

studentPOLL

MARKET INTELLIGENCE FOR HIGHER EDUCATION

IN THIS ISSUE

1 STUDENTS CONTINUE TO SHOW A STRONG PREFERENCE FOR USING INDIVIDUAL COLLEGE HOME PAGES TO GATHER INFORMATION, RATHER THAN ON-LINE COLLEGE INFORMATION SERVICES.

2 PRINT CATALOGS ARE ONE OF THE MOST IMPORTANT INFORMATION SOURCES FOR PROSPECTIVE STUDENTS, FAR MORE IMPORTANT THAN WEB SITES.

3 STUDENT PREFERENCE FOR ON-LINE APPLICATION HAS FALLEN IN THE LAST YEAR, WHILE PREFERENCE FOR THE TRADITIONAL PAPER APPLICATION HAS RISEN.

4 STUDENT ACCESS TO THE INTERNET IS ALMOST UNIVERSAL AND NEARLY 70 PERCENT ARE NOW USING E-MAIL.

5 ALTHOUGH ACCESS TO THE INTERNET AND GENERAL USE OF E-MAIL CONTINUE TO RISE, STUDENTS PREFER PERSONAL CONTACT TO ELECTRONIC COMMUNICATIONS BY A WIDE MARGIN.

6 STUDENTS ARE NOT TURNED OFF BY THE IDEA OF A COLLEGE REQUIRING THEM TO BRING A COMPUTER TO SCHOOL.

7 AN OVERWHELMING MAJORITY OF STUDENTS ACROSS ALL INCOME LEVELS PLAN TO BRING THEIR OWN COMPUTERS TO COLLEGE.

PUBLISHER'S NOTE

Use of the Web and college Web sites continues its meteoric rise, but electronic communications remain far from the predominant communications tool.

In what has now become an annual event, this issue of *studentPOLL* revisits how students of above average academic ability are using on-line communications technologies in college selection. For the most part, our latest study confirms the trends we have tracked since 1996, with one major surprise.

In 1997, we predicted the paper application was doomed. This year's data suggests that our prophecy might have been a bit premature. In fact, student preference for filing on-line has actually fallen.

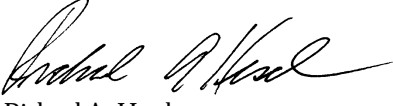
What explains this surprising reversal? We were able to synthesize some conclusions from the anecdotes students shared with our interviewers as they answered the question. The concerns about on-line applications fall into two broad categories: the security and confidentiality of electronic transactions, and the perception that an on-line application may be given less serious consideration than one filed on paper.

Another major finding worth highlighting here did not surprise us at all, since it is one that has shown up in our research on admissions communications for many years — long before the Web existed: Substance precedes form. Our

evidence is crystal clear: When students log onto a college Web site they're looking for content, content, and content. The slick, hyperbole-filled stuff that characterizes many viewbooks and other recruitment materials is likely to turn them away on the Web, if it doesn't already turn them away in print.

Finally, it is equally apparent that digital communications are still far from supplanting the Gutenberg variety as the most influential source of information on college choice. Yes, they're growing more important every year, but our evidence suggests that you should keep your printing presses in good repair for at least a few more years.

This issue of *studentPOLL* marks the beginning of our third year of publication. Previous subscribers may note that we have a new look, intended to make a quick reading of our findings even easier. We've also added a new section, "Hot Topics," which provides insights on questions posed by our readers. We hope these changes will enhance the value of *studentPOLL* for our subscribers.


Richard A. Hesel
Publisher

1 Students continue to show a strong preference for using individual college home pages to gather information, rather than on-line college information services.

Use of individual college and university Web sites has increased dramatically over the last year. Seventy-eight percent of the higher-ability students surveyed report using individual college Web sites on the Internet, compared to 58 percent last year, and only 4 percent in 1996. (Table 1)

Among those who logged onto individual college sites, 20 percent visited 1 to 2 sites; 25 percent 3 to 5 sites; 29 percent 6 to 10 sites; and 26 percent 11 or more sites. In fact, this year's findings reveal that 55 percent of all students who indicated that they accessed college Web sites looked at 6 or more sites, compared to 42 percent in 1997.

Our findings show that students are not only using the Web more frequently as an information source, but they are using the Web to access in-depth, substantive information about colleges and universities. The Web is simplifying

information gathering and appears to offer students an effective tool to compare different institutions and contrast their academic strengths and distinctions. The data reveal that a very high proportion of students are using the Web to explore on-line catalogs and to collect information on specific programs and majors and to get a general "feel" for the school and the campus. (Table 2)

Of lesser importance to students in their college Web searches are on-line financial aid and admissions applications, faculty information, and on-line financial aid estimates. However, it should be noted that more than one-third of the students using college Web sites also report seeking this information as well.

