HOW DO MILLENNIALS RESEARCH UNIVERSITY?

THE ONLINE JOURNEY FOR PROSPECTIVE UNDERGRADUATES IN THE UK

SIGN IN

QS

Contents

About the Report

The technological revolution, and the ease with which the internet allows us to access information, has transformed the way the world works. Nowhere is this more true than in higher education. Young people are on the frontier of any new technology, and embrace it even more rapidly than other groups. For this reason, it's essential that universities are up to date with current trends, to enable them to communicate effectively with their target audiences.

The QS Global Trends reports[1] have consistently found students placing an emphasis on online tools for researching education. In the "Students Online: Global Trends" report from 2014[2], almost two-thirds of survey respondents said they considered online and offline resources equally important, while just over 30% placed greater emphasis on the online world. In the UK alone, 92% of people use the internet daily, 48 million are active on social media[3] and 40% of 16-24 year olds said they couldn't live without a mobile device[4].

Focussing on the undergraduate demographic, the report aims to show not just the importance of online research for prospective students entering higher education, but also how they go about that research. The following pages explore the significance of specific types of online resource, the reasons prospective students consult them, which devices are used for this purpose, and common difficulties applicants face. The aim is to contribute to the information available to universities seeking to better understand the needs and preferences of the 'digital generation', in order to optimise recruitment campaigns and make informed decisions about which channels to prioritise.

1. *Students Online: Global Trends (2015)*,
http://www.qsdigitalsolutions.com/resources/students-online-global-trends-2015/#qs_res_form_section

2. *Students Online: Global Trends (2014)*,
http://www.qsdigitalsolutions.com/resources/students-online-global-trends/#qs_res_form_section

3. *Digital in 2016*,
http://wearesocial.com/uk/special-reports/digital-in-2016

4. *Media Consumer 2015: The Signal and the Noise*,
http://www.deloitte.co.uk/mediaconsumer/assets/pdf/Deloitte_Media_Consumer_2015.pdf

Methodology and Demographics

Who took part in the survey?

Gender

34%   66%

Age

17 or under | 88%
18-21 | 8%
22+ | 4%

Level of education completed

89%

🟢 High school
🟠 Other
🟡 Undergrad

Course of interest
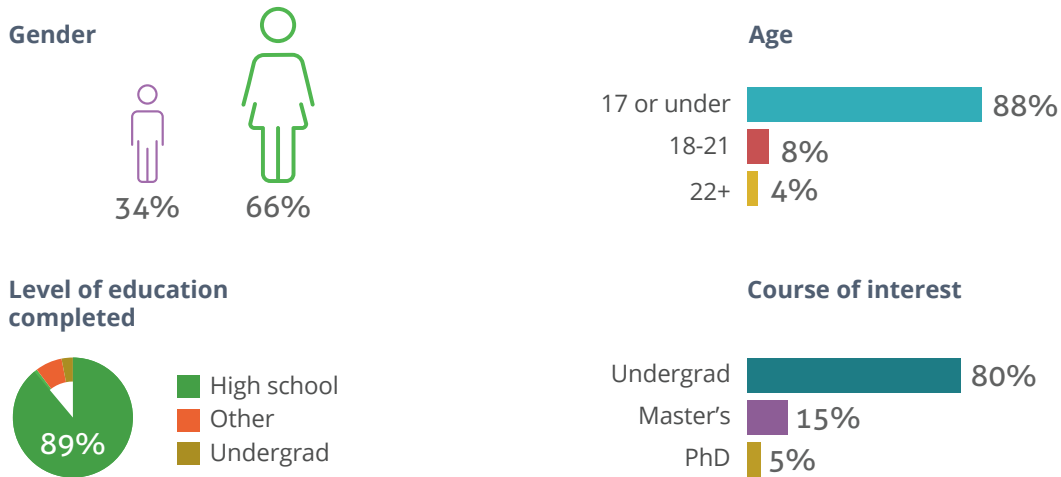
Undergrad | 80%
Master's | 15%
PhD | 5%

Fig.1

The survey was conducted via a questionnaire given to attendees of a face-to-face student recruitment event, part of the QS World University Tour in London, UK, between autumn 2013 and spring 2016. The tour offers an opportunity for universities and prospective students to meet and discuss courses, and is focussed predominantly on those applying at undergraduate level.

Of the students who took part, 66% were female and 34% were male. The majority (88%) of respondents were aged 17 or under, a further 8% were aged between 18 and 21, while the rest were older. In line with these age trends, 89% were in secondary education at the time of the survey.

While 80% were looking for undergraduate degrees, 15% were seeking master's programs and 5% were interested in PhD study. Of those who answered the question, 44% said they were interested in studying abroad, 4% said they could be interested in studying abroad, and only 9% weren't interested at all.

Are respondents interested in studying internationally?

