

2013 E-Expectations Report

The Impact of Mobile Browsing on the College Search Process

The explosion of smartphones and tablets has given consumers access to the Internet from nearly any location. These devices have grown exponentially in popularity—smartphones overtook traditional “feature phone” sales for the first time in 2013.¹ Teenagers have been one of the primary drivers of this growth, with some reports stating that 48 percent of teenagers own an iPhone.² How has this growth in mobile usage affected the college search process?

Noel-Levitz, OmniUpdate, CollegeWeekLive, and NRCCUA examined that question in this year’s E-Expectations study. Participants were asked about their mobile browsing behavior—how frequently they use their phones to go online, their content priorities, and how often they check e-mail on their phones—to see if mobile browsing has significantly impacted the college search process. The report also queried them on e-mail usage, the influence of Web sites on their perception of a campus, and their social media use. Among the findings:

- 78 percent of respondents have regular access to a mobile device; 80 percent of those devices are a smartphone, tablet, or iPod Touch.
- 43 percent of students reported using their mobile devices for all of their Web browsing.
- 82 percent said they preferred to look at college Web sites on a PC/laptop instead of a mobile device. However, 68 percent said they have viewed college Web sites on a mobile device.
- 73 percent of students expressed interest in downloading campus-specific applications for schools on their target list.
- 47 percent check e-mail on their mobile devices daily; 67 percent check at least once per week.
- 98 percent of students would open an e-mail from a college they were interested in attending.
- 67 percent of respondents use Facebook, compared to 79 percent of respondents in the 2012 E-Expectations study.

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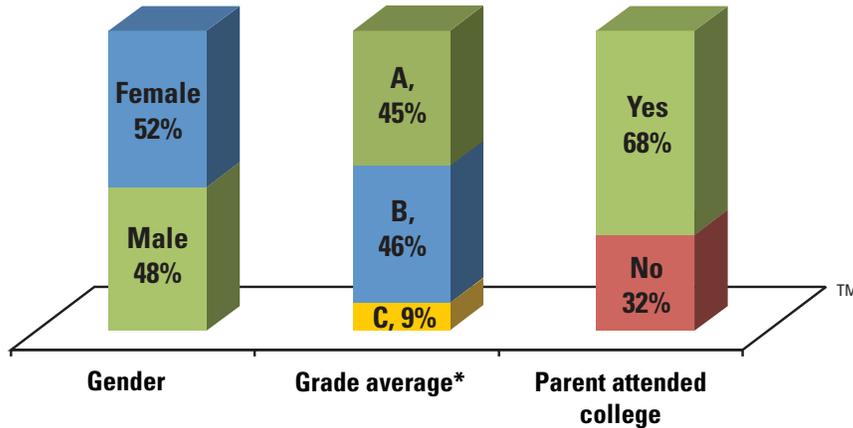
About the participants

The findings in this report are based on a spring 2013 phone survey of 2,018 college-bound high school juniors and seniors, with 25 percent each residing in the Northeast, Midwest, South, and West regions of the United States. The respondents were predominantly A- and B-students with a greater inclination toward attending four-year colleges and universities. One-third were the first to attend college in their families.



Note: Due to rounding, some percentages in the figures may not add to 100 percent.

Figure 1: About the respondents



*1 percent of respondents reported a grade average below C.

Figure 2: Ethnicity

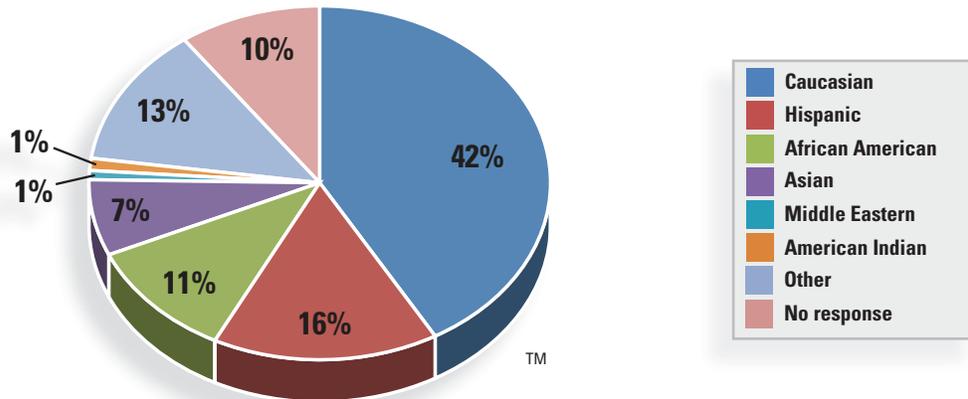
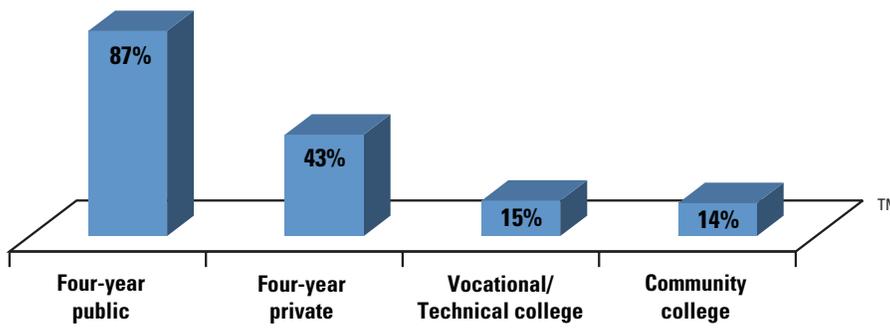
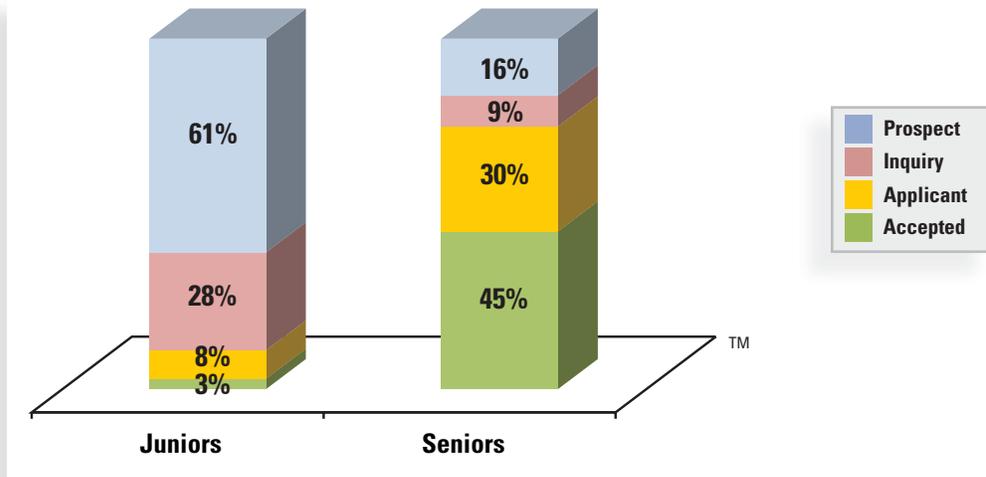


