



# The Maturation of Mobile and Social: *The 2017 Social Admissions Report*

By Gil Rogers, Director of Enrollment Marketing, Chegg  
& Brian Wm. Niles, Founder, TargetX

# INTRODUCTION

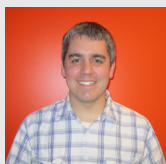
Since the early days of social media, college and university admissions and marketing professionals have seemingly clamored to find the “next big thing” to engage their prospective students. With the advent of continued algorithm tweaks, platforms rising and falling in popularity seemingly overnight, and the fragmentation of the tools and resources students use to find and share information, it can be ever more challenging to keep up.

While social media has matured, traditional methods of outreach such as e-mail and direct mail have continued to be a cornerstone of the college recruitment toolkit. The question has now become, “How do I continue to do more with less?”

This year’s social admissions report provides key updates in trends with respect to which platforms college-bound high school students use to find, compare, and evaluate colleges using digital, social, and mobile platforms. Additionally, we’ll dive deep into ways you might consider aligning digital marketing across social media and mobile with your traditional efforts to support conversion, yield, and ultimately, better tracking of ROI on your recruitment and marketing efforts.

Finally, we’ll explore how students leverage the multiple devices in their home and in their pockets to navigate the college search process across these various channels and provide key insights into how admissions and marketing professionals can connect the dots.

We appreciate you taking the time to read this report. If you have additional questions or feedback we’d love to hear it. Please drop us an e-mail using one (or both!) of our addresses below.



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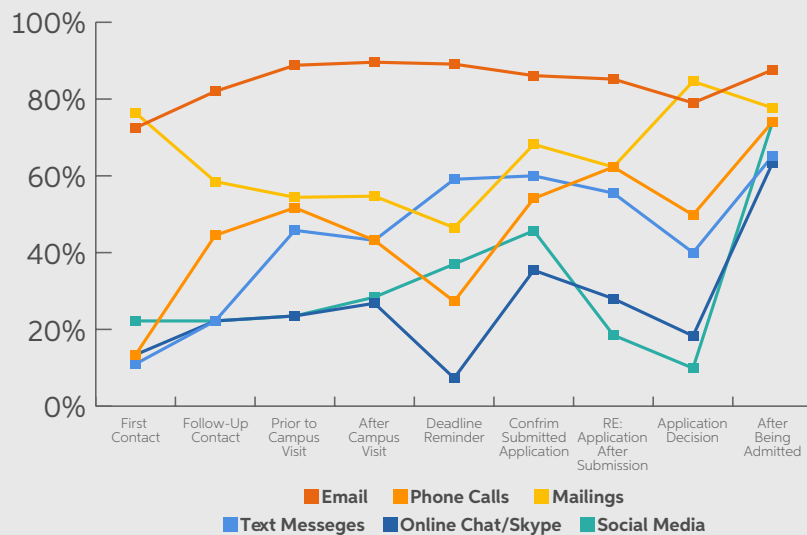
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# FORWARD: THE DIGITAL MARKETING LANDSCAPE

It's no secret that today's students are more connected than ever. This poses significant challenges to marketers that seek to not only reach but also influence the behavior of prospective students.

## Preferred Contact at Each Stage

Q: What are your preferred methods of being contacted by a school in these stages of the application process?

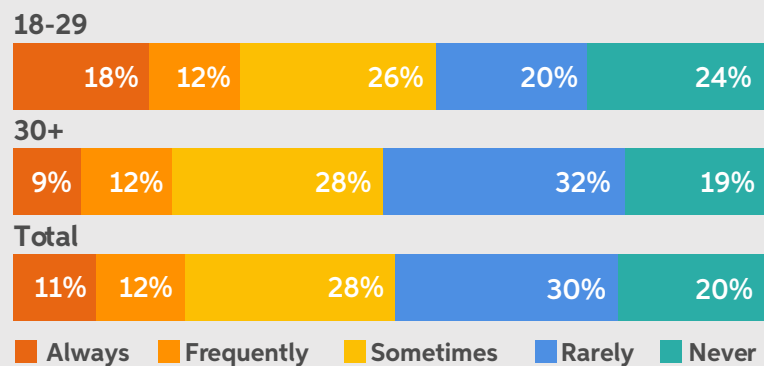


One of the workhorses of college admissions recruitment is e-mail. And, recent data shows that students do prefer this channel when speaking with colleges. In the 2016 TeensTALK® study conducted by Chegg and STAMATS<sup>(i)</sup>, over 70% of students indicated that they preferred e-mail at each phase of the process (from first contact through

their final decision), outpacing all other forms of communication (with the exception of print pieces still being most valued for admissions decisions).

## Frequency with Which US Email Users Open Marketing Emails, by Age, Oct 2016

% of respondents in each group

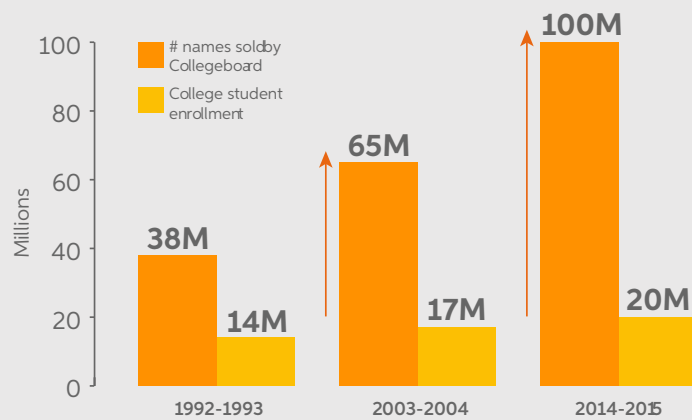


Note: numbers may not add up to 100% due to rounding  
 Source: Fluent LLC, "The Inbox Report 2016: Consumer Perceptions of Email," Nov 16, 2016

With that in mind, e-mail can also be "hit or miss" when it comes to reaching your desired recipient. Recent data from the Fluent LLC "Inbox Report"<sup>(ii)</sup> indicates that nearly half of millennials say they read less than half of the e-mails they receive from marketers. Additionally, fewer than one in four millennials always or frequently read e-mail from marketers.