Yes

47%   41%

No

12%   4%
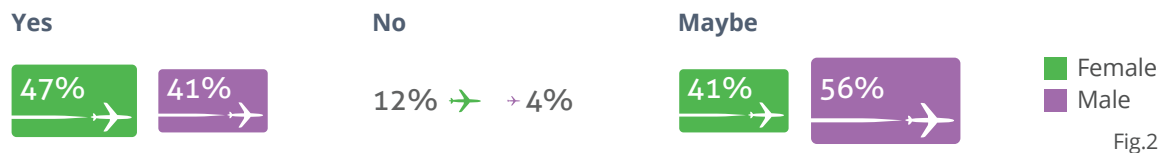
Maybe

41%   56%

🟩 Female
🟪 Male

Fig.2

Interestingly, 47% of female respondents said they were definitely interested in studying abroad, compared to only 41% of the men. Meanwhile 12% of women were definitely not interested, compared to only 4% of men; and 41% of women said they could be interested, compared to 56% of men. These results suggest that the male candidates were more likely to be swayed at a later time, whereas the female candidates had more of a certain idea about whether they wanted to go abroad.

Key Findings

- **Official websites are perceived as an essential source.** Official university websites were deemed the most essential tool for online research by survey participants, with an overwhelming 71% regarding them as such. Overall, 90% of respondents rated official websites as at least 'quite important' to their searches.

- **Social websites play an important part in the decision making process.** Social media, chat rooms and forums were regarded by respondents as important predominantly for 'getting ideas' about their university choices. This suggests that while they may not actively use these tools to search for specific information, social platforms still play a role in their overall decision.

- **Applicants are struggling to find information about finances and applications.** When asked which information they struggled to find most, respondents rated scholarships, financial information and details about the application process as the hardest to find out about online.

- **Online sources are valued over offline sources.** It's clear that participants were interested in offline resources as they were attending a face-to-face event. However, most respondents said they valued online research tools more than offline tools.

- **Video content is becoming hugely influential.** YouTube was rated the second most-used social media website, after Facebook, when researching universities. Over the course of the survey, use of this social network for researching universities grew from 24% in 2013 to 29% in 2016.

- **Students are increasingly researching universities on mobile devices.** The number of students researching universities via smartphones grew over the period of the survey, from 48% in 2013 to 62% in 2016. This reflects wider technological trends. In 2012, around 25% of people using a mobile device used a smartphone; this number is expected to double by 2018[5].

- **Email remains the most popular communication tool in this context.** Some 80% of respondents said their ideal method of being contacted by universities was email, and 67% felt the same way about initiating a communication with universities themselves. Despite this, offline methods such as phone calls and letters are still in-demand, offering channels which may appear more official and suited to the context.

- **Female students are more mobile in their search.** Female respondents outranked male students for use of smartphones and laptops, while males were more likely to use desktops. Females were also more likely than their male counterparts to rate online and offline resources equally, and less likely to prefer one over the other.

5. https://www.statista.com/statistics/285596/forecast-smartphone-penetration-amongst-mobile-users-worldwide/

Section 1: How Are Students Using Online Resources?

How important is each type of online resource when researching universities?

71%
**Universities'
official websites**

46%
**University
ranking websites**

44%
**Other websites
about universities**

33%
Forums/chat rooms

37%
Social media

■ Essential ■ Very important ■ Quite important ■ Not so important ■ I don't use it
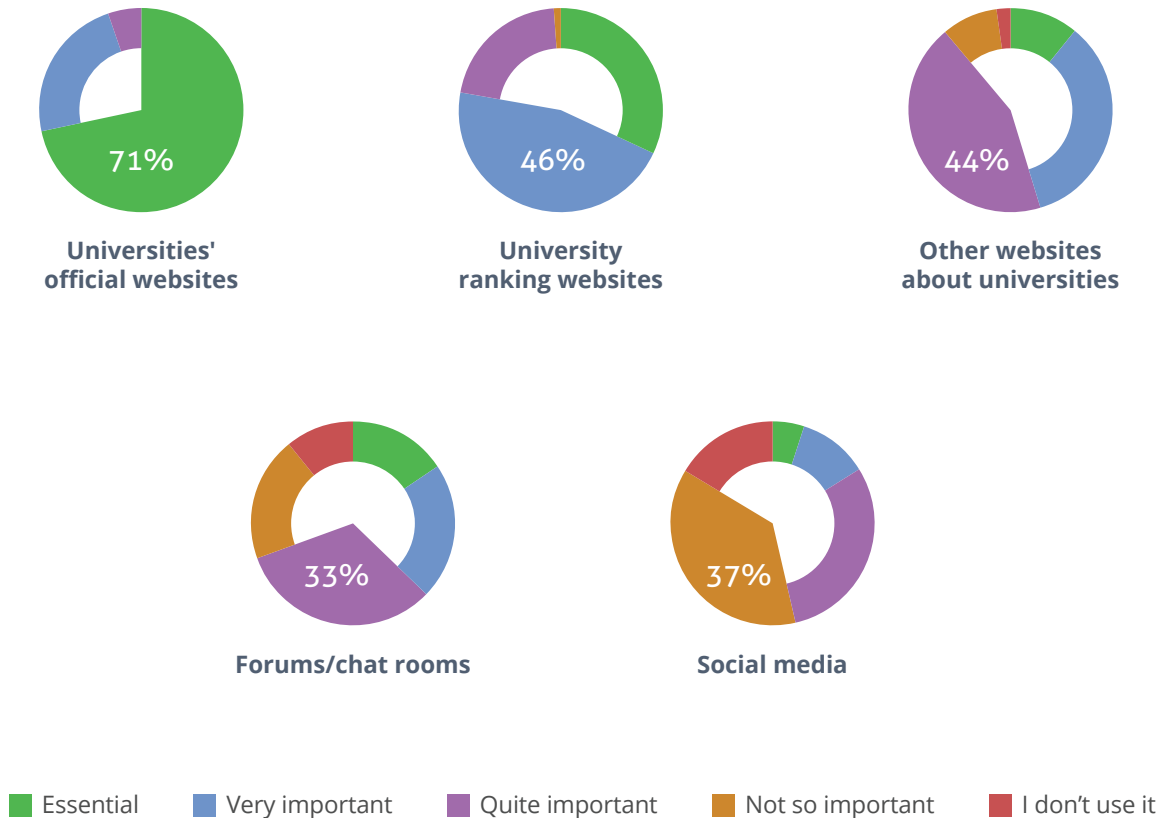
Fig.3