Once again, *studentPOLL* tested student awareness and usage of a sampling of on-line college information services. Student unaided awareness (without any

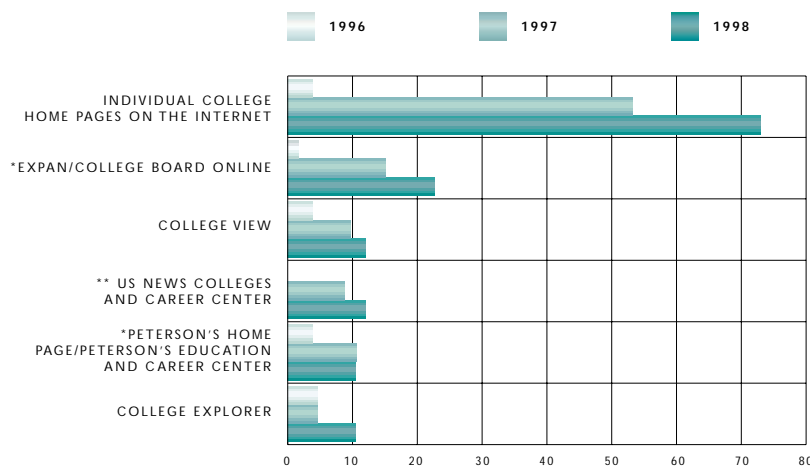
prompting from the interviewer) for any single on-line service was extremely low. College Board Online achieved the highest level of awareness with 7 percent of the market.

For respondents who did not indicate awareness of a specific on-line information service, interviewers read a list of on-line services and asked respondents which ones they recognized. Overall, respondents this year demonstrated a slight increase in awareness of on-line information services compared to our previous study. (Table 3)

Far more important, actual student use of on-line services has remained relatively flat, the one exception being College Board Online. This year, 23 percent of students surveyed reported using College Board Online, compared to 6 percent for the previous year. Higher student use of this on-line service may reflect the fact that many high school guidance counselors recommend that students use it to select and screen schools in the initial stages of college consideration. Student use of College Explorer and Peterson's Education and Career Center remained unchanged in 1998 with a very small number of students reporting they have used these on-line services.

TABLE 1

Use of on-line college information sources



*Asked differently in 1996

**Not in existence in 1996

TABLE 2

Type of information sought on individual college web sites

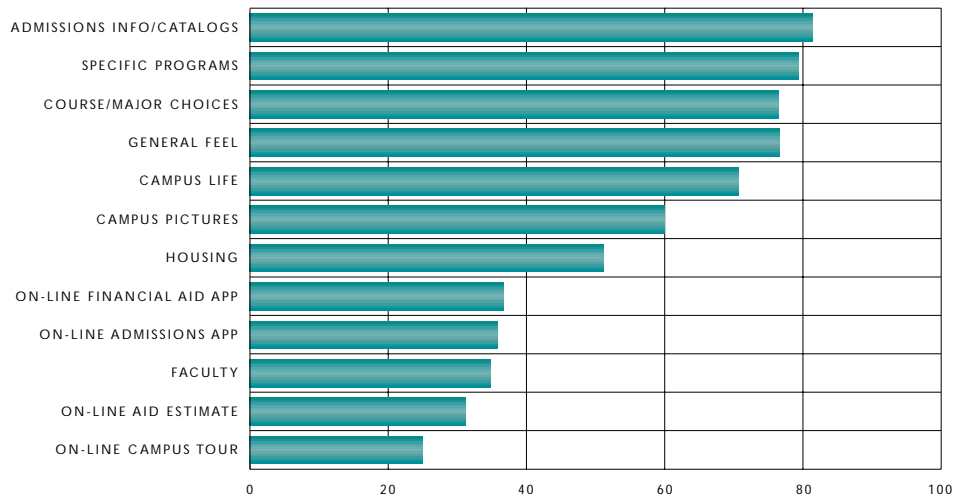
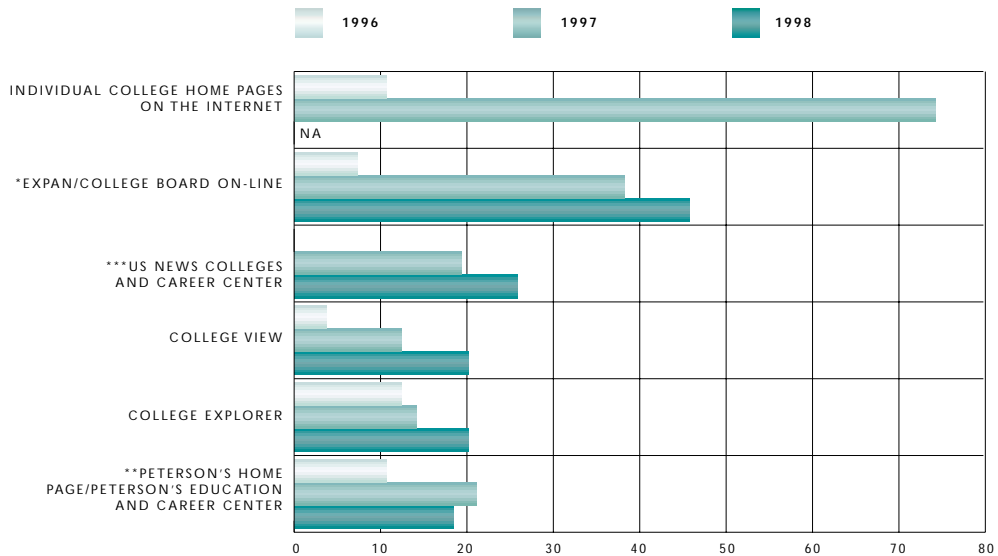