One of the key drivers of access to student e-mail addresses is, of course, name buys (primarily from testing or survey services). At the 2015 National Association for College Admission Counseling Conference, College Board presented data<sup>(iii)</sup> indicating that for the timeframe of 2014-2015, over 100 million names had been sold to colleges and universities trying to recruit students. This is up from 65 million names 10 years prior. As you can see by the chart above, the volume (and access) to names is far outpacing college student enrollment. This indicates that more and more colleges are recruiting students in the same ways, adding to inbox clutter and compounding the impact of less-than-optimal read rates.

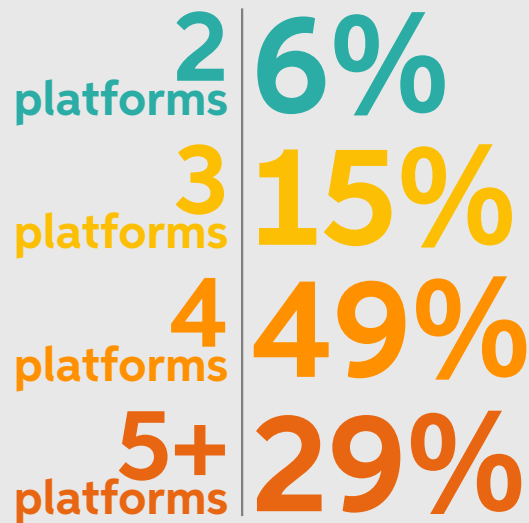
### Trends in Name Buys vs. College Student Enrollment



Source: Collegeboard.com, NACAC Conference, October 2015  
[http://nces.ed.gov/programs/digest/d14/tables/dt14\\_303.10.asp?referrer\\_report](http://nces.ed.gov/programs/digest/d14/tables/dt14_303.10.asp?referrer_report)

The final challenge added to the mix is that while students may be using their devices frequently, they are not necessarily glued to e-mail. Data from LaunchLeap<sup>(iv)</sup> indicates that nearly 8 in 10 millennial internet users are logging in to 4 or more digital platforms per day (including social networks like Facebook, news apps, and more).

### Number of Digital Platforms\* that US Millennial Internet Users Visit Daily, Dec 2016 % of respondents



Note: ages 18-35; numbers may not add up to 100% due to rounding; \*e.g., Facebook, news platforms, Twitter. Source: LaunchLeap, Dec 20, 2016

With competition for attention on the rise, college admissions and marketing professionals need to adapt to a reality that combines traditional outreach like e-mail with a firm understanding of where students are across the web as well as on their mobile devices. The data we extrapolate in The Social Admissions Report is meant to inform and guide us through today's current landscape and to help higher education professionals understand where, when, and how to find their prospects to support better enrollment marketing outcomes.

# THE CHANGING DIGITAL LANDSCAPE

## Where Are Students Starting Their Search?

For years, the college admissions process has been a “push marketing” environment. Colleges purchased their name lists, sent out their carefully crafted search pieces, and awaited responses.

Over time there have been incremental changes to this approach. Of course, e-mail has helped to accelerate the pace in which schools reach students. Additionally, predictive models and data analysis can help a college to segment and prioritize their lists to ensure they are investing the effort and resources in the places that matter most.

But, the most disruptive change of all has been the entry and proliferation of college search and review sites, which place the control and access to college information into the hands of the students themselves. While colleges and universities still have access to student data, the paradigm now shifts to how quickly a school acknowledges a student’s interest while engaging students across the various channels with which they access information.

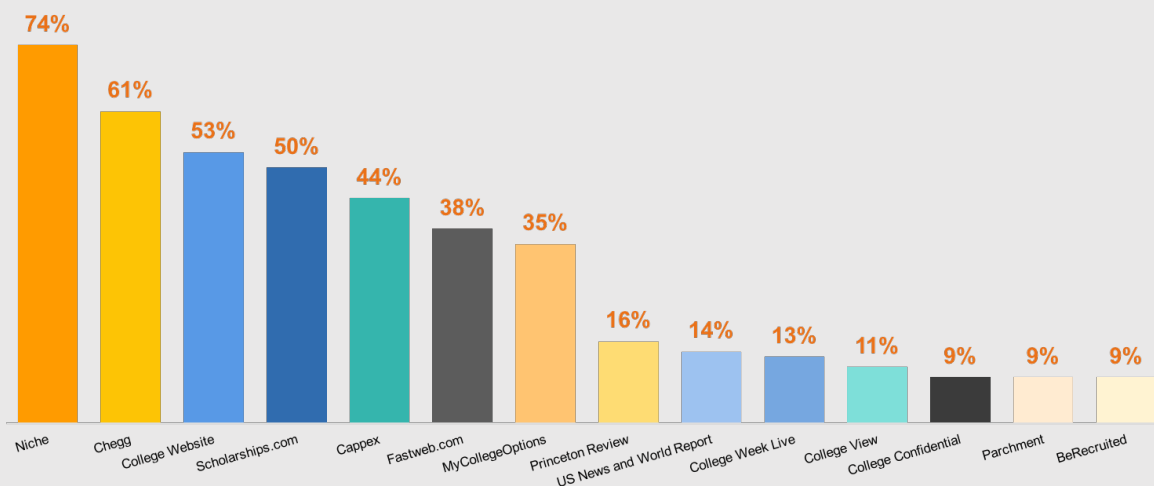
In our 2017 survey, 93% of students used at least one college search or review site during their college search. The challenge for digital marketers is determining which site or collections of sites are most used by students. Additionally, admissions and marketers need to determine how influential the information on these sites truly is.

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## How Students Research Colleges

Q: Which of the following online resources have you used to research colleges?

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When looking at the college search and review site landscape, it is easy to get overwhelmed. There are dozens of sites used for various purposes with no clear individual site that meets every student's needs. Some of these sites have large followings. **In our survey, nearly 3/4 students used Niche.com, with 2/3 students using Chegg.com, and over 1/3 of students using MyCollegeOptions.com.** There is also a healthy representation of smaller search sites that, when combined, represent a sizeable representation of the college search website landscape. Additionally, half of students use Scholarships.com and nearly 40% use Fastweb. This indicates that even scholarship search sites are somewhat fragmented.