A major focus of the survey was understanding which online resources students find most important during their research. We asked them to rate the importance of each to establish which they rely on most for information.

The results show that prospective students view official university websites as the most important online resource for their research, with almost 71% classifying these as 'essential' and another 23% as 'very important'. No respondents said they didn't use official university websites, while less than 1% said they were 'not important'.

Rankings were also felt to be very important, with almost a third of students marking these as 'essential', and a further 66% rating them as either 'quite important' or 'very important'.

Social media was the least-used online resource in this context, with the majority of participants saying they didn't use it or that it wasn't important when researching universities. However, when we asked students how they used each type of resource, it emerged that while not as significant as official websites, social media still has a role to play.

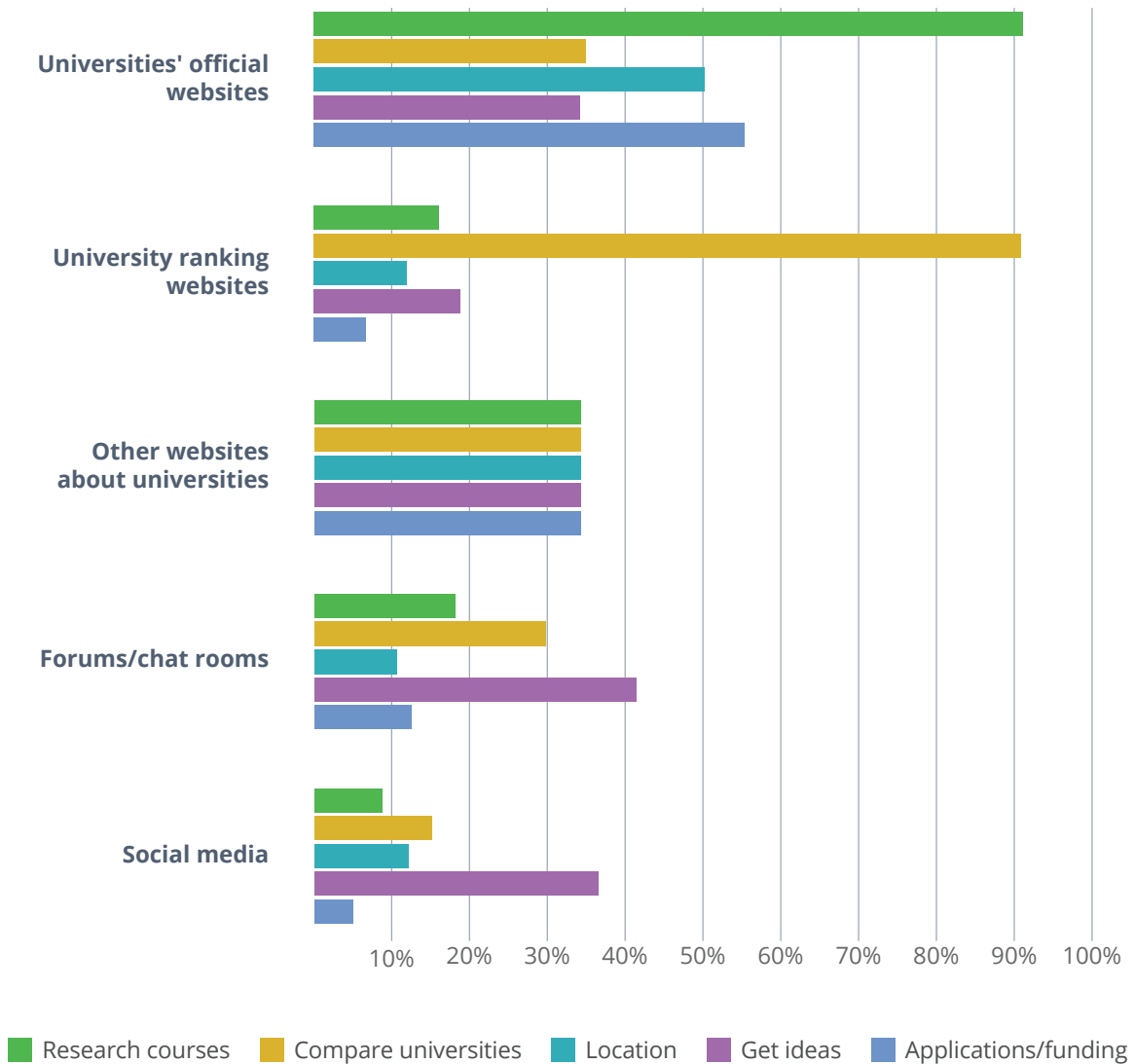## *Why do students use each type of online resource?*

Fig.4

This question was designed to understand exactly why students used specific websites, and what they felt were the predominant strengths of each type of resource.