TABLE 3

Awareness of on-line college information sources



* Total awareness (aided and unaided); mentions of 10% or more in 1998

**Asked differently in 1996

***Not in existence in 1996

NA=Not Asked

ADVISORY

Use all of the Web's capabilities to give life to your site's content. Academic information, which is potentially the most exciting content a college can provide, is usually presented on the Web in a manner conducive to sleep. Make it come alive! Provide optional audio and video clips about faculty and students. Show examples of interesting work. Use 360-degree panoramas to show off academic facilities. Make it as easy as possible for students to find the academic information they seek by using appropriate search engines and well-thought out links.

2 Print catalogs are one of the most important information sources for prospective students, far more important than Web sites.

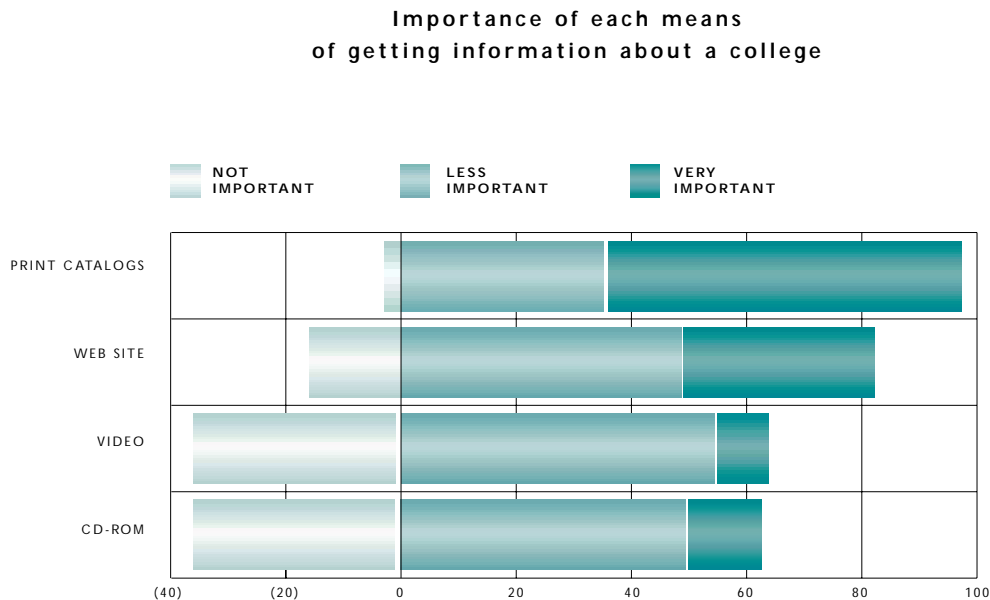
While viewbooks and search pieces may have supplanted catalogs in the recruitment mailing sequence, the majority of prospective students continue to view catalogs as a very important source of information. In rating four recruitment communications tools, the CD-ROM, video, Web site, and print catalog, 62 percent of students cited print catalogs as a very important source of information, followed by 34 percent of students who ranked Web sites as very important. (Table 4)

Consistent with findings on admissions communications reported in previous editions of *student*POLL, videos and CD-ROMs were the least important information tools in college choice. As Web bandwidth and software sophistication continue to accelerate (making video, sound, and other multimedia features more practical and readily available on-line), the need for CD-ROM and video may very well disappear. At the very least, the findings from this study and last year's raise serious questions about the value and effectiveness of CD-ROMs and videos in student recruitment now.

ADVISORY

Given the importance of catalogs to prospective students (and parents) in college selection, devote adequate time and resources to producing an interesting catalog. Resist the temptation to make the catalog a longer version of the viewbook. Instead, focus on making its academic content more exciting. Put academic content first and move the rules and regulations to the back.

TABLE 4



3 Student preference for on-line applications has fallen in the last year, while preference for the traditional paper application has risen.

Just last year *studentPOLL* reported that a sizable segment of students preferred to file an on-line college application and all signals pointed toward the electronic application quickly becoming the preferred application method for an overwhelming majority of the prospective student market. Based on our current results, that trend seems to have reversed itself.

In 1998, 18 percent of students surveyed actually used an on-line application, with just 6 percent mailing in a computer disk. Ninety-five percent reported mailing a traditional paper application to the colleges of their choice. (Table 5)

However, prospective student preference for the on-line application dropped from 34 percent in 1997 to 21 percent this year, while preference for the traditional paper application rose from 48 to 65 percent during the same time. An interesting subgroup variation is that preference for the on-line application

was nearly twice as high among males compared to females: 28 percent versus 15 percent. (Table 6)

While we can only surmise the reasons for this sharp decline (e.g. student concerns about Web privacy and security, and perhaps a sense that an electronic application may not be evaluated as seriously as a traditional paper application), we will continue to track and explore these issues more fully in our next cycle of research.