Figure 3: Type of institution interested in attending



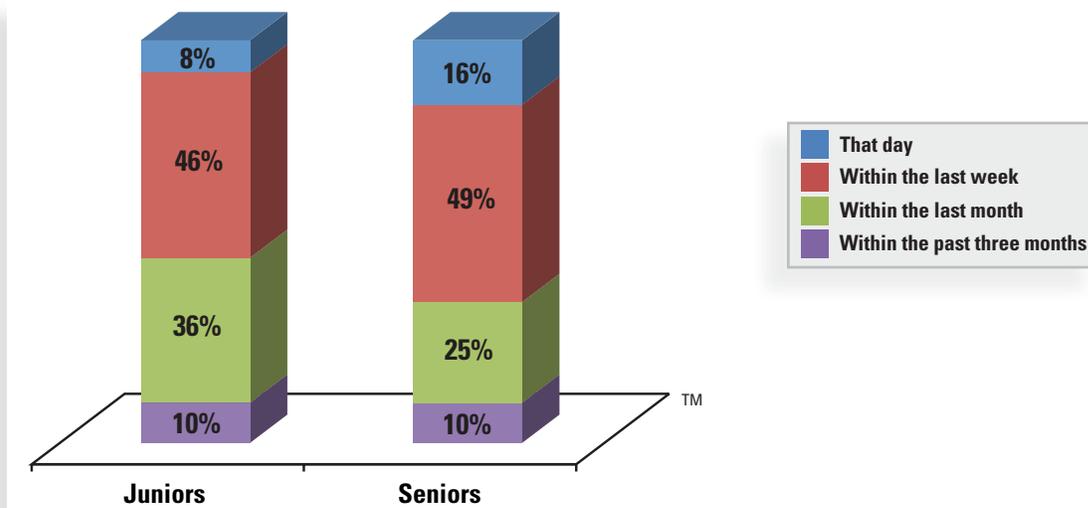
Juniors were more likely to be in the early stages of the enrollment process, while three-quarters of seniors had already applied or been accepted.

Figure 4: Funnel stage



Most respondents also visit college Web sites on a regular basis, with seniors visiting more frequently than juniors. At the time of the survey, 65 percent of senior respondents said they visited a college Web site within the past week, with 16 percent replying that they had visited a site that very day. For juniors, 54 percent had visited a site that week and 8 percent on that day. Nine out of ten respondents in both classes visited college Web sites within the past month.

Figure 5: When was the last time students visited a college Web site?



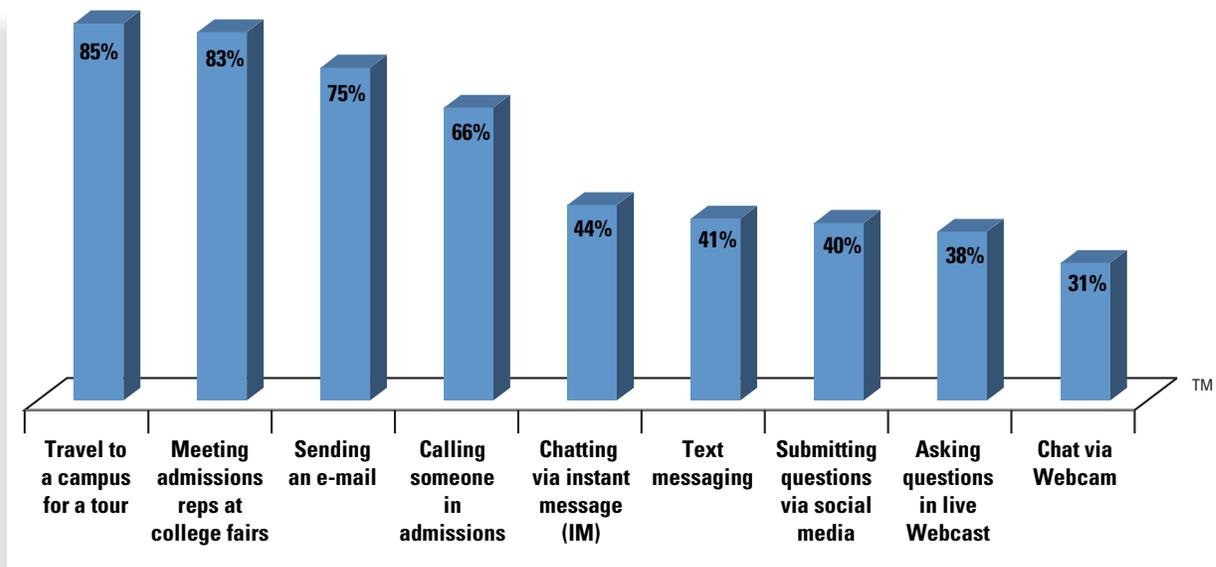
Influences and preferences during the enrollment process

About the ratings

For Figures 6-8 and Figure 12, respondents rated each item on a five-point scale, with five being the highest rating (most influential or most preferred). The percentages in the chart are the number of respondents who gave each item a four or five.

When asked about their interest in using resources to contact or connect with a college, the vast majority of students expressed a desire for in-person options. Students also showed strong interest in e-mail and contacting admissions personnel by phone.

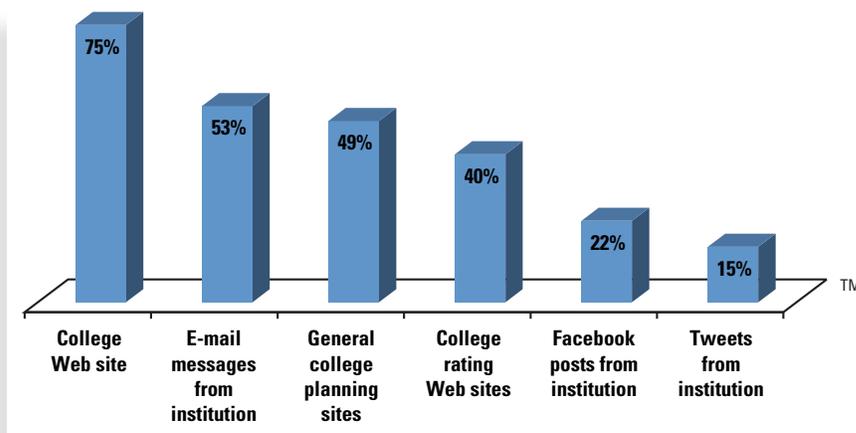
Figure 6: How many students are interested in using the following resources?



Seniors in particular were interested in contacting the admissions office by phone, with 70 percent indicating an interest in that option compared to 60 percent of juniors. It is also interesting to see that chatting via Webcam was not higher when the results for campus tours and college fairs show an interest in face-to-face interactions. This is an area campuses may want to explore as an option for students who cannot make a visit to campus before enrolling.