Students' research on courses was carried out mostly on official university websites, with 91% responding that they used them for this reason. Official websites were also used by 55% to search for information about scholarships and funding, while 50% were looking for information about the location of the institution.

Official websites were also used to compare universities, but not to the same extent as rankings websites, which were used by 90% of respondents for this reason. Around 20% said they used rankings to 'get ideas', and just over 15% researched courses using rankings.

Peer-to-peer is still important

Nearly all students surveyed considered forums and chat rooms an important part of researching universities; only around one in five said they did not use them or thought they were unimportant. These platforms were used by 41% to get ideas about universities, and by 30% of respondents to compare institutions. This is a similar level to official university websites, which suggests that when discussing the merits of individual institutions, students are often just as interested in peer reviews and the thoughts of other students as they are in official guidance.

Today's prospective students are particularly discerning when it comes to online marketing and – with the advancement of digital communication – trustworthy online reviews form the basis for many decisions. According to the "Young Blood" study, carried out by Amplify, 44% of millennials would trust reviews from friends over advertising[6], and this demand for peer reviews applies when choosing a university. Forums and chat rooms offer prospective students those highly valued first-hand accounts.

The significance of social media

Social media has been tipped as one of the most influential forms of marketing in the 21st century, yet the survey results suggest this is not necessarily the case for students researching universities. Around 37% of survey respondents said they did not find social media important in their university search, while 16% said they didn't use it at all for this purpose.

However, perhaps this is due to the nature of the questionnaire. When people consider their research habits, they may be thinking about actively searching for institutions. It may be that the role of social media is more casual. Over a third of surveyed students said they use social media to get ideas about universities, to compare them and to find out about locations – suggesting that there are in fact several useful roles for social networks to play.

One interesting point to note is that the second most-used social media network, after Facebook, is YouTube. This is particularly significant given ongoing developments in video marketing; indeed 90% of men and 78% of women aged 16-24 stated that they watched at least one short-form video a day, and 40% of this age group said they watched more than 30 minutes each day[7]. Video is tipped to become the dominant medium of entertainment and information in the coming years; predictions show that 69% of all consumer internet traffic by 2017 will be video[8].

6. *Young Blood, Amplify*
https://issuu.com/weareamplify/docs/amplify_whitepaper_digital_050516-f

7. *Media Consumer Survey 2015,*
http://www.deloitte.co.uk/mediaconsumer/

8. *Cisco Visual Networking Index: Forecast and Methodology, 2015–2020*
http://www.cisco.com/c/dam/en/us/solutions/collateral/service-provider/visual-networking-index-vni/complete-white-paper-c11-481360.pdf

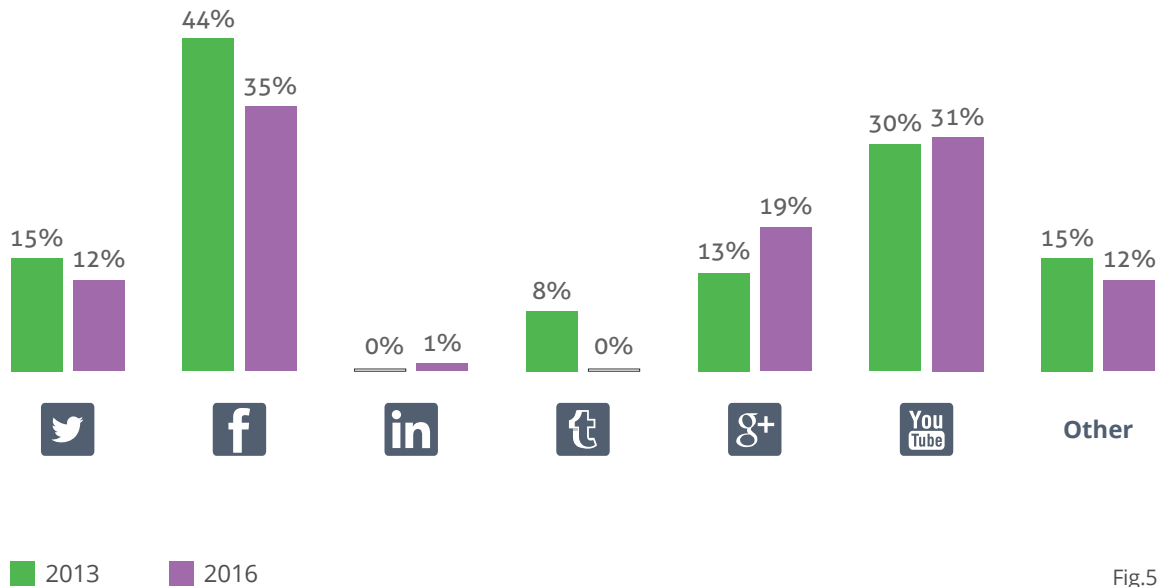*Which social networks do students use to research universities?*

