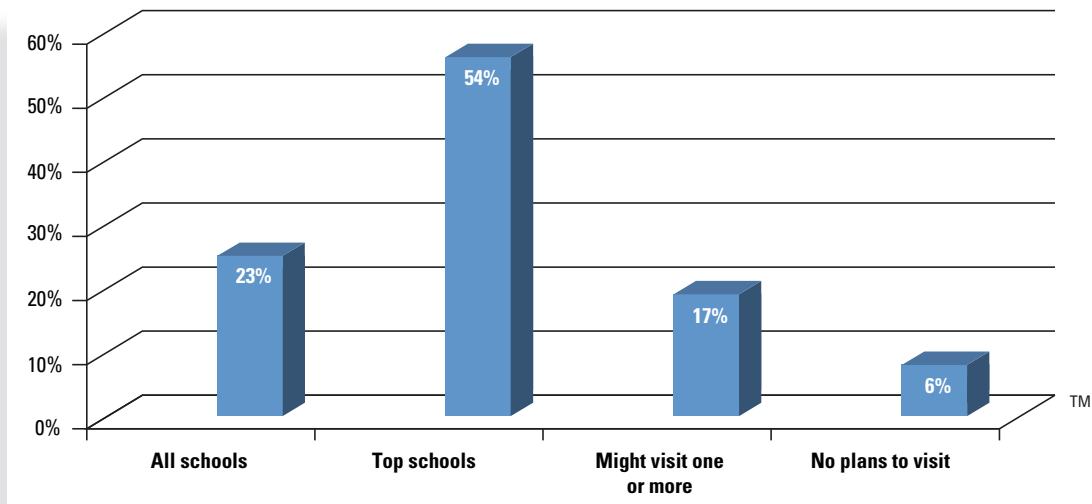
- Seniors (80 percent)
- Juniors (54 percent)

Nature of the visit:

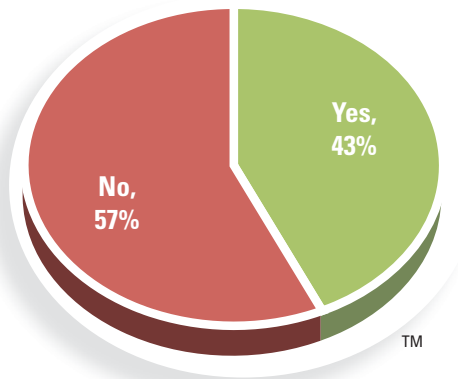
- Formal visit with admissions representatives and campus tour (68 percent)
- Informal visit (32 percent)

More than three-fourths of all students said they would at least visit their top choices, if not all schools, on their lists. Only 6 percent said they would not visit a campus, with 5 percent noting it was because of cost or distance.

Do they plan to visit college campuses?



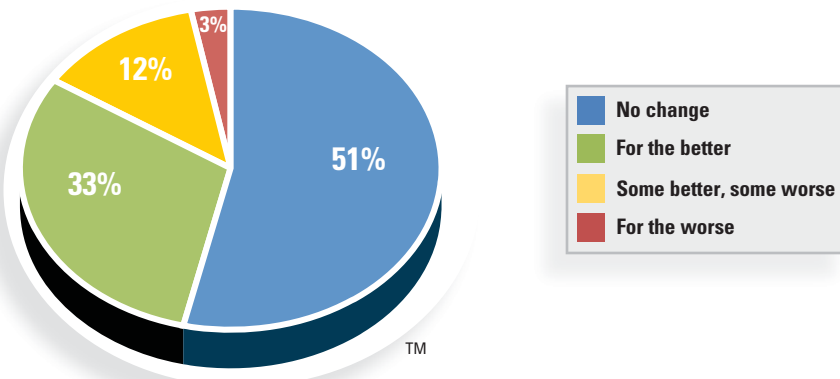
Have they viewed a virtual tour or interactive campus map?