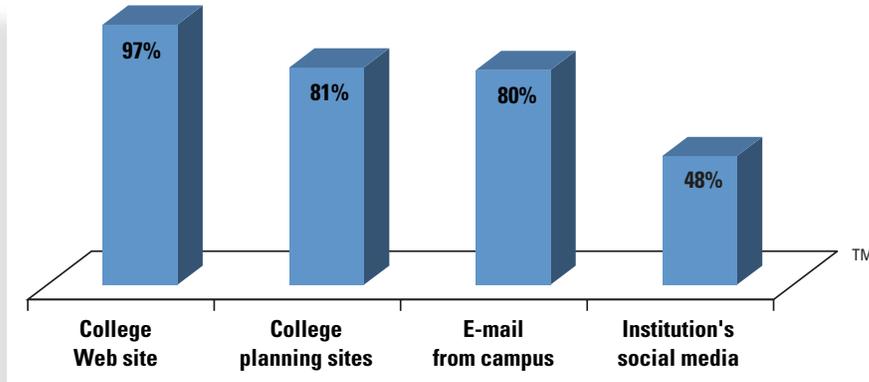
Respondents also rated resources used for researching colleges for their *influence* on the enrollment decision and for the *reliability of information* available from each source.

Figure 7: How many students cite the following resources as influential?



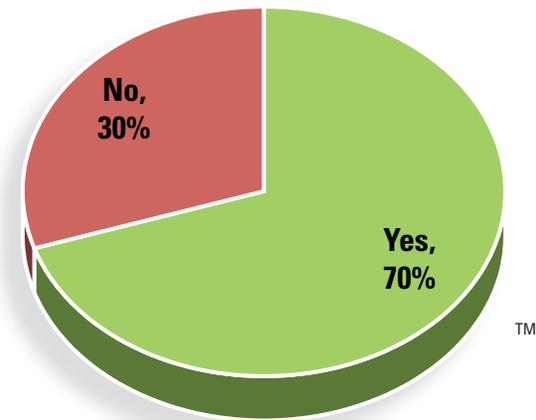
For general college planning sites, 54 percent of juniors rated them as influential compared to 45 percent of seniors.

Figure 8: How many students find reliable information on the following resources?



Students not only cited college Web sites as an influential and reliable resource, but also said that they influence their perception of an institution.

Figure 9: Does an institution's Web site affect the perception of a college?



About one-third of students also said they clicked on an ad for a campus during a Web search or from a social media page.

Figure 10: Have students clicked on an online ad for a college?

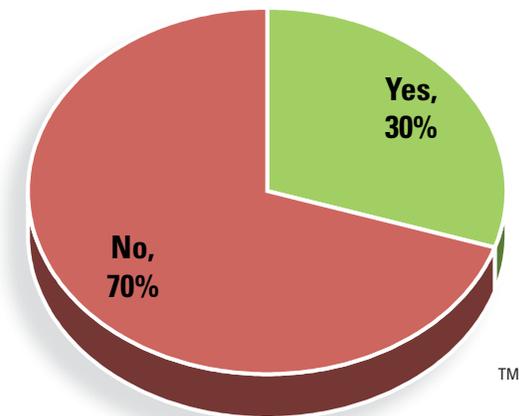
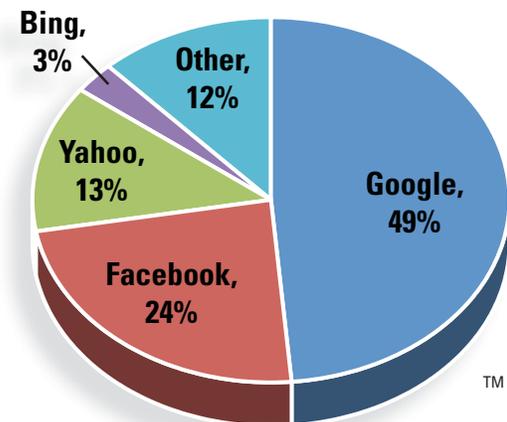


Figure 11: Where did they click the ad?

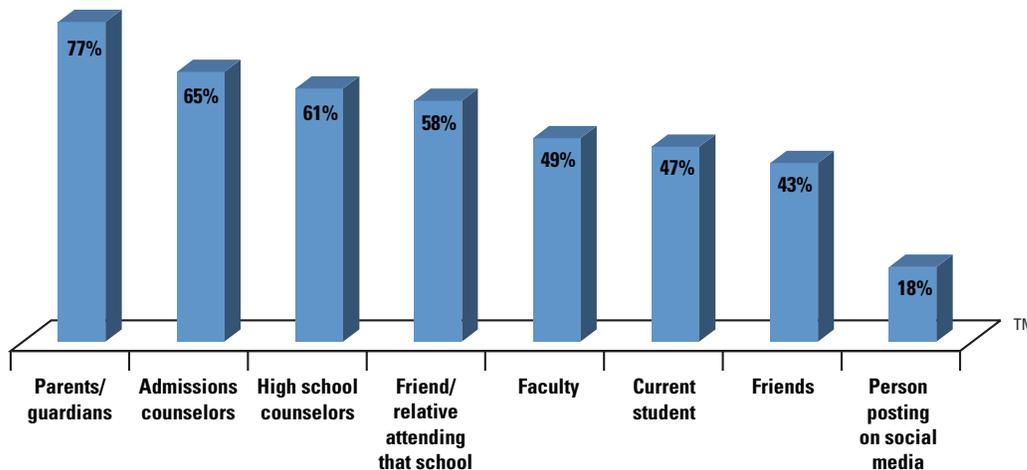


Recommendation: Make relevant, well-organized Web site content the central pillar of your e-recruitment strategy

Although other results in the following pages will show that students rely on a variety of resources for researching colleges, Figures 6–8 reinforce how crucial college Web sites are to prospective students. Your site will be one of the first places, if not the first, where prospective students will turn in order to learn about your institution. Be prepared by offering fresh content that is logically organized and that makes a persuasive case for your offerings and campus culture. Make sure you have sound strategies and a mechanism for updating and managing your site’s content, too, so that prospective students do not encounter outdated or inaccurate information.

Respondents also rated the influence people can have on their enrollment decisions.

Figure 12: Who influences the enrollment decisions of students?



Not only did a large majority of students rate their parents or guardians as influential, but campus high school counselors and friends or relatives attending that campus scored highly as well. Nearly half of respondents also noted faculty had influence over their enrollment decisions.

Recommendation: Communicate with the influencers of students

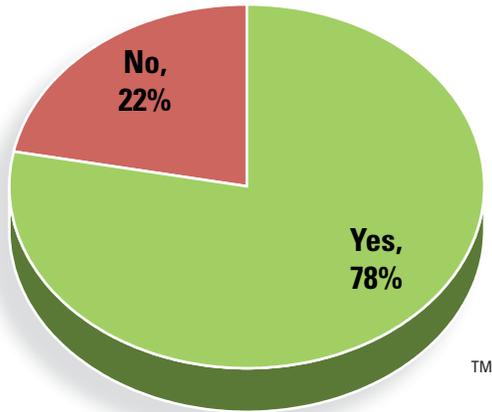
Figure 12 shows that, for nearly half of all students, a range of people in their lives can impact their enrollment decisions. Engaging family, friends, and high school counselors, or using faculty and students on your campus, can give your existing recruitment strategies a boost. Consider adding Web content and communication streams for parents, high school counselors, and other key influencers on a student’s enrollment decision.

Mobile devices and the college search process

The results in Figures 6-8 show how much students rely on campus Web sites and other online resources in making their college decisions. At the same time, more high school students are going online with mobile devices—in fact, many browse exclusively with their mobile devices. How has this shift affected the college search process?