Fig.5

Legend: ■ 2013 ■ 2016

Twitter: 15% / 12%
Facebook: 44% / 35%
LinkedIn: 0% / 1%
Tumblr: 8% / 0%
Google+: 13% / 19%
YouTube: 30% / 31%
Other: 15% / 12%

The increase in students researching through their mobiles and tablets is also significant here; as we'll see later, the number of students using smartphones grew by 13% between 2013 and 2016. Videos are far easier to consume on mobile phones than scrolling through several pages of text, they require less effort than reading, and are often more entertaining; as mobile technology continues to develop, the importance of video marketing will grow in tandem.

Comparing the years, one interesting trend is that Twitter and Facebook are actually used less in 2016 than they were in 2013. Twitter usage to research universities dropped by over 3% and Facebook by a more significant 10%.

Social media usage did not vary that much between male and female participants, although our data findings show that two channels stood out from the rest: 36% of men surveyed said they used Facebook to research universities, compared to only 27% of women, and only 1% of men used Tumblr, yet 4% of women did.

◯ HIGHLIGHTS

The second most-used social platform is YouTube, underlining the growing importance of video in university marketing.

Section 2: What Do Students Search For?

The main thing students say they search for when researching universities is information about a particular subject; around 70% of survey participants selected this option. This suggests that students are particularly focussed on finding out about courses on offer in their desired subject area, providing an impetus for universities to ensure program information is readily accessible and optimised for relevant online searches.

The second most common search topic was course type; 55% of respondents said they would search for this. Details such as study level, qualification type and duration are important at an early stage of the research process, and should again be made clear and easily obtainable for prospective students.

Finally, over a third of respondents identified location as something they specifically searched for. The fact that this is the least-cited of the three options could suggest either that students start out with a clear idea about where they want to study already, or that they're open to a number of locations and perceive this information as secondary to finding the right course.

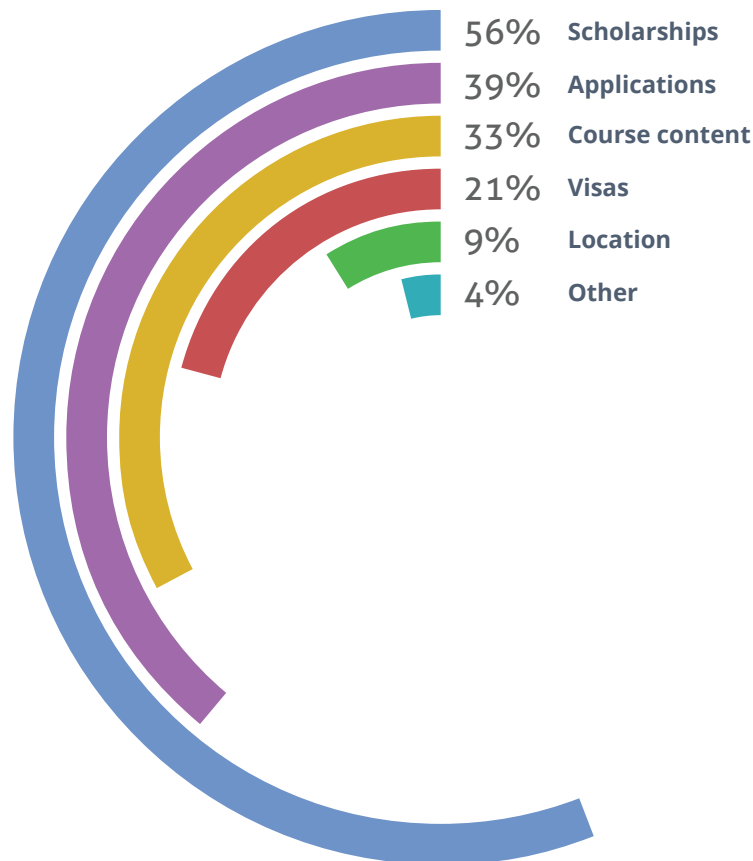*What type of information is difficult for students to find?*

56% **Scholarships**
39% **Applications**
33% **Course content**
21% **Visas**
9% **Location**
4% **Other**

Fig.6

What information is the most difficult to find online?

The results show that a large number of prospective students have difficulty finding information online when researching universities. Around 56% struggled to find funding-related information, 39% had difficulties finding out about the application and admissions process, and just over a third struggled to find details of course content. Visa information was a problem area for 21%, while just under 10% had difficulties finding all they wanted to know about the location of the institution.