Students reported the following reasons for taking a virtual tour or checking a map:

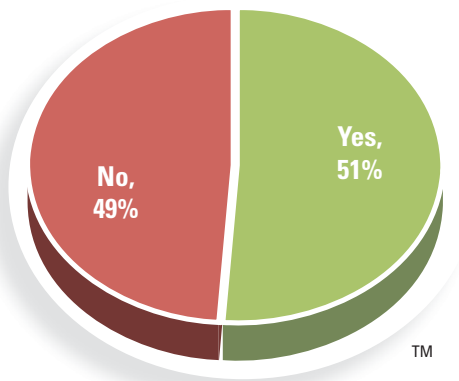
- See how big or small the campus is (32 percent)
- Learn more about the area around campus (26 percent)
- Get a sense of the buildings, architectural style (24 percent)
- See the insides of the residence halls/dorm rooms (11 percent)
- See what the people look like (4 percent)
- See how far it is from their home (4 percent)

Did viewing a campus map change their opinion of a campus?



Web site calendars

Have they looked at calendars on college Web sites?



There were some significant differences in students who said they had looked at calendars.

- 56 percent of seniors had looked at calendars, compared to 45 percent of juniors
- 57 percent of A-average students compared to 47 percent of B- and 42 percent of C-students
- 56 percent of Caucasian students and 54 percent of African American students compared to 39 percent of Hispanic students
- 58 percent of those who viewed sites on a mobile device compared to 46 percent who had not used a mobile device to look at a college Web site
- 62 percent of students who had viewed a college Facebook page reported looking at calendars

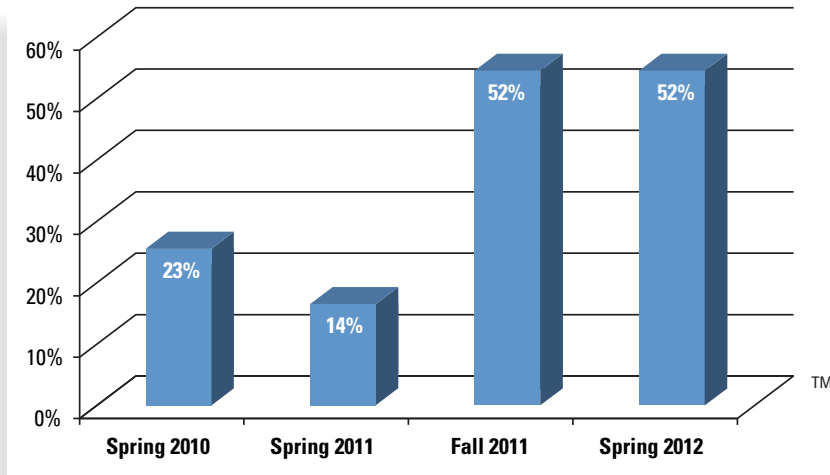
Of those who did look at calendars, 90 percent said it was worthwhile. They reported looking at calendars for information on the following:

- Admissions events (28 percent)
- Admissions deadlines (25 percent)
- Other (26 percent), including:
 - Campus tour/visit dates/open houses (15 percent)
 - Athletic events (7 percent)
 - Semester starts/move in (3 percent)
 - Scholarship deadlines (5 percent)
 - Cultural events (2 percent)
 - Just browsing (2 percent)
 - Activities (1 percent)
 - Orientation (1 percent)
 - Admissions deadlines (1 percent)

Mobile/Smartphone use in the search process

The 2010 E-Expectations study was the first in the series to poll students about using mobile devices to browse college Web sites. Since then, the number of students who said they have looked at college Web sites on their smartphones or other mobile devices has doubled. The following chart tracks this growth in the four E-Expectations studies conducted between 2010-2012.

How many students with mobile devices have looked at college Web sites on those devices?