This fragmentation is okay. If we think about college search sites like we do online social networks, we recognize that not all students like the user experience of Facebook and prefer Snapchat, while other students may prefer to post to Instagram over live tweeting their life.

The comparisons to social networks end when thinking about the place college search and review sites fit within the student experience.

## What Do Students Use Search & Review Sites For?

In the wake of the Great Recession in 2008, the importance of the availability of scholarships and financial aid has been a mainstay with respect to what students care about when researching schools. Recently the verbiage has changed to “outcomes”, which is another way of looking at what students would consider the ROI on their investment.

This concern is at the forefront, at the top of the funnel, when students are proactively researching schools. **Four out of 5 students use college search and review sites to research scholarship information**, while 2/3 focus on financial aid. One of the clear advantages of college review sites over a “.edu” is the ability to shop and compare. This includes cost of attendance, rankings, and availability of aid programs.

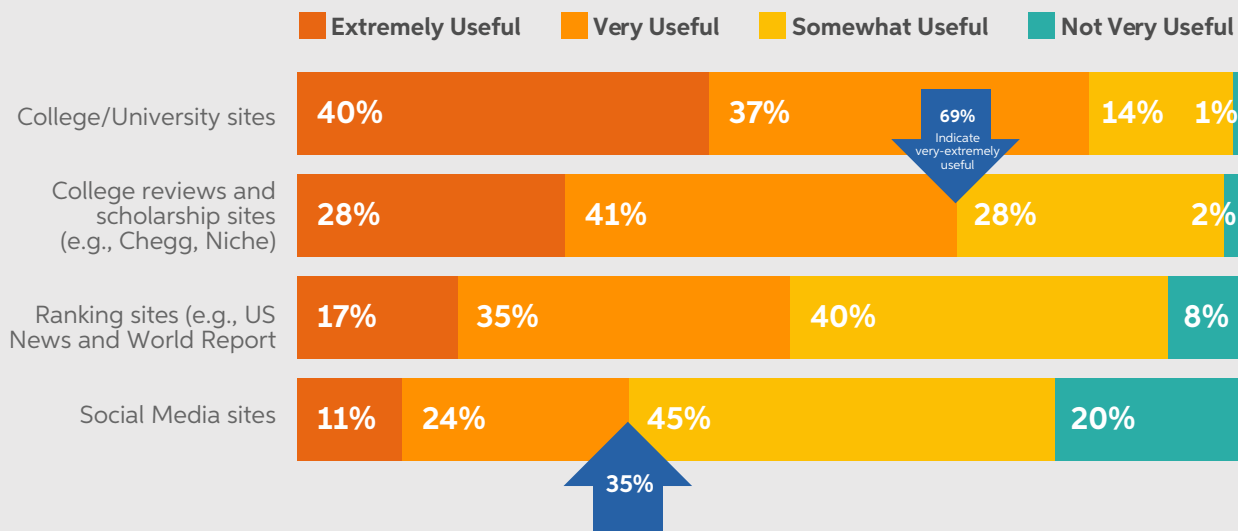
Additionally, **nearly 3/4 of students use college search and review sites for general admissions information**. This includes deadlines and admissions requirements. Many of these sites leverage publically available information when building their directories, which means it’s important that colleges and universities have strong alignment between the admissions, marketing, and institutional research departments to ensure the information being reported is accurate across the web.

## How Useful Are These Platforms?

Considering the size and scope of college search and review sites, it’s hard to debate their importance in the college search process. However, it’s also important to understand where they sit with respect to your overall recruitment and marketing priorities.

# Most Useful for College Research

College “.edu” is a marketing vehicle for prospective student outreach



How useful were the following types of sites during your college search?

While over 3/4 students rank the college website (your “.edu”) very to extremely useful throughout the college search process, college search and review sites don’t trail far behind. **Nearly 70% of students consider these platforms very to extremely useful.** Further, if we consider all channels of information at least “somewhat” useful, students rate college review sites and official college websites at the same level of importance.

When looking at other channels through this lens, particularly social media, it’s important to note that just over 1/3 of students consider social media as very to extremely useful when researching schools. While 1/3 is a large portion and cannot be ignored, in this context, it’s important to recognize that college review and help sites are more important at the top of the funnel than social media. This flips at the latter stages of the process when students are more influenced by their interactions with other students than they are shopping and comparing institutions side-by-side.

## **What Does This All Mean?**

It's important to recognize that while traditional recruitment methods may still have some impact when introducing your brand to prospective students, it's equally important to consider how you are connecting with the students proactively researching you across the web.

The reality is that while some students may reply affirmatively to your traditional search campaign, a healthy portion of those students may take your brochure and research you online before responding. Both the responder through traditional methods and the responder through college search sites has an equal level of importance to your strategic priorities.