ADVISORY

Be cautious about waiving the fee for on-line applications.

Fee waiver may raise questions about whether on-line applications will be treated the same as paper applications. Moreover, it may encourage frivolous applications that are likely to produce lower yield.

TABLE 5

Application methods used

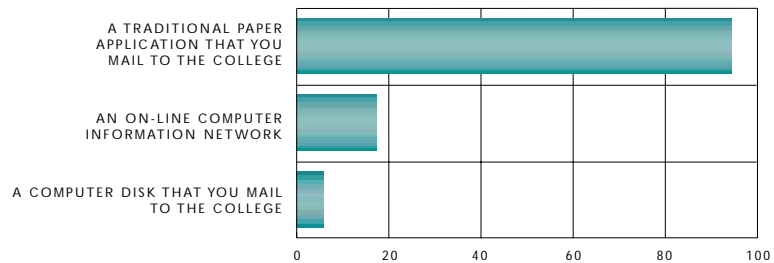
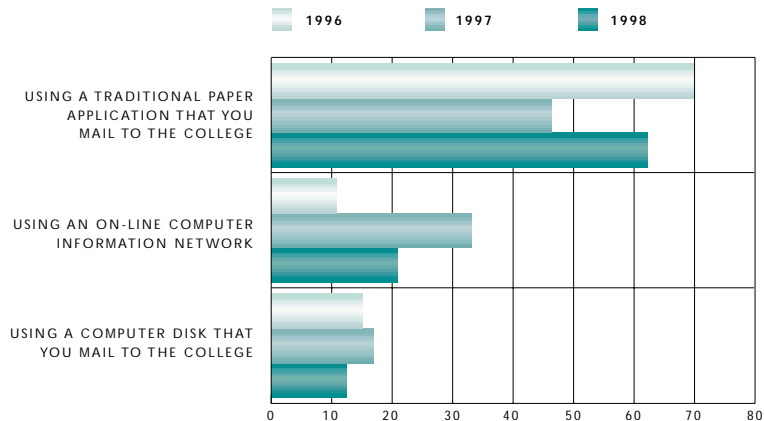


TABLE 6

Application preference



ADVISORY

Provide secure links for on-line applications and emphasize that you treat them the same as paper applications. Ensure students of confidentiality and establish an immediate, on-line mechanism to inform prospects of the receipt of their electronic applications.

4 Student access to the Internet is almost universal and nearly 70 percent are now using e-mail.

ADVISORY

E-mail provides opportunities for innovations in the way you offer information to prospective students. Use e-mail to share information about new courses or programs in a student's field of interest, provide access to course syllabi or other information related to a prospect's academic or personal interests, or give updates on campus news or other breaking stories. Include embedded links to relevant sections of your Web site in e-mail messages.

Our findings this year also demonstrate, as we suggested last year, that the Internet is truly becoming universally accessible to the higher-ability prospective student market. The growth has been remarkable if not incredible: In 1998, 82 percent of prospective students reported that they had access to the Internet, compared to 72 percent last year, and 31 percent in 1996.

Thirteen percent of those polled anticipated access in 1998 for a combined total of 95 percent of students polled currently using or anticipating use of the Internet in 1998. (Table 7)

A high proportion of students surveyed also currently use e-mail and usage has risen modestly over the last year, from 61 to 69 percent. (Table 8)

TABLE 7

Current and anticipated access to the Internet

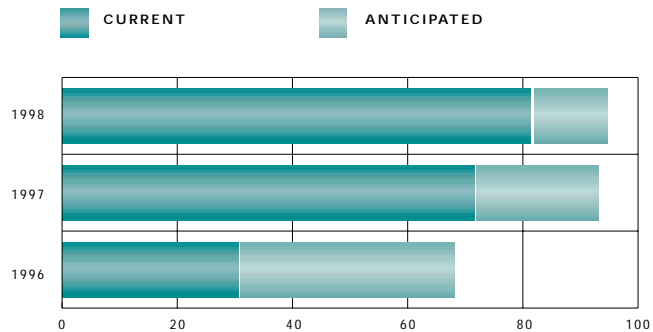
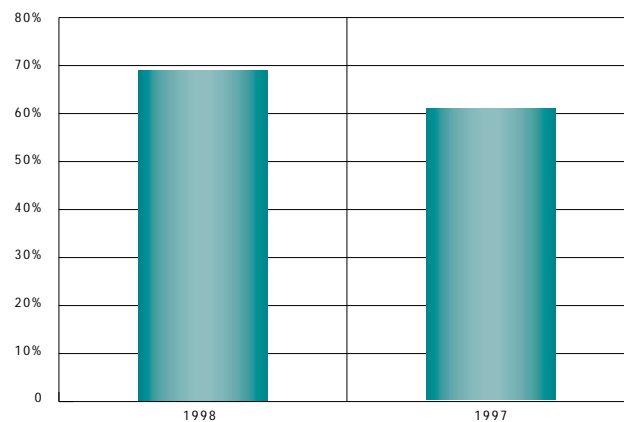


TABLE 8

Current use of e-mail



5 Although access to the Internet and general use of e-mail continue to rise, students prefer personal contact to electronic communications by a wide margin.