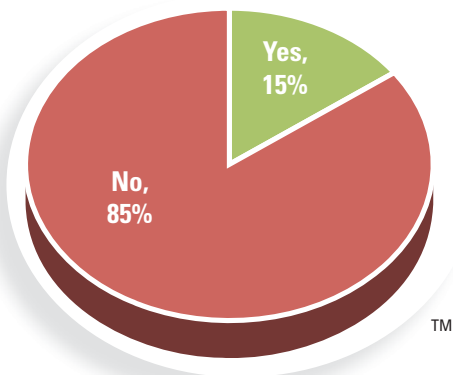


The use of tablets has also grown dramatically. In the fall 2011 trend report on mobile use, only 4 percent of students reported using a tablet (iPad or Android-based tablet) to look at college Web sites. In this 2012 study, 20 percent of those who looked at college Web sites on a mobile device did so on a tablet. Those numbers will likely continue to rise in the foreseeable future.

For those students who owned a mobile device and did not use it to look at college Web sites, 52 percent said that they did not do so because they preferred looking on a PC or laptop computer—by far the greatest reason given.

QR codes—the square bar codes that can be scanned with a mobile phone to go directly to a Web page—have become a popular marketing tool as the use of mobile devices has grown. However, most students have not used them.

Have they used a QR code from an admissions brochure or advertisement to learn more about a college or university?



Juniors were slightly more likely to have used QR codes (17 percent versus 13 percent of seniors). This result doubled since the 2011 study, when just 6 percent of students had used QR codes. Among students who did use QR codes, 84 percent said it was worthwhile.

E-Opportunity: Optimize key Web pages for mobile and use QR codes on marketing materials

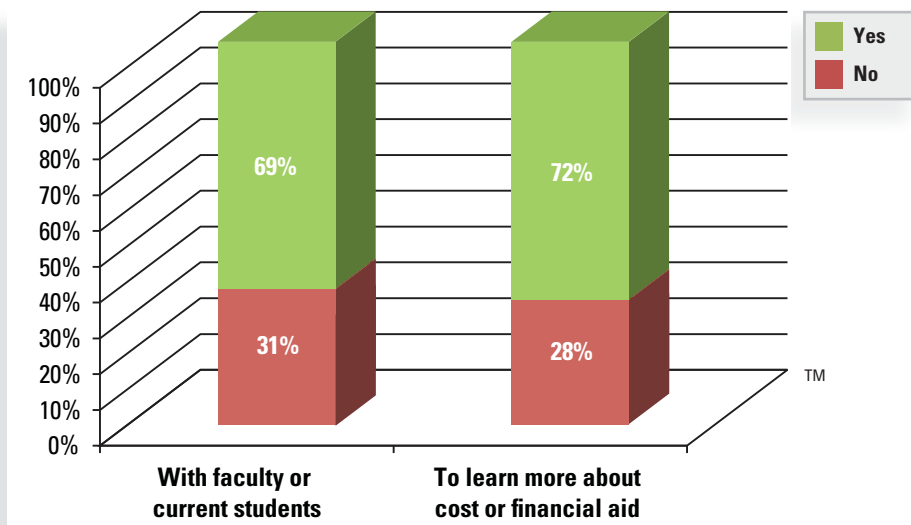
With half of students browsing college Web sites on mobile devices, campuses should optimize their sites for mobile browsing. Among campuses, 35 percent of four-year privates, 39 percent of four-year publics, and 7 percent of two-year colleges have sites optimized for mobile devices.

Even though many students reported not using QR codes, their use is growing. They also provide an opportunity to capture the attention of mobile users while tracking results for campus marketing pieces. Many campuses do use QR codes, with 67 percent of four-year privates, 61 percent of four-year publics, and 41 percent of two-year schools using them.

Live chats and Webcams

Live chats are possibly one of the most underutilized e-recruitment methods, with students showing significant interest despite many campuses not using them.