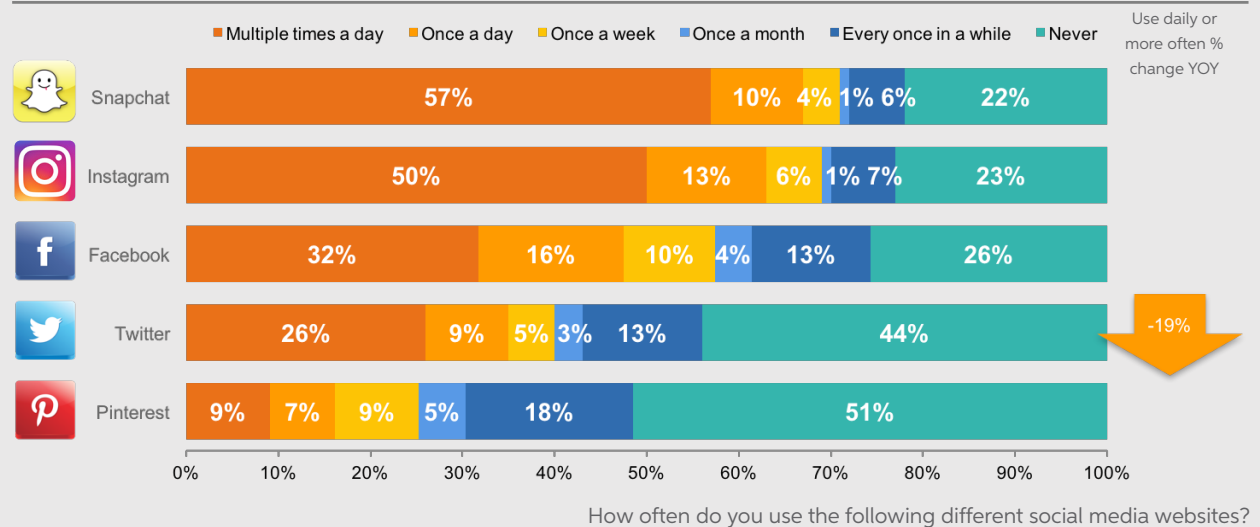
# A Mature Social Media Market

## Recognizing the Difference Between “Active” and “Active for College Information”

One of the most important considerations we can make as enrollment marketers trying to reach students on social media is that there is a difference between where students are active online to connect with family and friends versus places to consume media and news information. This means that marketers don’t need to focus on being “everywhere” (as this is not sustainable from a time and resources perspective), but rather should focus on being effective in the places where they can make the most impact.

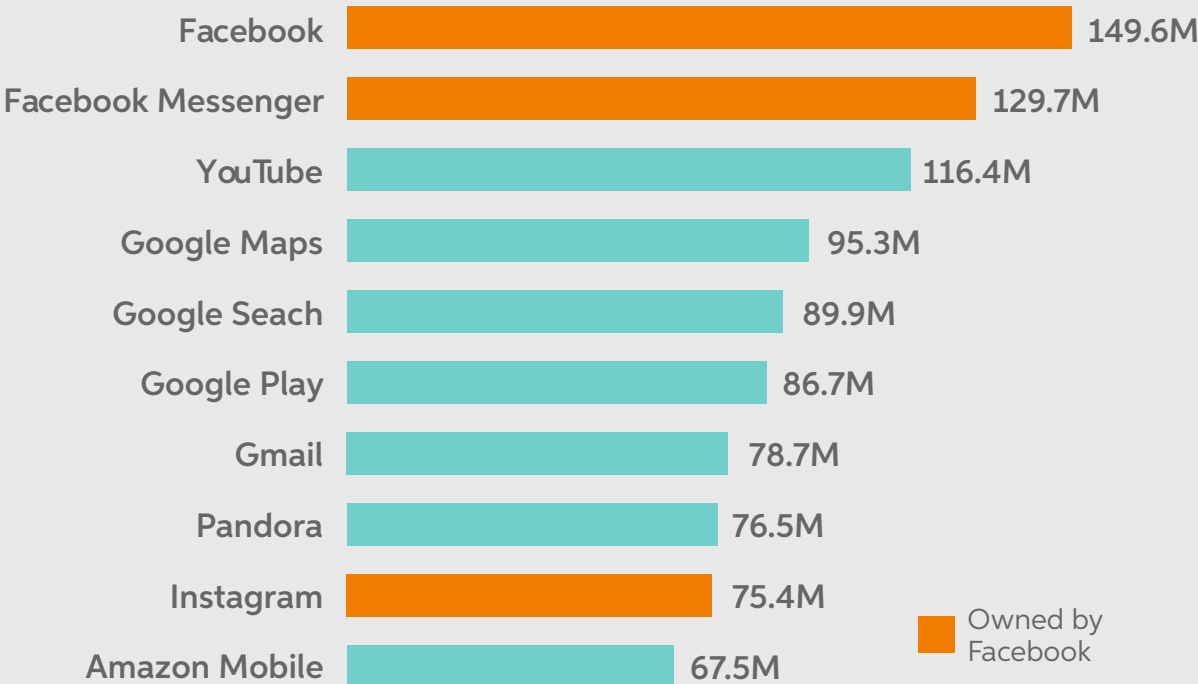
First, let’s look at where students are on a day-to-day-basis.

## Frequency of Use: Overall



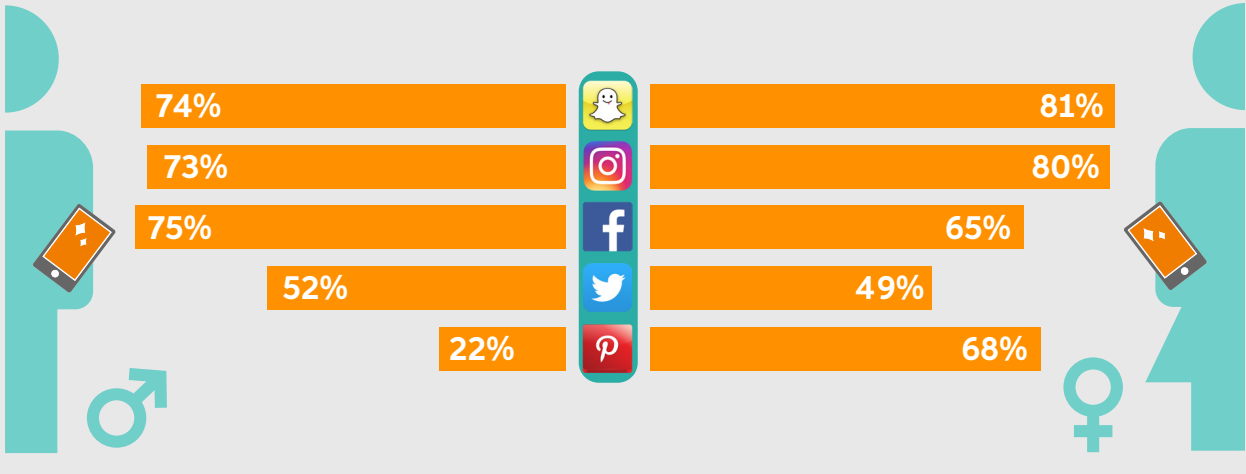
Over the last few years (our data goes back to 2013), there has been a steady decline in overall use of Facebook as a social network for students. This is paired with the proliferation and growth of various alternatives, including Instagram and Snapchat. Overall, visual and mobile-first platforms continue to grow. And while overall Facebook use may be on the decline, we must consider that over 7 in 10 students still have accounts and that Facebook owns Instagram. In fact, based on recent data from comScore<sup>(v)</sup>, three out of the top 10 most-trafficked apps installed by mobile phone users are owned by Facebook.