Our findings are disappointing news for those who think the Web might supplant the need for personal communications. We asked students to rate their preference for various ways colleges might communicate with them such as by e-mail, chat room, regular mail, telephone, or in person. Then we asked respondents to tell us which methods they preferred for communicating with college students, faculty, an admissions counselor, or financial aid officer; requesting information; and scheduling a campus visit or interview. Even though nearly 70 percent of our respondents currently use e-mail, human contact is preferred by a very

wide margin. Compared to other communications methods, chat rooms were a negligible factor.

For example, some 63 percent of respondents preferred communicating with college students by phone or in person and 76 percent preferred similar methods for communicating with faculty. In contrast, one-third of respondents indicated a preference for communicating with current college students by e-mail or chat room and they were even less inclined to prefer communicating with faculty this way. The only type of communication a plurality of respondents preferred to do on line was to request specific information from a college. (Table 9)

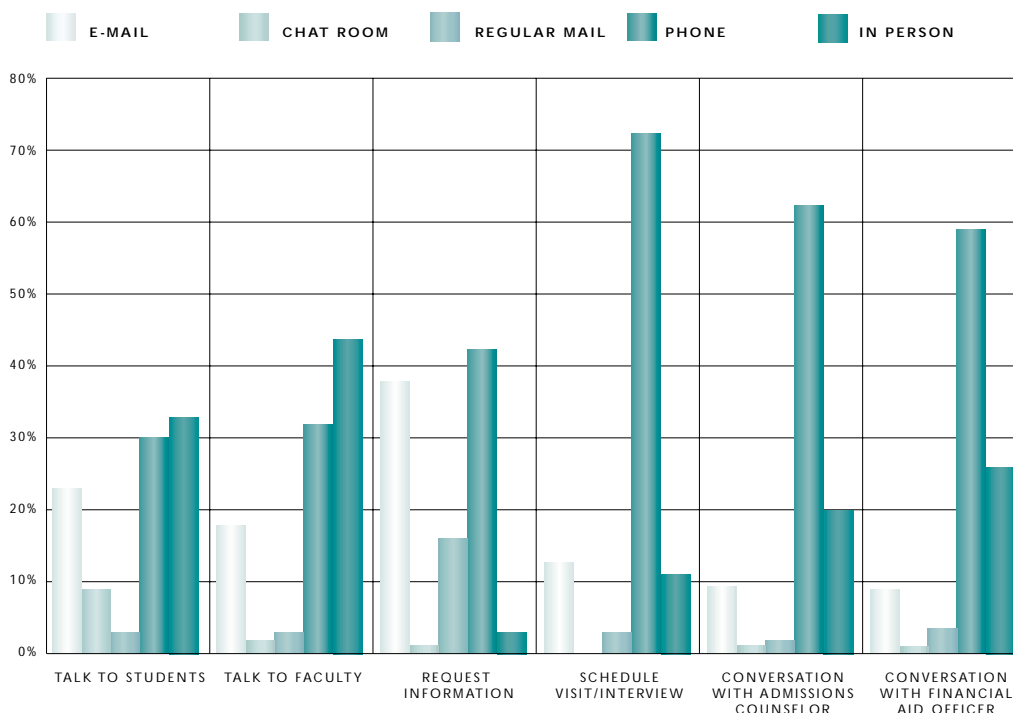
In scheduling an interview or having a conversation with an admissions counselor or financial aid officer, students strongly preferred handling it by telephone rather than in person or electronically. Nearly three-quarters of respondents indicated a preference for scheduling an interview or visit by telephone and a majority preferred talking to an admissions counselor or a financial aid officer by phone (62 percent and 59 percent, respectively).

ADVISORY

Do not allow the promise of new technologies to turn your institution's attention away from the value of personal contact. Technology may be opening new avenues of communication, but personal communication is still vastly preferred by prospective students.

TABLE 9

Preferences for communication with colleges of interest



6 Students are not turned off by the idea of a college requiring them to bring a computer to school.

As more and more institutions around the country consider whether to make it a requirement that all incoming freshmen come to college with a computer, our findings provide evidence that such a requirement would not deter students from attending the college of their choice.

Specifically, we asked students what their reaction would be if the college they chose required that they own a

computer. The response was virtually universal: 95 percent said they would still attend the college; 4 percent indicated they would go somewhere else; and 1 percent said they did not know what they would do.