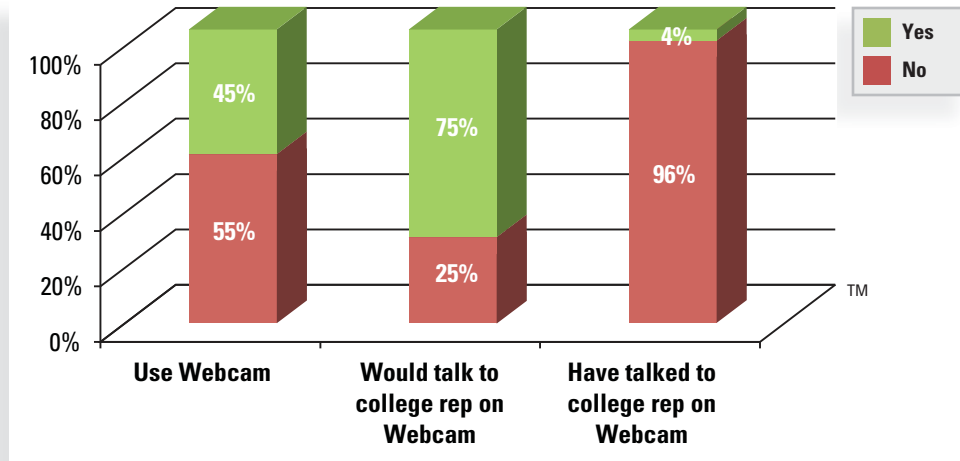
Would prospective students participate in live chats?



Compared to Caucasian students, African American students were considerably more likely to participate in chats with faculty or students (80 percent to 63 percent). Both African American (82 percent) and Hispanic (78 percent) students showed greater interest in chats about cost/financial aid than Caucasians (64 percent).

Similar to live chats, campuses may be missing an opportunity to connect with students via video chat over Webcams. Respondents showed a fairly high level of use of Webcams and a significant willingness to interact with college representatives via Webcam. However, very few had actually done so, most likely because few colleges host Webcasts.

Are they interested in using Webcams to interact with college personnel?



In terms of Webcam use among different ethnic groups, 62 percent of Asian American students and 52 percent of African American students used Webcams compared to 46 percent of Hispanic students and 39 percent of Caucasian students. Students from the Northeast and upper-income students were also more likely to use Webcams than students from other regions or economic brackets. Finally, 81 percent of juniors said they would be willing to speak with campus representatives via Webcam, compared to 69 percent of seniors.

E-Opportunity: Consider using live chats, video chats, and Webcasts to connect with students

With a significant number of students showing willingness to participate in live chats, video chats, and Webcasts, campuses have three ways for building more personal connections with prospective students. Results from the *2012 E-Recruiting Practices* study suggest these are untapped possibilities for campuses.

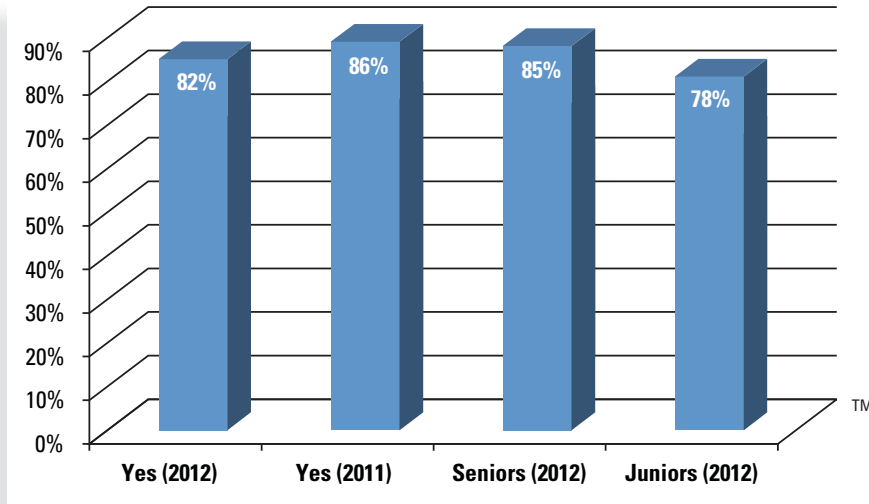
Practices	Four-year private	Four-year public	Two-year
Live chat	34%	39%	7%
Webcam conversations	11%	10%	0%
Webcasts	10%	16%	7%

Live chat saw a significant increase in use by four-year campuses. In 2010, 15 percent of four-year private and 21 percent of four-year public campuses reported using live chat.