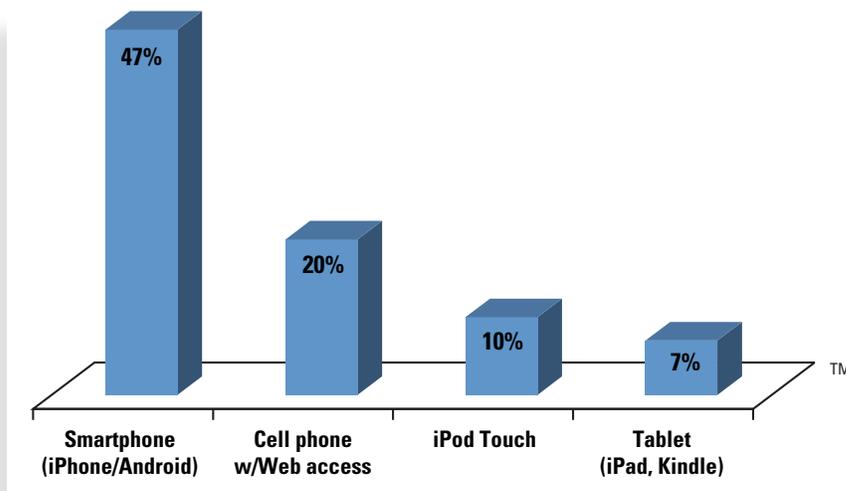
First, the vast majority of respondents reported having access to mobile devices.

Figure 13: Do students have regular access to a mobile device?



These figures match findings of the Pew Internet project, which reported that 78 percent of teens aged 14 to 17 owned a cell phone.³ Among those students with mobile access, most use some type of smartphone, tablet, or other touch-based mobile device.

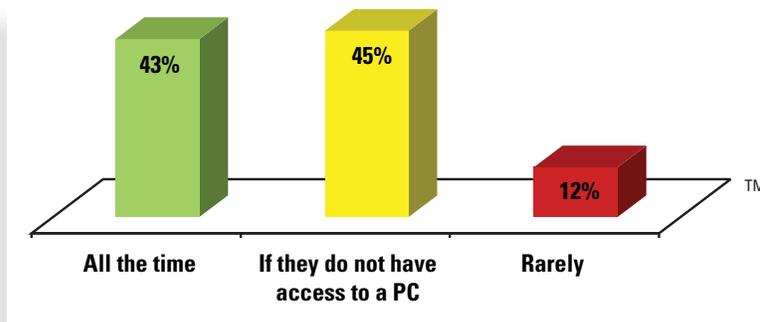
Figure 14: What type of mobile devices do they use?



The E-Expectations group's use of smartphones is in line with the Pew study of teenagers and technology, where 37 percent of 14- to 17-year-olds said they owned smartphones.⁴

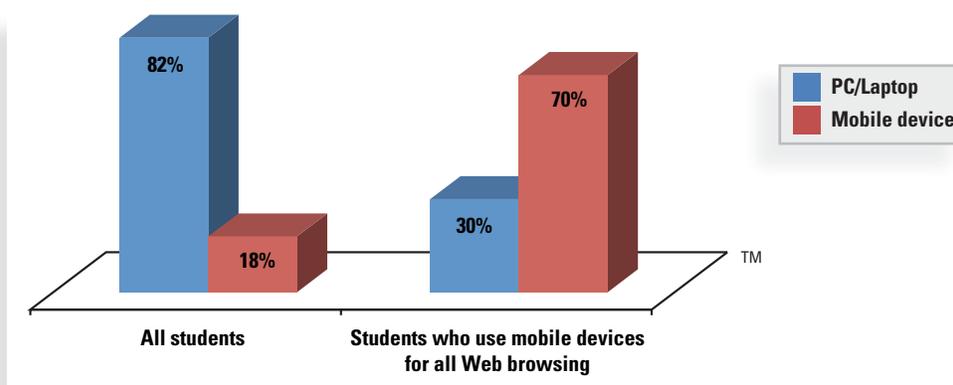
More importantly, four in ten respondents said they use their mobile devices for all or nearly all of their online browsing; only approximately one in ten generally avoid Web browsing with their mobile devices.

Figure 15: How frequently do they use mobile devices for Web browsing?



When it comes to researching colleges, however, respondents overwhelmingly preferred using a PC or laptop over a mobile device.

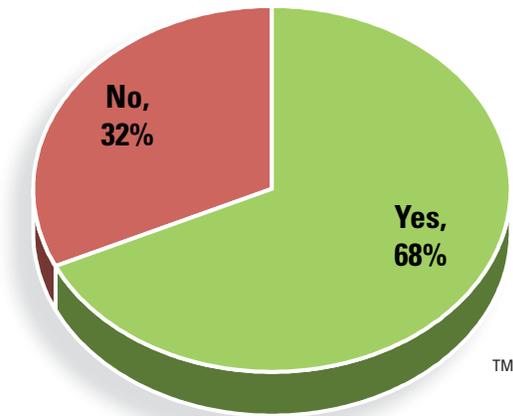
Figure 16: How do students prefer to view college Web sites?



Not only did eight of ten respondents express a preference for using a PC or laptop to view college Web sites, but nearly one third of respondents who browsed exclusively using mobile devices also preferred looking at college Web sites on PCs or laptops.

The important aspect to note is that students cited a *preference* for looking at college sites on a PC or laptop. As the next figure illustrates, while students may state a preference for using traditional desktop or laptop machines to browse college sites, most do visit college Web sites on their mobile devices.

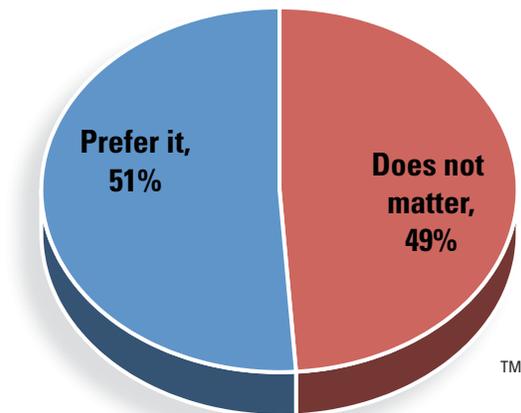
Figure 17: Have students looked at a college Web site on a mobile device?



In addition, 47 percent of those who viewed campus sites on their mobile devices also reported doing so within the previous week at the time of the survey. This further suggests that while students may prefer to use PCs to visit college sites, many are viewing college Web sites regularly via mobile devices.

What about optimizing the mobile experience? According to a recent survey of 174 campus Web and marketing professionals, 68 percent of respondents said their campuses had a solution in place for mobile users—51 percent had adaptive sites, 45 percent mobile sites, and 31 percent offered an app.⁵ Is that optimization important to students? According to many E-Expectations respondents, yes. Half of them said they preferred to have college sites adapt to their mobile display.

Figure 18: How do they feel about college Web sites adapting to a mobile display?