Additionally, this year's data suggest that the gap is closing between what students view as the level of computer proficiency they believe they need for college and their perceived proficiency. Nearly half (48 percent) of students surveyed perceive they will need some knowledge of word processing skills and/or other software programs, while 43 percent view their proficiency at the necessary level. Similarly, 41 percent perceive a need for experience in using a variety of software programs, while 42 percent note that level of experience. (Table 10)

The charts on page 9 provide comparison data from our technology studies in 1996, 1997, and this year's study on students' self-rated computer proficiency and the CPU or processing speed of

the computer they own or use most frequently. The findings suggest that students are integrating technology into the learning environment well before college and that the role of technology in the student recruitment and learning process continues to evolve. (Tables 11 & 12)

ADVISORY

Don't try to make computers or technology the centerpiece of your marketing strategy. In most instances, technology is not a differentiating factor: students expect that all colleges will be technologically advanced much in the same way they expect that all residence halls will have beds or that all college dining halls will serve food.

TABLE 10

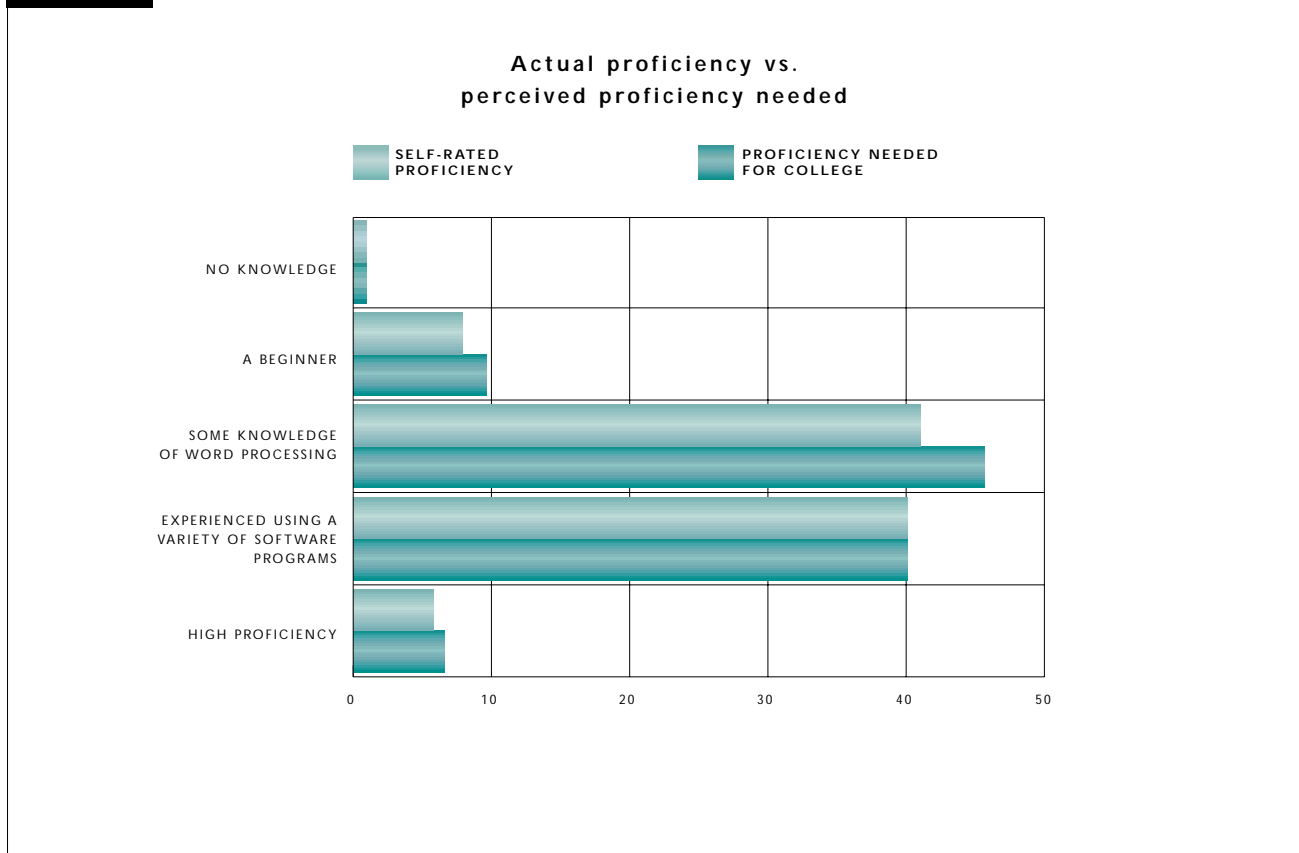


TABLE 11

Self-rated computer proficiency

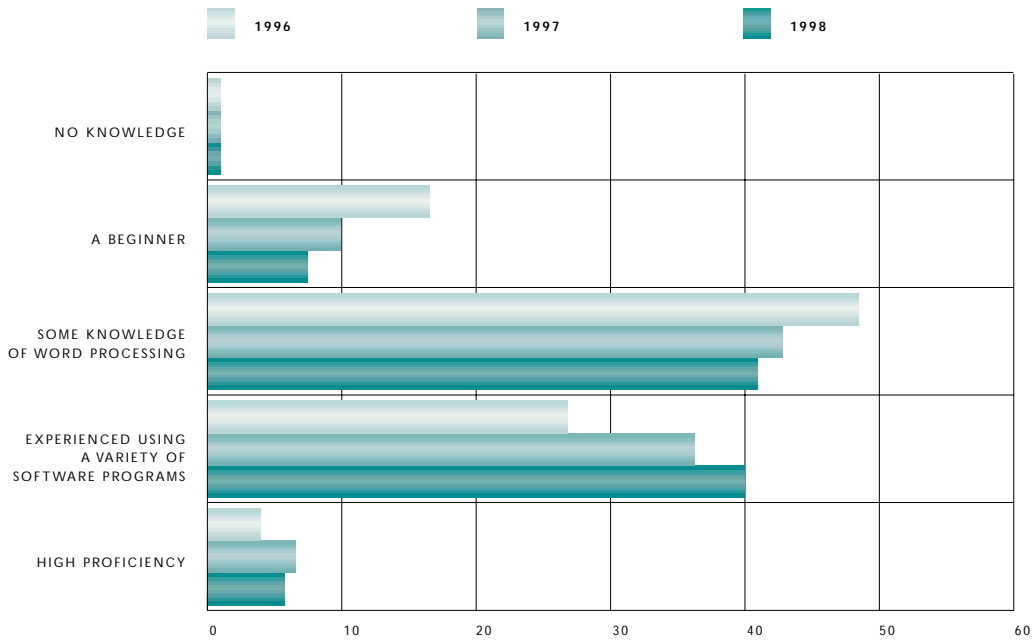
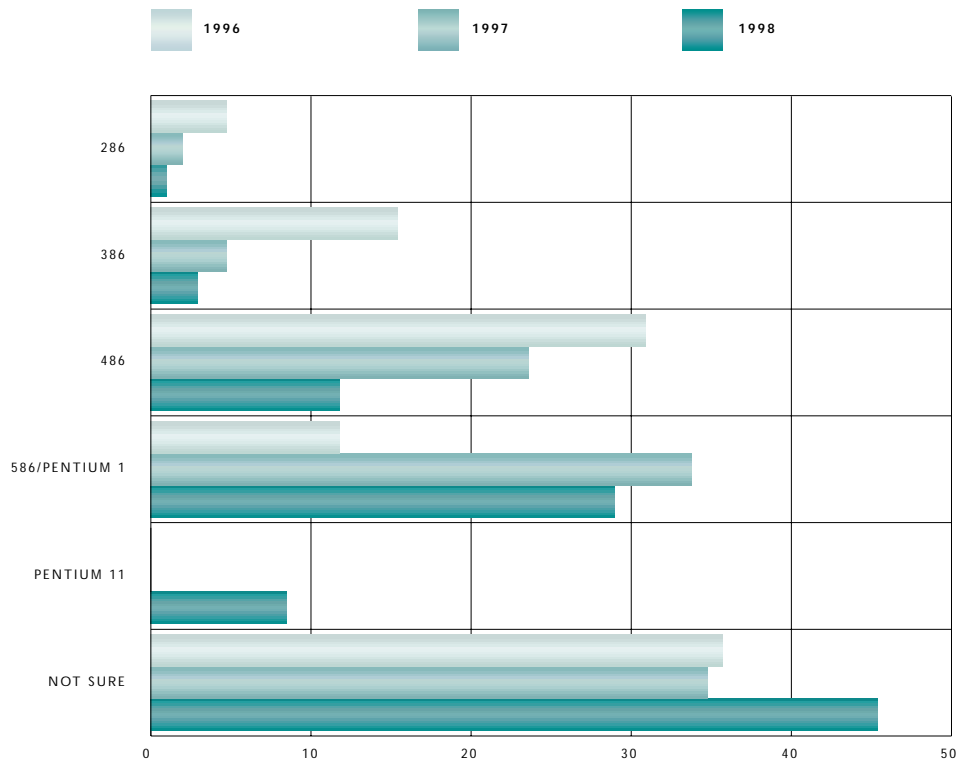