E-mail and text messaging

If there is one finding that can be taken from nearly all respondents, it is that they show great interest in receiving e-mails from campuses they are interested in attending. Their willingness to share e-mail addresses and open e-mail was nearly universal. Most also use e-mail at least once per week, although their use is down slightly from the 2011 E-Expectations study.

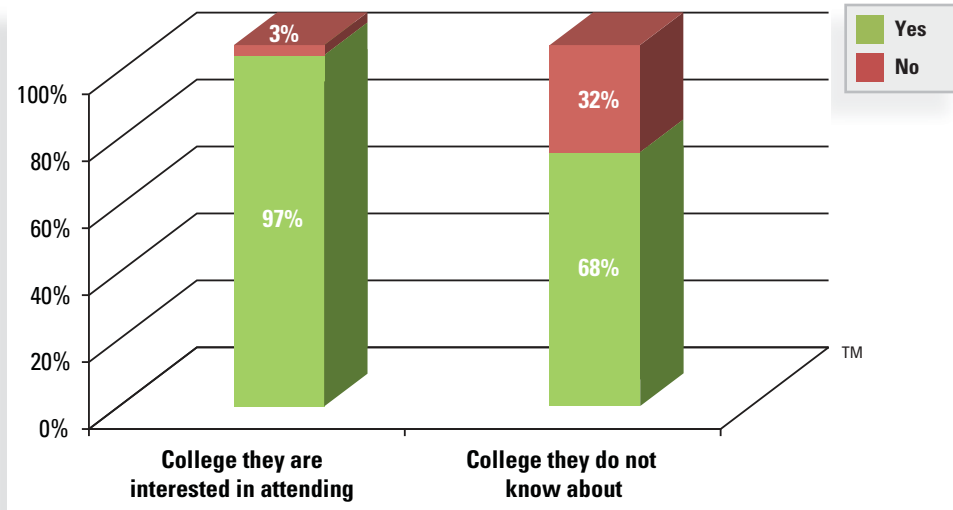
Do students use e-mail at least once a week?



There were other significant differences among respondents. Ninety-six percent of Asian American students said they used e-mail at least once per week, compared to 80-83 percent among Caucasian, Hispanic, and African American students. Looking at academic performance, 86 percent of A-students and 82 percent of B-students answered yes to this question, compared to 68 percent of C-students.

Nearly all students (93 percent) gave colleges and universities an e-mail address, and of those, 95 percent provided their own personal e-mail. Fifty-five percent of students said they provided that e-mail when prompted by the campus; 40 percent said they did when completing an application.

Will they open e-mail messages from a college or university?

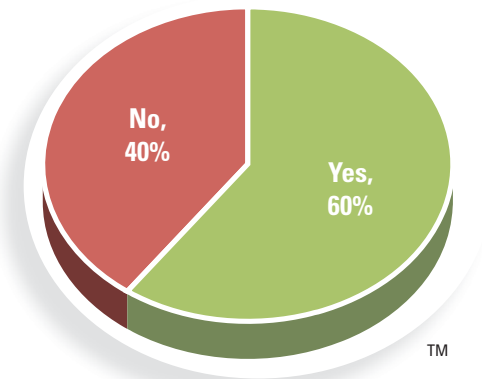


There were some interesting differences among various groups regarding institutions unknown to students:

- 76 percent of juniors said they would open those e-mails, versus 63 percent for seniors
- B-average students were significantly more likely to do so (73 percent) than A-average students (62 percent)
- Nearly three-quarters of African American students (74 percent) said yes, compared to 63 percent of Caucasian students
- Those at the inquiry stage were significantly more likely (73 percent) than those with at least one acceptance (63 percent)