According to a Google study[9], 61% of users will leave a mobile site if they don't find what they're looking for immediately, and this picture has also clearly emerged from our own focus groups with prospective students around the world. One student explained, "If a lot of the detailed information is missing [on a website], I choose not to apply."[10] Others stated that a poor website would leave them with a negative impression of the university as a whole, illustrating the role of a well-optimised website in both facilitating applications and upholding reputation. The fact that the majority of students surveyed reported some difficulty in finding information shows that there is still significant scope for website improvement.

HIGHLIGHTS

Over half of surveyed students struggle to find finance-related information about their courses.

9. *Mobile Path To Purchase: The New Shopper Mindset (2014)*
http://www.mobilepathtopurchase.com/wp-content/uploads/2012/08/2014MPTP_The-New-Shopper-Mindset_FINAL_6.19.14.pdf

10. *What Matters to International Students? Focus on South East Asia*
http://www.qsdigitalsolutions.com/resources/what-matters-to-international-students-focus-south-east-asia/

Section 3: Resources

Which devices are used for research?

85% 90% 33% 35% 26% 25% 48% 62%

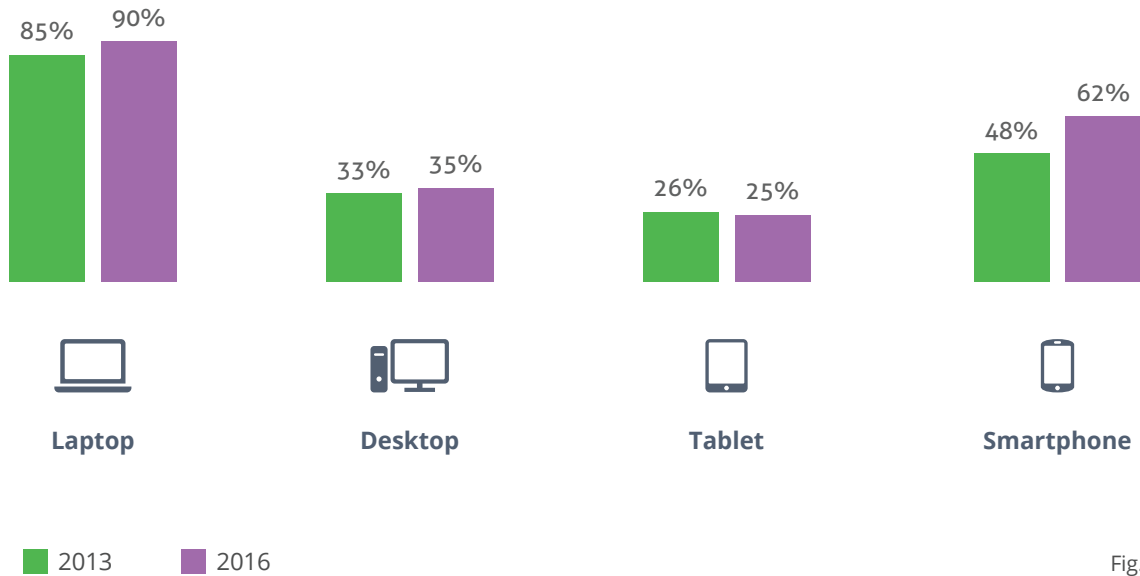**Laptop**   **Desktop**   **Tablet**   **Smartphone**

■ 2013   ■ 2016

Fig.7

How do students access information?

Despite attending a face-to-face university fair, which shows interest in offline sources of information, most respondents said they valued online research tools over offline tools, by 20% to 4%.

The gender divide for this question is also particularly interesting. Participants were asked which type of research they found most useful: 'online', 'offline' or 'both equally'. Women were more likely than men to view online and offline research methods as equally important, whereas men generally favoured one method over the other.

However, when respondents were choosing directly between online and offline, the results were very different. In this case, 86% of women favoured online compared to only 82% of men, and 18% of men felt that offline was more beneficial to them, compared to only 14% of women.

Survey participants were asked which devices they used to undertake their online research. Unsurprisingly, around 84% said they used laptops, and around 58% smartphones. The percentage using smartphones grew during the period in which the survey ran; in 2013 it was 48%, and by 2016 it had grown to 61%. This trend will continue, as internet usage becomes increasingly mobile.

Similarly, a report from CHEGG[11] found that mobile is becoming much more influential in higher education recruitment, with four out of five prospective students visiting college websites via a mobile device and one third of those actually submitting an application in this way.

Again, there are some interesting differences between the genders. The largest difference is in desktop computer usage, which is much more common among male respondents. Laptops were more likely to be used by women, but only by about 4%. Tablets were used by almost the same proportion of men as women, but smartphones were used by women more than men. The more widespread use of portable devices by women may suggest they're more likely to research universities in a variety of different settings, whereas the focus on desktops for men suggests an approach with a more fixed location.

HIGHLIGHTS

When choosing directly between online and offline research tools, women are more likely than men to favour online.

11. *Mythbusting Admissions: Where Prospects and Professionals Agree—and Disagree—on Enrollment Marketing, Messages, and Channels*
https://www.uaf.edu/files/provost/MythbustingAdmissions.pdf

Section 4: Communication Methods

How do prospective students contact universities?