# Top 10 Mobile Apps by Unique Visitors



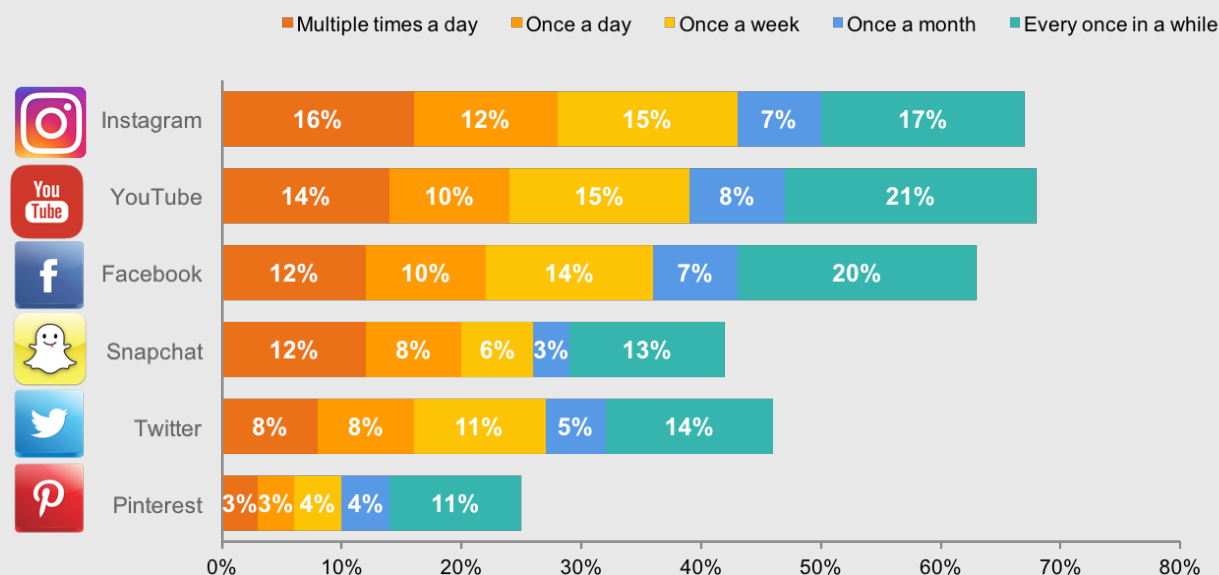
Data: 2016 Mobile App Report, comScore Mobile Metrix, U.S., Age 18+, June 2016

# Use of Social Platforms by Gender



Another important callout in this year’s data is the sharp decline in student use of Twitter. While Facebook’s decline has been gradual (13 percentage points spread over 3 years), Twitter has dropped off much faster by comparison (10 percentage points in 1 year). Once again, over half of students are still present on the platform, but this information should be used to help guide your overall priorities.