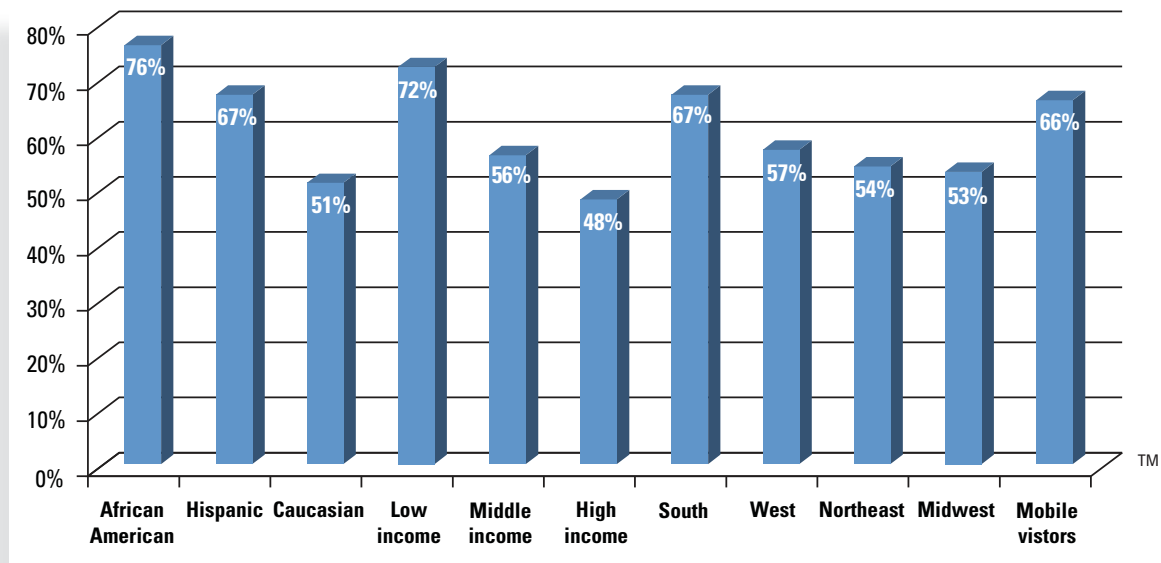
The majority of students also said they would be willing to receive text messages from an admissions representative.

Are they willing to receive text messages from a campus representative?



Some student populations were significantly more willing to receive text messages than others.

Who would be open to receiving text messages from campus representatives?

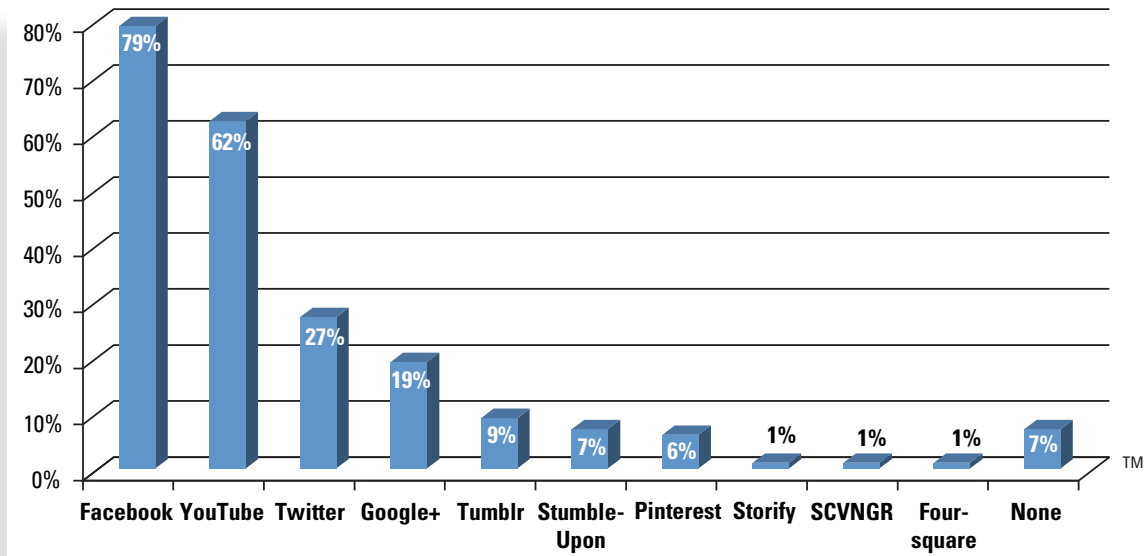


E-Opportunity: Give students the opportunity to opt in to text messages

Text messages provide an easy, efficient, and cost-effective way to connect directly with large numbers of students, especially for communicating special offers or upcoming deadlines. Currently, 42 percent of four-year private campuses use text messages in recruitment, while 31 percent of four-year public and 24 percent of two-year campuses use text messages.