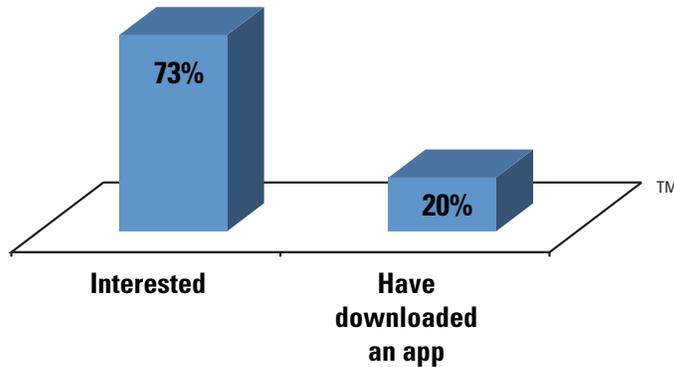
Keep in mind that 90 percent of the respondents in the E-Expectations group reported using smaller displays—smartphones, Web-enabled cell phones, and the iPod touch—to go online via mobile. Even with tablets growing in popularity among teens, smartphone-sized devices are used more frequently by students to view college sites. This makes the issue of adapting content to the display size that much more relevant to the mobile browsing of students during the college search process.

Recommendation: Provide a Web experience that serves PC and mobile visitors

Growing numbers of students may be relying on mobile devices for most or all of their Web browsing, but when researching colleges, it is likely many will be using PCs or laptops, too. With nearly 70 percent of respondents saying that they have visited college Web sites on a mobile device, it also means that campuses that have not already instituted Web strategies for mobile users should do so as quickly as possible. Mobile use will almost certainly rise in the coming years.

Campus-specific applications are another way for institutions to optimize the browsing experience for mobile users. Respondents showed great interest in these apps, but only one-fifth said they had downloaded such an app.

Figure 19: Are students interested in mobile apps for a specific institution?



As the table below shows, campus-specific applications drew high interest when students were asked about applications for the search process. An app allowing students to “complete enrollment at a specific school” also polled highly.

Figure 20: Top five mobile applications students would like for their college searches

Application	Would like
Helps students look at school choices and matches them to best options	84%
Helps students explore general scholarship options	80%
An application for a specific school	73%
Complete enrollment at a specific school	71%
Participate in live chats or online events with multiple schools	37%

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Recommendation: Consider offering students a mobile app for your campus

Many campuses have already taken steps to offer a dedicated mobile site or an adaptive main site—a best practice all institutions should follow. A campus-specific mobile application offers an even greater opportunity to not only optimize the mobile experience for visitors, but brand your campus and gather information from students who download it. An application that helps students complete their enrollment could be well worth the investment, either by developing one in-house or working with an app developer.

After mobile users arrive at your site, what do they want to view? First, students were asked to rank their top content priority when visiting a college Web site on a mobile device. In this instance, juniors and seniors had several different priorities among the top ten responses.

Figure 21: Top 10 content priorities for juniors and seniors browsing college sites via mobile devices

Juniors		Seniors	
Academic programs/majors listing	73%	Orientation details	67%
Academic programs/majors details	46%	Academic programs/majors listing	61%
Directory/contact list	46%	Applications	48%
Enrollment/admissions information	42%	Enrollment/admissions information	43%
Orientation details	38%	Academic programs/majors details	39%
Links to social media	33%	Cost	39%
Financial aid	32%	Financial aid	38%
Cost	31%	Course catalogs	31%
Scholarships	29%	Scholarships	30%
Search	30%	Athletic program	24%

TM

Notice that orientation details topped the list for seniors, which emphasizes a key point campuses often overlook: your site must serve students at *all* stages of the funnel. A student who has been accepted may still be coming back for more key information about enrolling. Make sure they can find that information so they can complete their enrollment.

Respondents also listed their top resources while viewing college sites on mobile devices. These responses had more uniformity between the two high school classes.

Figure 22: Top 10 most valuable mobile resources for juniors and seniors

Juniors		Seniors	
Cost or tuition details	82%	Cost or tuition details	81%
Scholarship opportunities	78%	Major/program listing	80%
Major/program listing	77%	Financial aid details	80%
Enrollment application	76%	Scholarship opportunities	79%
Enrollment/admissions information	75%	Enrollment/admissions information	79%
Details about the program	74%	Enrollment application	77%
Financial aid details	71%	Details about the program	74%
Tuition or scholarship calculators	66%	Course catalogs	61%
Course catalogs	60%	Search	60%
Search	58%	Tuition or scholarship calculators	59%

TM

On both lists, the large interest in information about academic listings further points to students being more willing to conduct research on mobile devices even if most expressed a preference for PCs and laptops (see Figure 15). The same also holds true for details on cost and financial aid.

Students showed willingness to submit a number of forms when browsing on their mobile devices, with many saying they had already completed forms on their mobile devices.

Figure 23: Which forms will students complete on a mobile device?

Type of form	Have completed	Would complete	Would not complete
Request information	49%	59%	41%
Calculate scholarships	46%	62%	38%
Schedule visit	44%	67%	34%
Calculate cost	41%	67%	33%
Open house registration	—	67%	31%
Register for class	—	62%	40%
Apply online	—	50%	50%
Register for live chat	—	43%	57%

TM

Recommendation: Invite interaction with mobile users by letting them do more than request information

Offering mobile users a chance to request information is a very obvious opportunity all campus mobile sites should include. But what about allowing students to calculate potential scholarships or request a campus visit while browsing on their phones and tablets? These activities can engage students and encourage them to submit information that can help you maneuver them closer to enrollment. The opportunity to calculate cost and scholarships in particular seems like an ideal experience for the mobile user—who may be in a position to show the results to a parent or guardian nearby. Offering mobile application submissions can also provide a key opportunity to a prospective student who is ready to apply immediately, without having to switch browsing platforms.

Communication resources and preferences

Has the rise of mobile changed student preferences regarding traditional communications over electronic communications?

When it comes to college choice, respondents were split almost evenly in their preference for colleges that use print and phone calls and those that rely on electronic and social media communication streams.

Figure 24: Which type of campus are students more likely to consider?

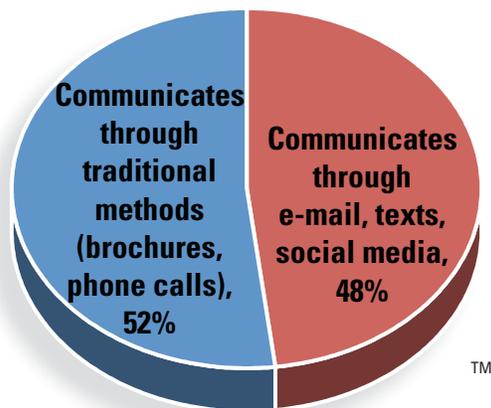
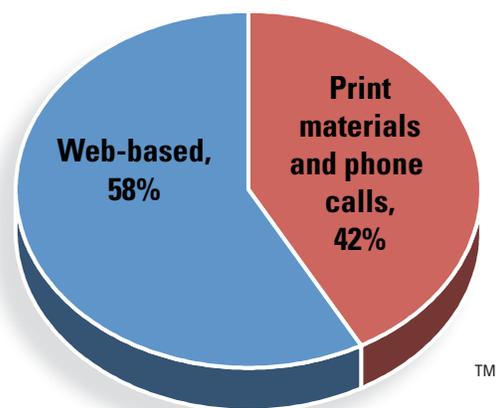


Figure 25: What types of resources do students prefer for learning about colleges?