## Frequency of Use: COLLEGE SEARCH

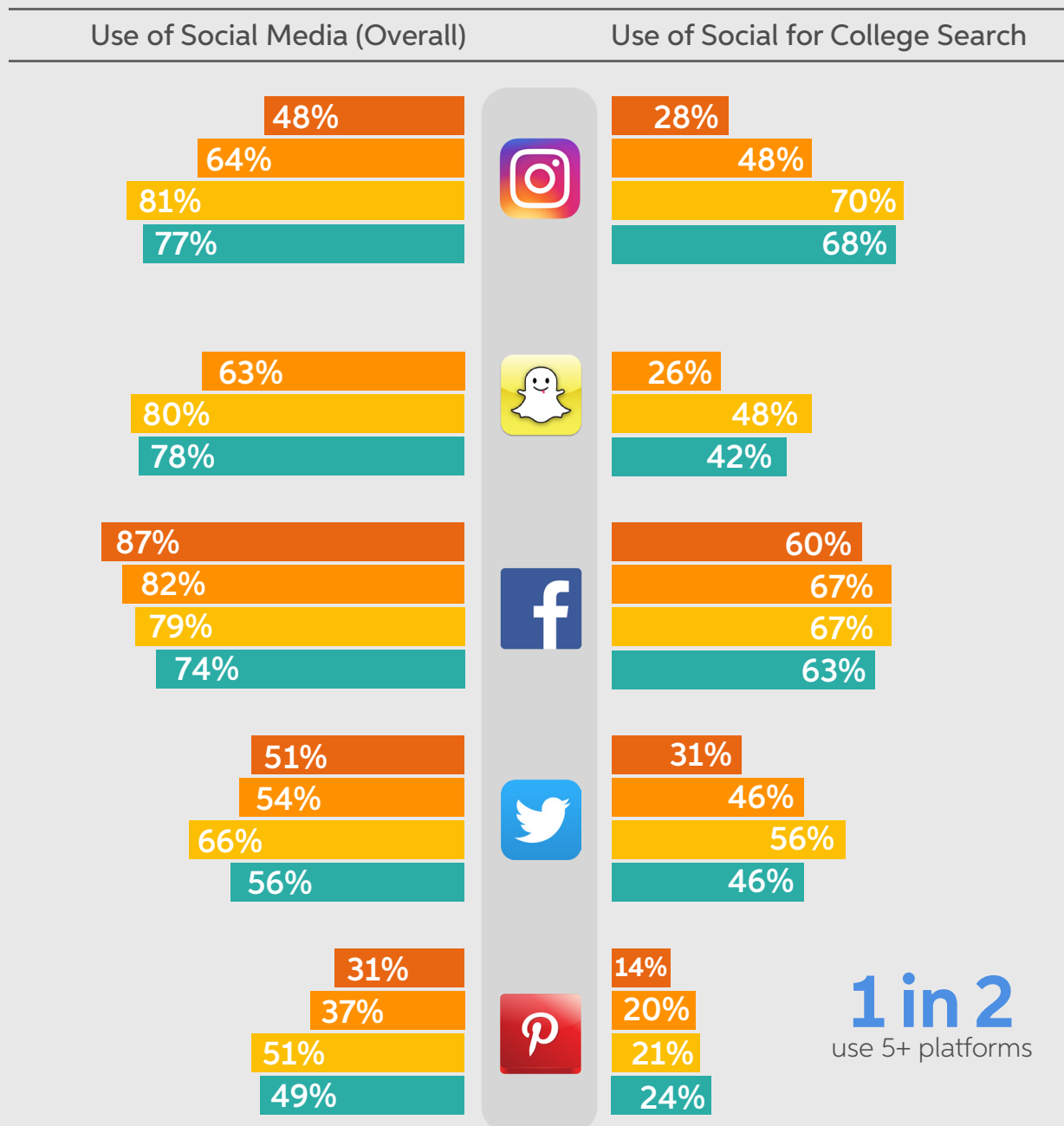


Author’s Note: Based on data from eMarketer<sup>(vi)</sup>, 7 in 10 internet users access YouTube regularly. Therefore, we do not ask about this usage in the chart on page 10. However, in the context of this research we are interested in how frequently students use YouTube when researching colleges and include it in the question addressing this use case.

Now, compare the overall use of social media for the college search and things begin to get interesting. The first point brings us to Facebook. While overall use of Facebook has steadily declined, the use of Facebook for college research has trended upward and stayed relatively steady over the same time period. This is one example of how you cannot assume that reaching students on their most “active” platforms will be the best place to reach them.

For the purposes of this study, we include YouTube as an option for students performing college research via social media. While we do not consider YouTube a “social network,” it is a strong enough visual platform that it warrants attention. We’ll discuss more when we dive into the overall activities students perform when researching schools on social channels.

Another important observation is that students using 5+ platforms to check out colleges. Social networks are fragmenting with respect to their influence on the college search, which could be influencing the slight dip across the board and potentially signaling future consolidation. This finding furthers the importance of ensuring you are where the majority of your prospects are with compelling and unique content.



**1 in 2**  
use 5+ platforms

Q4. How often do you use the following different social media websites?

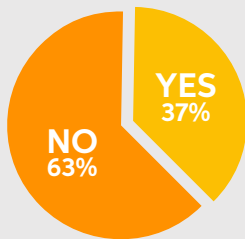
Year over year comparison: How often do you use the following social media sites during college research?

2013 2014 2015 2016

## Where Do Social Networks Fit in the Recruitment Toolbox?

As discussed earlier, it is important for enrollment marketers to understand where social networks fit in the recruitment process. Students use digital tools like college search/help sites and the “.edu” to answer questions like, “Do they offer what I want? Can I afford it? Can I get in?” and use social media platforms to answer questions like “Will I like the people? Will they like me? Will I feel welcome?”

### 1 in 3 Have Used Social Media to Research College/Universities



Did (or will) you use social media to research colleges that you have applied to (or to which you are considering applying?)

# 60%

have liked or followed a school in their consideration set.

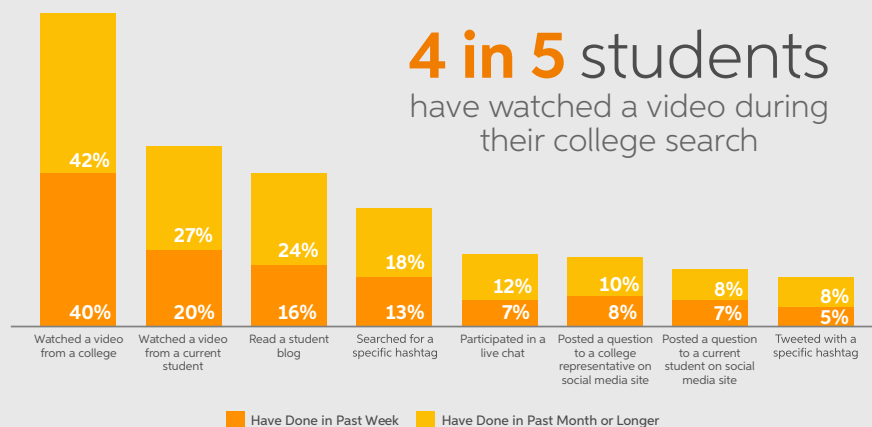
Generally, students are more likely to seek out and engage with your institution via social media when you are already on their list versus using

social media to find new schools to research. While 1/3 of students use social media when researching colleges, that means 2/3 do not. Additionally, 60% of students have liked or followed a school on their consideration set and nearly 40% of students indicate that conversations they have on social media influence their decisions of where to enroll.

## What Are Students Doing to Research Colleges on Social Media?

As outlined earlier, YouTube is amongst the top platforms used when students are researching college information. So it should come as no surprise that the top activities students perform is watching videos from colleges as well as other students.

### Activities conducted as part of college search



**4 in 5** students have watched a video during their college search

How often have you done the following during your college research process?

Additionally, student-generated content (i.e. student blogs) are ranked as an important resource when researching schools. This exhibits that students are using social to mainly consume visual content as well as connect with current students in order to get a glimpse of the true experience on campus.

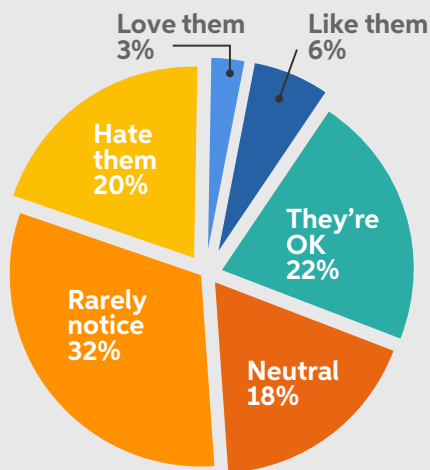
The growth in visual (and ultimately mobile) platforms like YouTube and Instagram is facilitated by the desire to access videos and connect with student content.