Currently used

Ideal methods

FEMALE

MALE

67%

5%

19%

8%

18%

19%

Other

6%

65%

21%

11%

15%

12%

81%

16%

16%

2%

11%

77%

23%

2%

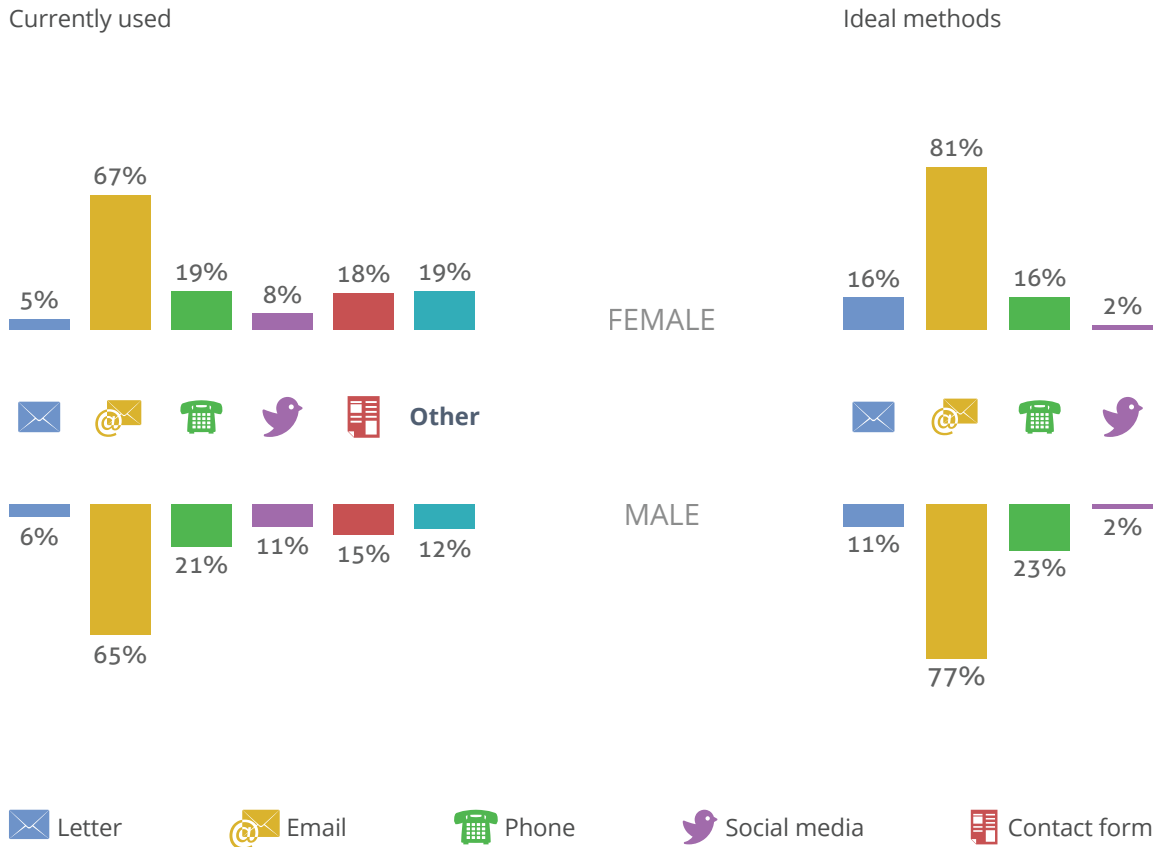✉ Letter @✉ Email ☎ Phone 🐦 Social media 🗐 Contact form

Fig.8

Do students want universities to contact them directly? Do they want to contact universities themselves? And if so, through what medium? One focus of the study was to look at the preferred communication methods for prospective undergraduates.

Exactly two thirds of respondents said that they do contact universities, and of that group almost 80% said their preferred communication tool was email. Female students were more likely than male students to contact universities via email, and more female students felt this was the ideal method of contact.

In contrast, more male students than female students were likely to contact a university by phone, and over 6% more men said they felt this was the ideal method – suggesting that they may favour more immediate methods of contact. In general, around one in five students wanted to communicate with universities by phone, and around the same number believed this was the ideal approach.

While 17% of respondents said they had used website contact forms, only 5% felt this was the ideal method. This suggests that some may feel forced to use contact forms because they can't find an alternative way of submitting an enquiry.

Social media is used less than the other methods of communication, which correlates with students' overall tendency to rank social media as less important than other online resources in this area of their lives. Male respondents were more likely to contact universities via social media, and also to rate this as their preferred channel; however only around 2% of all respondents felt this was the case.

When communicating with institutions, it seems some prospective students still want to use a more traditional and formal medium; written letters were selected by 14% as their preferred way of being contacted. Women heavily outweighed men in this regard, with 16% of female students feeling it was the ideal method, compared to 11% of men. Interestingly, in the opposite direction of communication – from student to institution – men were more likely to opt for written letters than women.

HIGHLIGHTS

The preferred communication tool for students, by a significant margin, is email.

Conclusions

Invest in your site

The results of the survey should galvanise universities into further developing their online strategy to reach prospective students. The difficulties experienced by students attempting to access information online make it essential for universities to ensure their websites are easily navigable and up to date. All information should be easily accessible, including course details, information about the application process, entry requirements, financial information and details about the location.