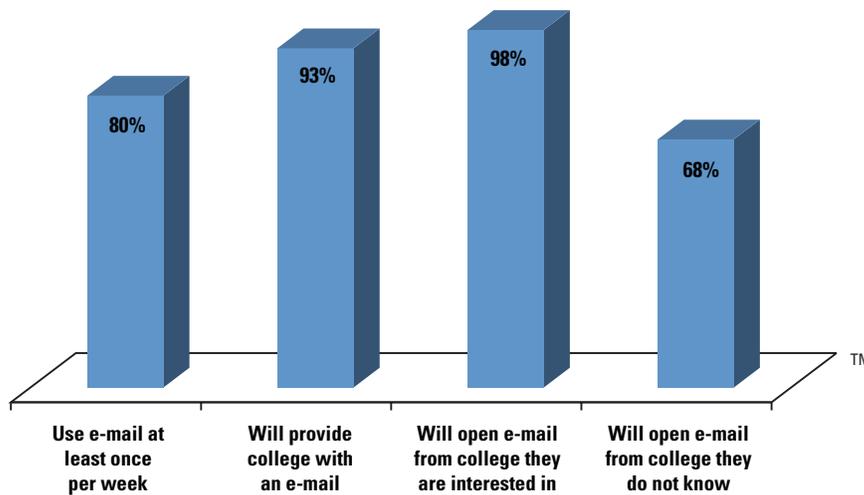
The response to the question in Figure 25 makes the preference for Web-based resources more clear, but interestingly, this figure is almost identical to a similar question posed in the first E-Expectations report in 2005. In that report, 56 percent said they would rather look at a Web site than read brochures in the mail, while 44 percent expressed a preference for print brochures.⁶

Recommendation: Maintain a balanced portfolio of traditional and electronic communications

More students show a preference for electronic communications, but there are still a large number of students interested in print pieces, phone calls, and other traditional communications. Keep a well-rounded mix of communication options so you can meet the preferences of all students.

After Web sites, e-mail has been one of the most popular and reliable e-communication forms. Eighty percent of the students in this study said they checked their e-mail accounts at least once per week. More importantly, nearly all students said they would open an e-mail from a college they are interested in attending.

Figure 26: E-mail use among students



Two-thirds of students also said they checked their e-mail on their mobile devices at least once a week, with nearly half checking e-mail daily.

Figure 27: How often do they check e-mail on a mobile device?

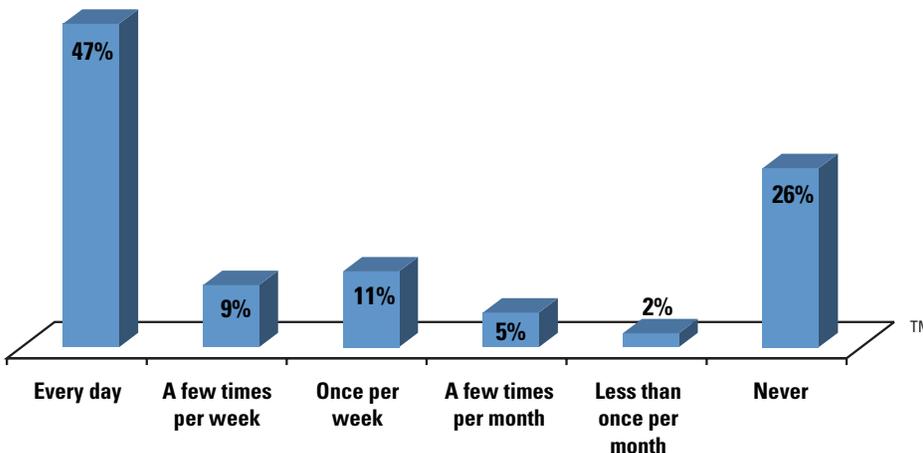
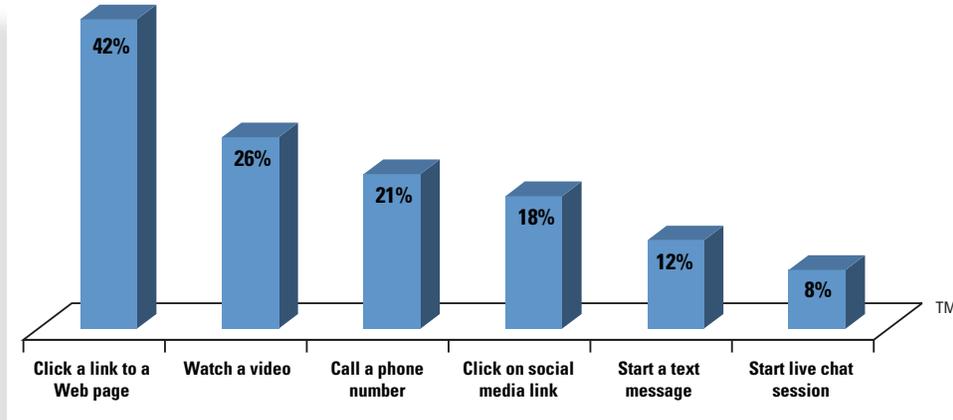


Figure 28: What are they willing to do when reading an e-mail on a mobile device?



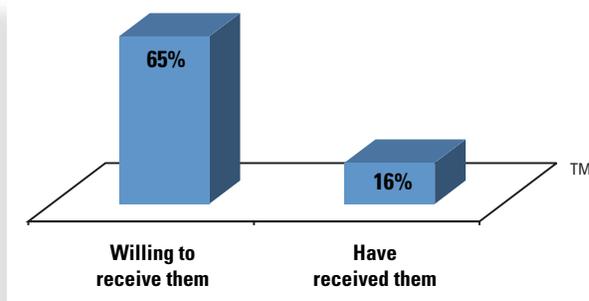
These results show that e-mail continues to be one of the best ways to communicate directly with students across PC and mobile platforms.

Recommendation: Design e-mails with smaller screens in mind

Students checking e-mail on a smartphone are not going to read them the same way they will on a full-size PC or laptop screen. Your e-mail messages need to adapt to this reality. Economize your e-mail copy as much as possible so mobile users won't have to scroll through long lines of text. Create designs that, while attractive, maximize the screen space of smaller displays. Move calls to action up so they display before the fold or on the first scroll of a mobile display, and repeat the request at the end.

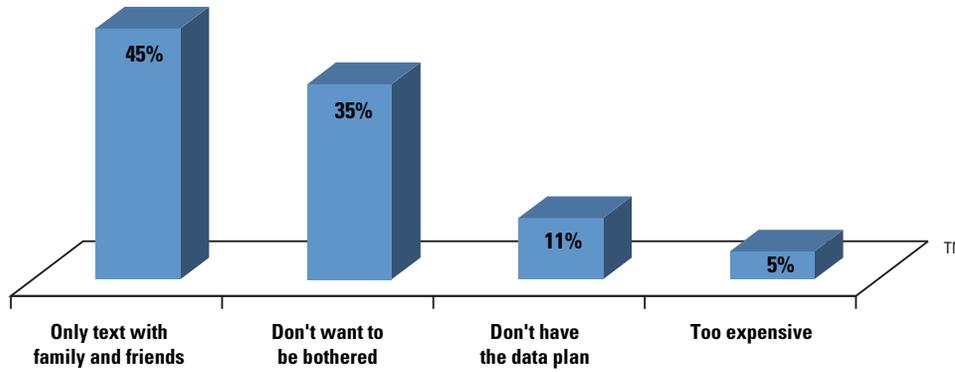
Growth in mobile usage also opens up opportunities for text messaging. Students appear to be willing to receive text messages from campuses, but few reported actually getting a text from an institution.