### Are Students Okay With Us in Their Digital Space? In A Crowded Market, How Do We Reach Them?

The reality is that social media is where your prospects are. To not find ways to appropriately reach them would be the equivalent of not acknowledging a student who walks by your table at a college fair.

When nearly 40% of students say that conversations they have on social media will impact their enrollment decisions, it's important to be a part of that conversation. Additionally, when 60% of students want a response to requests for information within 24 hours and over 9 out of 10 students want that outreach customized to them, digital channels provide a unique opportunity for reaching students directly with a message tailored to where they are in the process. This, of course, requires some planning and investment in sponsored content.

**US Teen/Millennial Instagram Users' Primary Attitude Toward Instagram Ads, Oct 2016**  
% of respondents

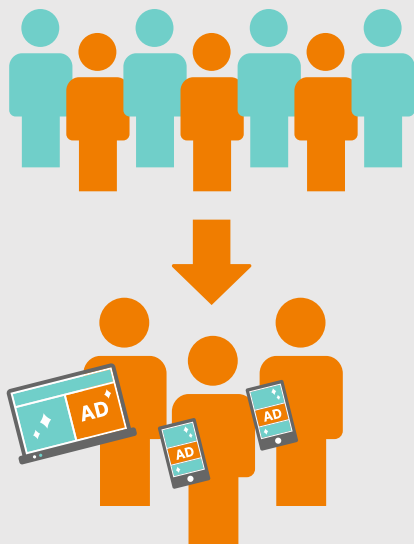


Note: ages 13-34; numbers may not add up to 100% due to rounding. Source: Adweek conducted by Survata, Oct 30, 2016

Research from Adweek<sup>(vii)</sup> shows that nearly 1/3 students have a positive reaction to sponsored content on Instagram. Additionally, based on the earlier data from STAMATS and Chegg, we know that students are more likely to have a positive reaction than a negative reaction to sponsored content from colleges on their social networks. There are two main ways to serve sponsored content to prospective students in ways that acknowledges where they are in the process. These methods are retargeting and custom audience targeting.



Retargeting is the less precise of the two opportunities for serving sponsored content. Generally, this practice involves tagging specific pages of your website to identify visitors who will have the opportunity to see your sponsored content across the web (Facebook, the Google Display network, etc). This could include your admissions landing page, program pages ... any page on your site. The challenge, of course, is that you don't know who that visitor is. It could be a parent, a guidance counselor, a student, a faculty member, or any other person browsing your site. As a result, retargeting ads oftentimes serve as "brand building" advertising with a weaker call-to-action, or in the event that your ad has a specific call-to-action, it may not be appropriate for the visitor. This results in the potential for lower than desired click through rates and conversions. With that said, retargeting can and should be an integral part of your digital marketing strategy if your budget and time allows.



Custom Audience Targeting is the act of taking a specific list of people (e.g. your NRCCUA Talent Identification Program lists) and loading them into ad servers to identify the prospect across various channels. These platforms can include Facebook, Google display, and potentially, mobile device IDs. These services will match as many records as possible to build a pool of prospects unto whom you can serve sponsored content. Compared to retargeting, this process is significantly more precise as ads are only served to identified records you provide (also called First Party Data). This ensures no wasted impressions on people who are not already on your radar.

## Dialing in on Mobile

### Where Are Students Doing Their Search?

Now that we've explained the "what" aspect of how students go about their search, it's just as important to consider the "where", or more specifically, on what device these students are doing their research to find the best-fit institution to attend.

The proliferation of the mobile device - mobile phones and tablets - have untethered students from their desks and provided a wealth of information they could access on a smaller, portable screen. While colleges continue to redesign their websites to be "mobile friendly" (a good thing since we found 8 in 10 students visit a college website on their mobile device, but that 76% of them indicate the experience to be "ok" or "challenging"), there are many other aspects and tools used by colleges for students that need further attention to be useful on such a small screen.

Looking at this, one might quickly deduce that students use their laptop and desktops more than their mobile devices. However, based on other research, we know that's not the case.

Data from Common Sense Media<sup>(viii)</sup> indicates what we already know. Teens are glued to their devices. Nearly 8 in 10 teens check their devices at least hourly, with half of students indicating they "feel addicted" to their mobile device.

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#### Attitudes Toward Mobile Usage According to US Teen Mobile Phone Users, March 2016

*% of respondents*

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**78%** Check their devices at least hourly

**72%** Feel the need to immediately respond to texts

**52%** Feel they spend too much time on their mobile devices

**50%** "Feel addicted" to mobile devices

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*Note: ages 12-18*

*Source: Common Sense Media, "Technology Addiction: Concern, Controversy, and Finding a Balance," May 3, 2016*

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What this tells us is that there must be a reason why students choose to use their less portable devices to conduct their college search rather than the one in their pocket. One possible theory, as further supported by actual user experience, is that colleges do not provide mobile-friendly content or interactions, thus requiring the student to seek out their larger devices.

We'll discuss four primary vehicles of communication and interaction that further this point: email campaigns, online applications, event registration, and student-to-student interactions.

### **Email Campaigns**

As mentioned above, email continues to be a mainstay of “push marketing” done by colleges. And at various places in the enrollment funnel, it becomes most critical to get that right. However, many colleges do not optimize their email messages for mobile devices, thus requiring the recipient to pinch and zoom to be able to read and interact with the messages they receive. If not, the delete key couldn't be closer to press and move on.

### **Online Applications**

In a 2015 study by Eduventures and further supported by Ruffalo Noel Levitz, 76% of students completed some portion of their admissions application on a mobile device. In this year's Social Admissions Report, we discovered that 13% of students actually completed the application on their mobile device. How frustrating of an experience this must have been! Not until TargetX launched its “mobile-first” application solution in 2016 was there an online application system designed for students to complete an application, partially or fully, on such a small screen. The experience was frustrating at best. It required the student to find a laptop or desktop computer to finish at worst. Colleges can't afford to put such roadblocks in the way of an interested student.