The continued growth of mobile and tablet usage should also provide universities with a reason to ensure websites are responsive and that content is suitable for a range of screen sizes. Research shows that 40% of people would leave a website that doesn't load within three seconds[12], and non-mobile optimised sites usually take much longer to render on portable devices. Technology changes so fast it's essential for universities to keep up with the developing market. This doesn't necessarily mean utilising every new app, but it does mean trying to stay relevant and accessible by understanding changing behaviours and technologies.

As this technology continues to develop, video marketing is going to become even more important. Video is in many cases easier to consume on mobile devices than text, allowing the creator to get a message across in an entertaining way, without requiring the user to scroll through reams of text, or indeed exert much effort at all. Embedded videos on websites can drive up traffic by 55%, and YouTube is actually watched by more young people in the US than cable TV[13].

YouTube is already the second most-used social network for researching universities according to our respondents, and as augmented and virtual reality and the internet of things continue to develop, video significance will only increase. Creating a video strategy, for those institutions which haven't yet invested in the technology, will become vital for success as time goes on.

Be everywhere

Respondents placed overwhelming importance on the online presence of institutions, both in regard to official websites and other online information resources. Social media may not have been rated as essential as other types of website, but it's still a vital part of the mix. Students will expect a university to be present on a number of different online platforms, and up to date accounts are an excellent way of interesting prospective students.

Social platforms are also an excellent way of utilising students and alumni, to promote the 'real' voice of the university. Only about 1% of millennials say they are influenced by advertisements[14].

12. *How Loading Time Affects Your Bottom Line*
https://blog.kissmetrics.com/loading-time/?wide=1

13. *Video Content is King: The Importance of Video Marketing [Infographic]*
https://www.impactbnd.com/blog/video-content-the-importance-of-video-marketing

14. *The Millennial Consumer*
http://millennialbranding.com/2015/millennial-consumer-study/

With the constant influx of ads online and on television, the current generation of prospective students is more savvy than ever, and capable of tuning out anything overtly commercial. Instead, they respond to authenticity and real-life examples they can relate to. The importance placed on forums, chat rooms and social media for 'getting ideas' in our survey shows that when searching for an institution, peer reviews and feedback are highly valued.

This is the reason alumni and 'brand ambassadors' are so important. They provide universities with authentic, trustworthy and reliable spokespeople. Universities should be investing in creating relationships with current students, who will then be happy to boast about their alma mater once they've graduated. Failing to form those links could leave students apathetic, or disenchanted with the institution. Students really are the best ambassadors, and a personal recommendation means far more than a traditional advertisement ever will.

Stay human

While there's a high price to pay for failing to invest in digital platforms, overlooking the human touch is equally likely to be just as detrimental. Our results show that regardless of the rapid development in online communication, direct marketing methods such as letters and phone calls are still valued by students.

This could suggest that prospective students appreciate more traditional forms of communication in a sphere which they expect to be professional and formal. However, there could also be a signal here about the importance of personalisation. Students want to feel valued as individuals; in the world of endless marketing emails and online adverts, direct communication through letters and phone calls can be more personal.

The personal nature of a phone call or personal letter should also be carried across to digital platforms and communication channels, so that whether online or offline, prospective students feel treated and responded to as individuals.

Contributors

Amelia Hopkins

Amelia Hopkins is a writer for QS whose work is featured on the company's B2B website, QS Digital Solutions. She writes extensively on higher education news, sector developments and university recruitment marketing strategies. Along with content creation, she also contributes to reports, whitepapers, social media management and idea development.

Georgia Philippou

Graphic designer Georgia Philippou creates innovative infographics and visualisations based on QS's research and rankings. Her work is featured on TopUniversities.com and TopMBA.com, and across the company's social media channels. Georgia is the lead designer for a range of print and online publications, including a popular range of guides for prospective students, as well as market research reports for higher education professionals.

Monica Vannozzi

Monica Vannozzi, Digital Marketing Manager of QS Digital Solutions, manages and leads all B2B communications for QS's universities division globally. Having completed her Master's in Marketing and Market Research, she has worked in the higher education sector for the past 5 years. Monica also introduced and manages the creation and promotion of higher education reports, trends and webinars, to a global readership of higher education experts and professionals worldwide.

This report was produced by

About QS

Established in 1990, QS is dedicated to providing independent and authoritative research and resources for both prospective students and higher education providers worldwide. The QS World University Rankings®, published annually since 2004 and hosted on student-focused platform TopUniversities.com, is among the most-consulted resources in the sector.

In response to growing public demand for comparative data on universities and other higher education providers, and for institutions to develop deeper insight into their competitive environment, the QS Intelligence Unit was formed in 2008. Committed to the key values of rigorous integrity, undeniable value, unique insight and charismatic presentation, QSIU strives to be the most trusted independent source of global intelligence on the higher education sector.

In addition to the research and insights provided by QSIU, the company offers a range of services to help prospective international students find the right institution – and vice versa. This includes a global series of higher education fairs; an annual publication cycle of guides, reports and e-papers; and a dynamic range of online platforms.