Figure 29: How do students feel about text messages from campuses?



Even more notable, 43 percent of those who received a text said they also replied to the message. Those who did not want to receive text messages cited reasons related to privacy or cost.

Figure 30: Why do students *not* want to receive text messages from campuses?

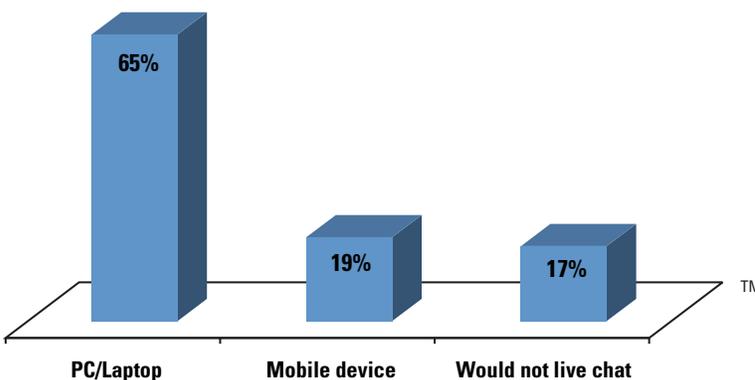


Recommendation: Give students the opportunity to opt-in to text messages when collecting cell phone numbers

With two-thirds of respondents willing to receive text messages, campuses should incorporate text messaging if at all possible. Text messages are perfect for a variety of quick, short messages—deadline reminders and event notices, for instance—and can also be used to solicit immediate responses from students. Ask students if they would like to receive these messages when they provide cell phone numbers on any contact forms. Be sure to make this a permissions-based contact, however, as students may react more strongly to an unwanted text than other forms of communication.

Many students also use mobile devices for live video chats. When asked about their preference for video chats, however, a large majority said they would rather use a PC or laptop.

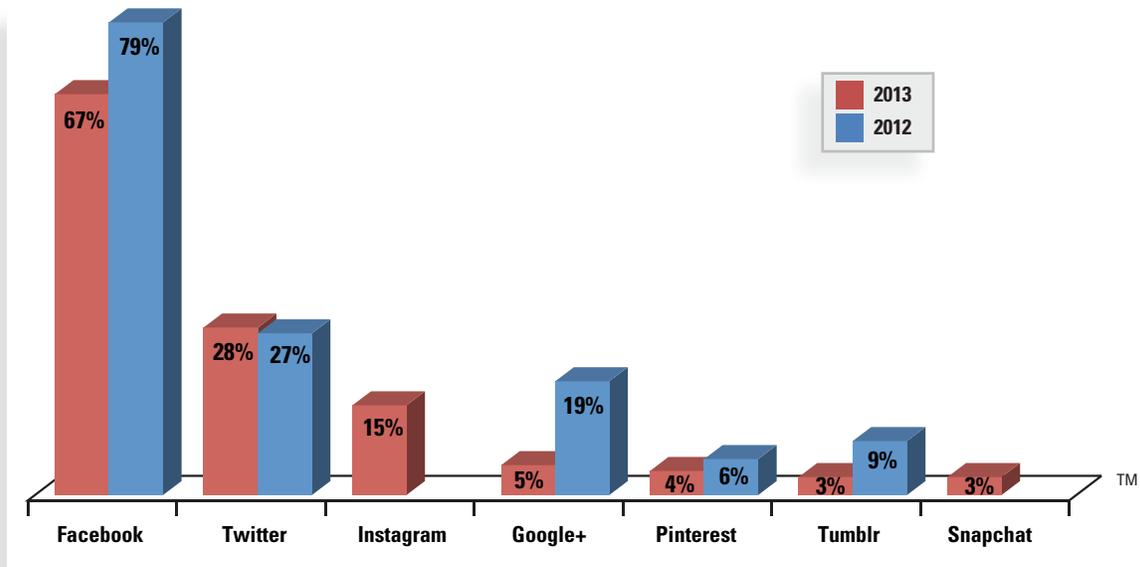
Figure 31: What device would students use during a live chat?



Significant declines in social media use

The E-Expectations project has documented social media use for several years. This year marked the first instance of a nearly across-the-board decline in social media usage compared to the previous year.

Figure 32: What social media sites do students use?

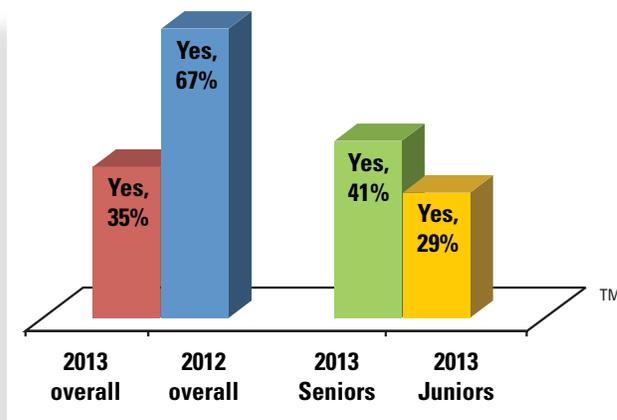


Note: Instagram and Snapchat usage was not captured in the 2012 E-Expectations study.

Only Twitter held steady with a 1 percent increase over the 2012 results. Google+ suffered a significant decline after fairly strong usage by students in 2012, and Tumblr surprisingly shrank as well. These usage patterns and their declines also match other studies of social media and teenagers.⁷

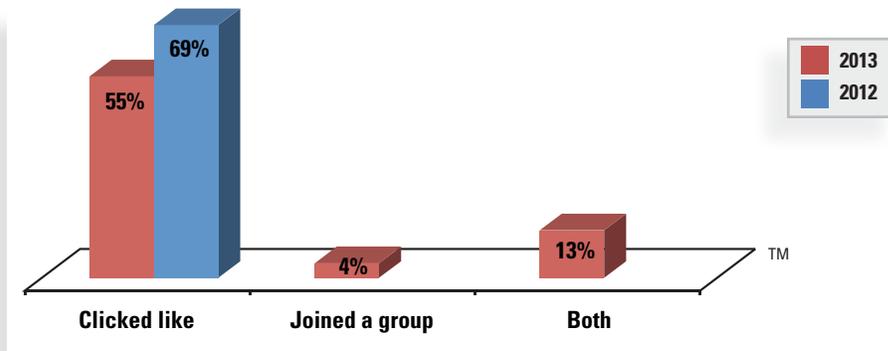
It's beyond the scope of this report to offer a reason for the decline, but the figures do reinforce the current supremacy of Facebook for .edu purposes compared to other social media resources. Unfortunately for campuses, it appears students are not only using Facebook less, but visiting campus-specific Facebook pages at a much lower rate. The rate was particularly low among juniors in the study.