## **Event Registration**

Ask most college admission directors what activity has a higher yielding impact than anything else and they will most likely say “getting the student to visit campus.” On-campus events (and off-campus information sessions to a lesser degree) have a tremendous impact on a student’s interest in attending that institution. However, the ability to find and register for a campus visit - tour, interview, information session, etc. - is difficult or impossible at many colleges today. The event registration systems that are more widely used are not designed to be completed on a mobile device, creating a missed opportunity for students with a mobile phone in their hand. Yet even with this, we still found 4 in 10 students registering for an event from their mobile device. But since many more than this actually visit a campus, the inability to register on their mobile phone is putting another roadblock in the way of getting more students to campus.

## **Student-to-Student Connections**

A study by TargetX<sup>(ix)</sup> has shown that if a student has connections with 9 or more students after being admitted, they are 93% more likely to attend that institution. Fostering interaction among students is a critical component today to yielding the right class for an institution. And much like Facebook, Instagram, Snapchat, etc., those tools are all designed to be used on mobile devices. So for a tool to provide a vehicle for student-to-student interactions, it must also be designed for primary use on a mobile device, similar to the TargetX Schools App solution used by hundreds of colleges today.

## **What Does All Of This Mean?**

Colleges today must assess and test all of the tools and messages they are putting in their prospective student’s hands for use on their mobile device. The standard today is the 4.5-5.5 inch screen we all have in our pockets. Without that optimization - which includes both readability and interaction by touch - students may simply move on to another college.

## CONCLUSIONS

Differentiate between “digital” and “social” tools. While it may be appropriate for a youthful member of your team to manage your social networking presence, this person may or may not be the best fit for managing your entire digital recruitment strategy.

Nearly all students report using at least one college search/help site for their research. These sites are oftentimes the first (and even last) stops on a student’s college search.

Digital sources are used for discovery and information gathering. An effective digital recruitment strategy focuses on reaching students on the channels they use, when they are using them.

The path to application is fragmented. Students stop and start their search across multiple devices. Connecting the dots is a challenge, but important.

Students want mass personalization. Nine out of 10 students want information tailored specifically to them within 24 hours of requesting it. “Students want what they want, when they want, where they want it”.

There is a difference between student-to-student and student-to-school. With respect to each platform and channel, it is important to understand intent versus use.

Social is Visual: The majority of students use YouTube most frequently when researching colleges online.

Networks consistently shift: Twitter is down, SnapChat is up – But still not the #1 platform used by students to specifically research colleges.

Interactions matter: Decisions to enroll are influenced by the interactions they have with other admitted/current students.

# Survey Methodology and Demographics

**Michele Madansky, Ph.D.** from Madansky Consulting, managed the research for this project.

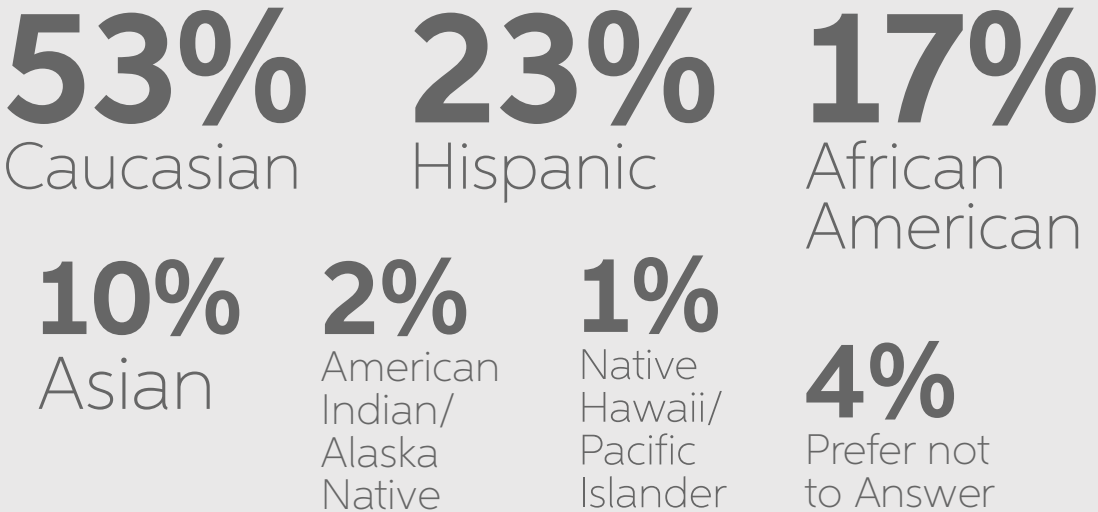
**Fielding Dates:** Email invitations were sent to active college researchers on Chegg.com and Niche.com in November 2016 to participate in the survey.

**Number of Responses:** Over **3,500 high school juniors and seniors** were included in our study (72% seniors and 28% juniors). Since 2012, we have surveyed over 7,000 students as part of this study.

Responses are weighted to **44% male, 56% female** to be reflective of the current college-bound population. Based on what we consider to be the national population of college-bound students, the margin of error is +/-1.5% at the 96% confidence level.

**Demographic Breakdown:**

Respondents to this national survey represent **students from all 50 states.**



## **Credits:**

- i. TeensTALK® 2016: Key Influencers at Key Phases of the College Search, Rogers and Sickler, February 2016
- ii. The Inbox Report 2016: Consumer Perceptions of Email, Fluent LLC, November 2016
- iii. The College Board, 2015 NACAC Conference
- iv. Number of Digital Platforms that US Millennial Internet Users Visit Daily, LanchLeap, December 2016
- v. 2016 Mobile App Report, comScore Mobile Metrix, U.S., June 2016
- vi. US Over-the-Top (OTT) Video Service User Penetration, eMarketer, October 2016
- vii. Survey on Attitudes Toward Instagram Ads conducted by Survata, Adweek, October 2016
- viii. Technology Addiction: Concern, Controversy, and Finding a Balance, Common Sense Media, May 2016
- ix. Engaging Diverse Students with Social Media, Inigral/TargetX, June 2010

## **Special Thanks**

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- Seana Quintero, Art Director, Chegg