Social media

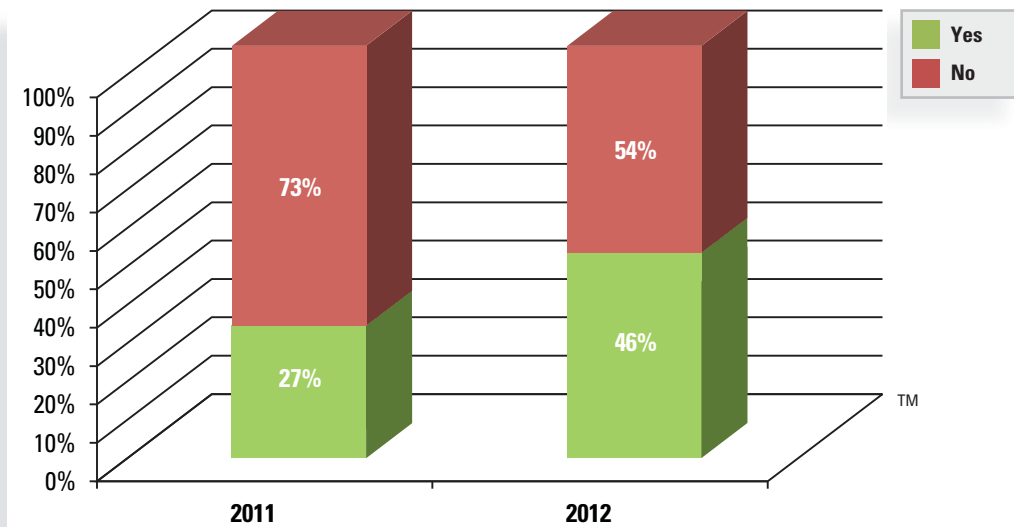
Which social media resources do they use at least once per week?



Compared to the 2011 E-Expectations results, Facebook use remained consistent. However, YouTube use rose from 55 percent to 62 percent, while Twitter jumped from 9 percent to 27 percent. Forty-four percent of African American students said they used Twitter, considerably more than other ethnic groups, while 35 percent of upper-income students said they used Twitter at least once per week.

Compared to 2011, students reported a substantial increase in visiting college Facebook pages.

Have they visited a college's Facebook page?



Furthermore, 69 percent of respondents said they had “liked” a college’s Facebook page.

What did they expect to find after doing so?

- Information about admissions deadlines and events (36 percent)
- Information about academic programs (34 percent)
- Updates through the news feed (30 percent)
- The name of the school to appear in their “likes” (30 percent)
- Special information unavailable elsewhere (26 percent)
- Interaction with page administrators (26 percent)
- Contact from school about admission (26 percent)
- Photos and videos (25 percent)
- Interaction with other people who like the page (21 percent)
- Posts to share (20 percent)
- Specific information tailored to the user’s profile (18 percent)

They also said how often they expected updates on Facebook pages.

- More than once a day (5 percent)
- Once a day (14 percent)
- Every other day (16 percent)
- Twice a week (20 percent)
- Once a week (28 percent)
- Twice a month (7 percent)
- Once a month or less (6 percent)
- Never (2 percent)

Campus social media practices

For a detailed list of campus social media practices, see the *2012 E-Recruiting Practices Report* at www.noellevitz.com/e-recruitment2012

Recommendations

1) Provide content that addresses the needs of all key audiences coming to your Web site

As responses from juniors and seniors in this study show, students who are in different stages of the funnel have different expectations and priorities for information. Make sure you have content that addresses their informational needs. Likewise, with two-thirds of students researching colleges with parents and guardians, provide content for those decision influencers as well.