Figure 33: Have students visited a Facebook page for a specific school?



Students who visited campus Facebook pages were also less inclined to “like” an institution’s Facebook page.

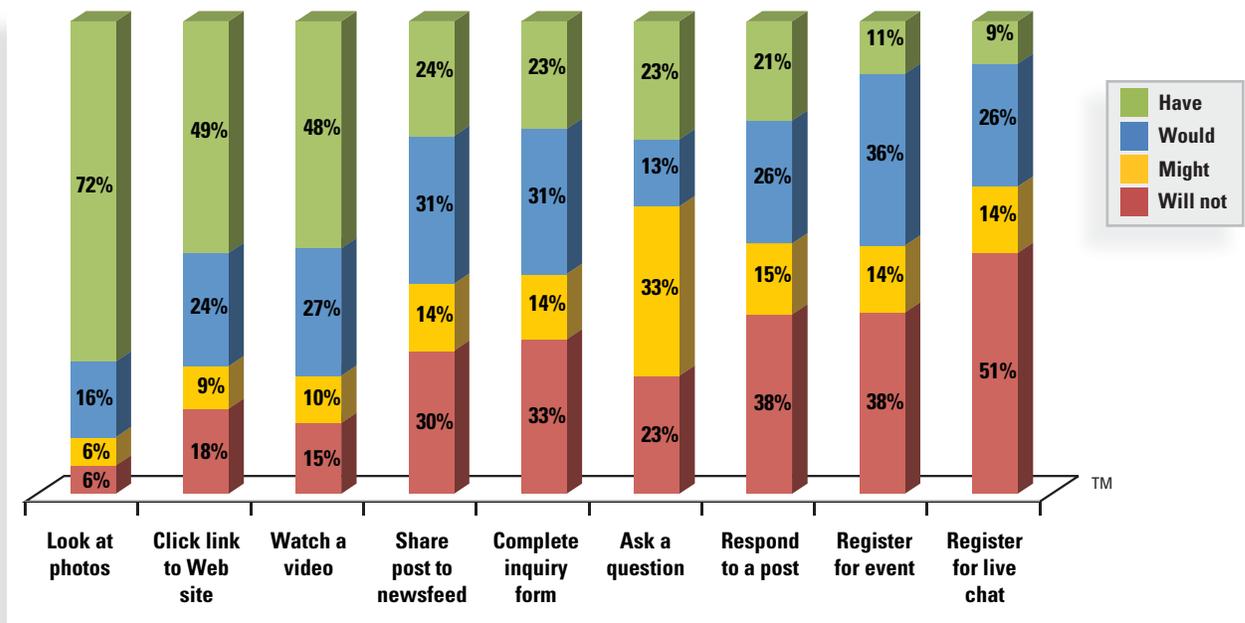
Figure 34: If they visited a campus Facebook page, what did they do?



Note: The 2012 E-Expectations report did not ask if students joined Facebook groups.

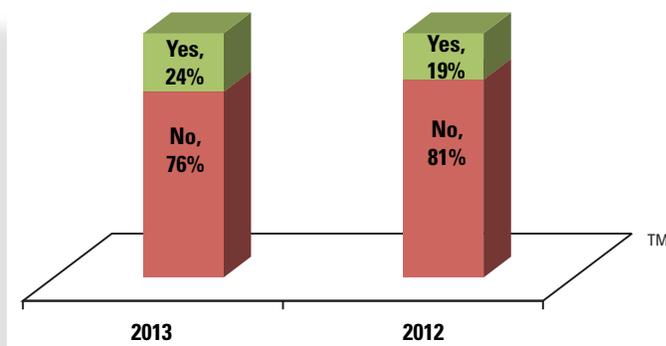
However, many respondents did report engaging in some sort of interaction on campus Facebook pages. Nearly three-quarters had looked at photos, while half had clicked on a link to a Web site or watched a video.

Figure 35: What are students interested in doing on a campus Facebook page?



Twitter was the one social media channel that had an increase over the 2012 E-Expectations results. Students were also more likely to follow a college feed than the previous year.

Figure 36: Do students who use Twitter follow college feeds?



Recommendation: Keep social media active while keeping it in perspective

Social media offers campuses unprecedented ways to connect with prospective students. At the same time, it has become increasingly clear that it has simply added more channels for communicating with students rather than replaced more tried-and-true methods such as e-mail. Keep sharing exciting and relevant interactive content on Facebook—and give students the opportunity and a reason to engage with your page. Twitter is also a very effective way to share information, especially if you can get prospective students to retweet content to their friends (keeping in mind the influence they have as evidenced in Figure 12). Just be sure to achieve the proper balance in relation to Web and e-mail content so that you do not put too many resources in social media instead of areas that are more popular and persuasive with prospective students.

Conclusions

These results show the growing popularity of mobile browsing among students, yet also show a continued reliance on PCs and laptops in the online college search process. Campuses at this point need to accommodate both types of visitors. At the same time, mobile browsing will increase in the coming years, especially as smartphones continue to outpace traditional cell phones. With that in mind, campuses should:

- **Optimize the mobile experience through adaptive design or through mobile sites.** If creating a mobile site, institutions need to make sure they address the top content needs of mobile users.
- **Design with smaller displays in mind.** Your Web pages, e-mails, and other electronic content will look appealing on smartphones.
- **Provide contact and other forms that are optimized for mobile users.** Many students browsing college sites via mobile are willing to submit forms on mobile devices, including net cost calculators and campus visit requests. Provide them with forms that function well on mobile screens.
- **Offer a mobile app for your campus.** Not only will this make it easier for mobile users to explore your campus, it will allow you to collect more information from potential students.
- **Get students to opt into as many communication streams as they want.** With so much willingness to open e-mails from campuses, receive texts, and download apps, campuses have more opportunities than ever to connect with students. Let them volunteer for those communications.
- **Put your best institutional face on your Web site.** Treat your Web site visitors like your on-campus visitors. Keep content fresh, make it clear where students should go, and make them want to come back. Strip away outdated content or inaccurate information to keep things clean and relevant.
- **Keep an eye on social media use, but keep using social media.** Social media site trends can change rapidly, so monitor what students are using as you allocate your resources for social media.
- **Never stop researching your visitors.** The E-Expectations study polls prospective students every year. Why? Because the preferences of today's high school students can change rapidly and turn conventional wisdom into outdated notions. Your campus should be continuously tracking visitors to your online presence. How many are on mobile platforms? Which pages do they visit? Which pages do they bounce away from? Analyze your audience and use that data to guide future plans and adapt to your visitors.

Questions about this report or optimal strategies for your Web communications?

We welcome your questions and comments about the E-Expectations study. We are also available to discuss your specific goals and challenges for your online communication initiatives. Send an e-mail to ContactUs@noellevitz.com or call 1-800-876-1117, and we will be happy to answer your questions.

About the survey sponsors

Noel-Levitz is a recognized leader in higher education consulting and research. For 40 years, they have partnered with more than 2,800 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.

Citations

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