While college Web sites are certainly a prime tool for attracting prospective students and generating inquiries, they are also valuable for students further in the enrollment process. Keep in mind that juniors and seniors will have different information needs and expectations—provide content that will be appropriate for each audience.

2) Move forward with mobile optimization

While half of students report browsing college Web sites on mobile devices, fewer than 40 percent of four-year campuses and just 7 percent of two-year schools have optimized for mobile devices. The number of students browsing on mobile phones and tablets is likely to increase rapidly, so invest in mobile optimization now. For campuses that do have mobile sites for students, find ways to engage them actively. Having a cost/scholarship calculator, videos about campus life and learning, and live chats are ways to connect with mobile users and give them something more to do than scroll through content.

3) Ensure key content is updated and easy to find

The findings clearly show that students' opinions of your college can be severely harmed when important information is difficult to find. Make it easy for first-time visitors to easily navigate to key information regarding academics and program information, cost and the admissions process, and campus visits. Keeping this content fresh by updating it frequently is also important for search engine optimization, as fresh content typically ranks higher than stale content.

4) Take advantage of students' willingness to use live chat, Webcams, and text messaging

Respondents to the 2012 survey not only use live chat and Webcams frequently, they are also quite open to campus representatives contacting them through these methods. Consider incorporating live chat and video chat in order to make stronger, more personal connections with students (especially out-of-state or international students who cannot easily visit). The same goes for text messaging—give students the opportunity to opt in to text messages, and use these messages to communicate information such as key deadlines or further opportunities to connect with your campus.

5) Make your net price calculators easy to find

After academics, cost is the second greatest consideration for students, and net price calculators are one of the most efficient ways to immediately communicate cost. Put calculators in prominent places on your site—financial aid and admissions pages, or in your main navigation. Consider deploying net price calculators that can be customized for merit aid, so you can provide the most competitive price estimate possible.

6) Keep the e-mail flowing and test what works with e-mail

Students will read e-mail, especially from campuses on their list. That propensity to open messages also provides a great opportunity to test messages, landing pages, and other content items.

7) Focus your social media assets where they will have the greatest impact on enrollment

For social media to be an effective e-recruitment tool, campuses have to focus and be active with the social media tools they use. Trying to do too much across too many different social media will result in unfocused, unsuccessful efforts. Keep an active presence on Facebook, YouTube, and Twitter, while also keeping an eye on emerging social media outlets.

What are the most effective ways to meet the e-expectations of students?

How can you build stronger connections with prospective students—the kinds of connections that engage them online and bring them closer to enrolling at your campus?

Learn more about how you can build on these findings and optimize the enrollment impact of your e-recruiting efforts by contacting Noel-Levitz. Send us your questions, challenges, or concerns, and we will share our research and experience with you.

E-mail: ContactUs@noellevitz.com

Call: 1-800-876-1117

About the survey sponsors

Noel-Levitz is a recognized leader in higher education consulting and research. For nearly 40 years, they have partnered with more than 2,700 campuses to optimize enrollment management and student success through experienced consultation, advanced analytic tools, and campus assessments.

OmniUpdate is the leading Web content management system (CMS) provider for higher education. Their enterprise Web CMS, OU Campus™, empowers institutions to effectively manage and enhance their Web presence and take advantage of the latest Web and mobile technologies.

CollegeWeekLive is the leading channel for live conversations with prospective students. Colleges reach high schools they do not travel to, engage students in an online environment they prefer, and improve results at every stage of the enrollment process.

NRCCUA (National Research Center for College & University Admissions) conducts the nation's largest educational planning survey among high school students. This valuable program facilitates a key link between the individual educational goals and preferences of students and the vast offerings of colleges and universities.

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Questions about this paper

If you have any questions or comments about the E-Expectations study, please contact Noel-Levitz at 1-800-876-1117, or e-mail ContactUs@noellevitz.com.

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