TABLE 12

CPU on IBM-compatible owned or used most frequently



7 An overwhelming majority of students across all income levels plan to bring their own computers to college.

TABLE 13

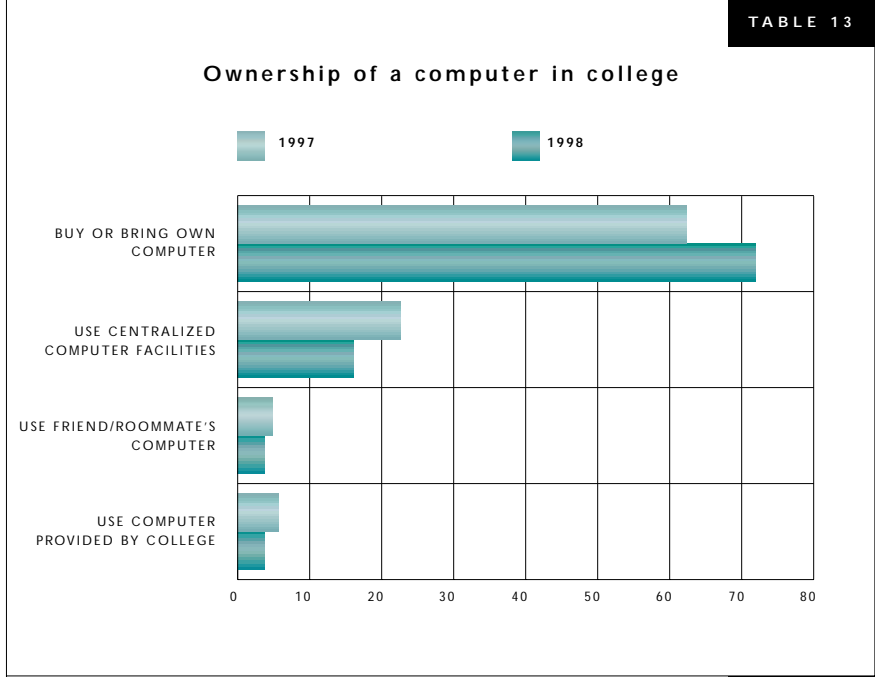
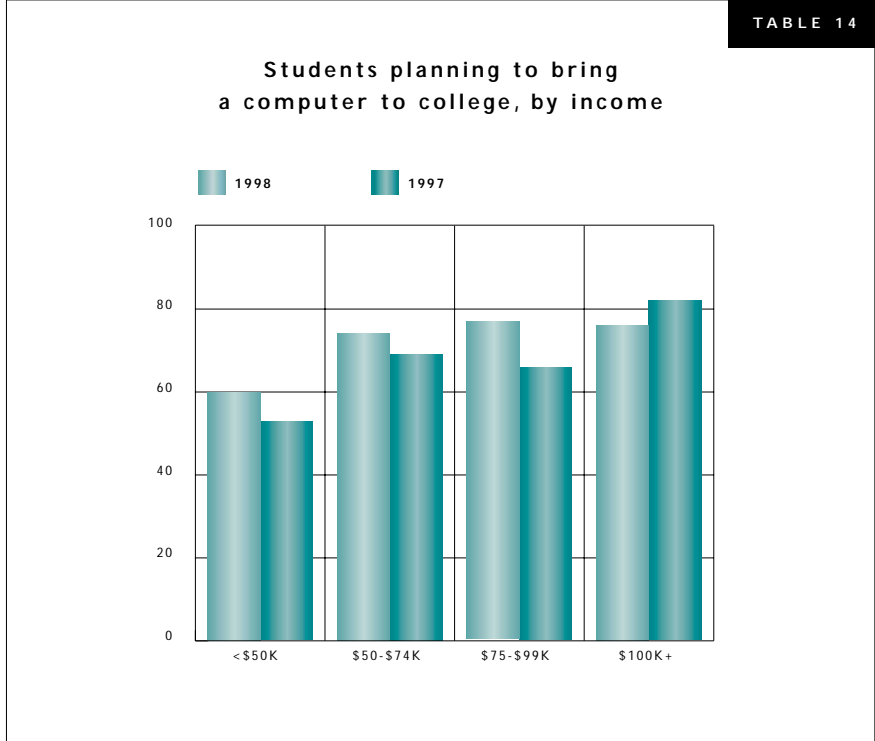


TABLE 14



This year, nearly three-quarters of the students surveyed said they planned to buy or bring their own computer to college, a modest and statistically insignificant increase of 6 percent over last year. Only 17 percent of students surveyed this year indicated their intention to use centralized computer facilities compared to 23 percent in 1997. (Table 13)

In general, income does not appear to be a barrier to computer ownership among the higher-ability students we surveyed. While a smaller proportion of students from families with incomes of less than \$50,000 plan to bring a computer to college, the differential has narrowed among all income levels. For example, students with family incomes of \$50,000 to \$99,000 are just as likely to bring a computer to college as those with incomes of \$100,000 and above. This year, 76 percent of students with incomes of \$100,000 and above plan to buy or bring a computer to college, 77 percent in the \$75,000 to \$99,000 income range and 74 percent with incomes from \$50,000 to \$74,000. (Table 14)

Among those planning to bring a computer to college, 69 percent plan to bring a desktop model while 26 percent intend to bring a laptop computer. Only a very small percentage of students plan to use a computer provided by the college or owned by a roommate or friend.

*student*POLL is an authoritative national survey that measures the opinions, perceptions, and behavior of high-ability, college-bound high school students and their parents. Available only by subscription, it is published quarterly by Art & Science Group, Inc., leading institutional marketing consultants to higher education and the non-profit sector. Information about Art & Science Group and how to order subscriptions to *student*POLL can be found on the back cover of this report.

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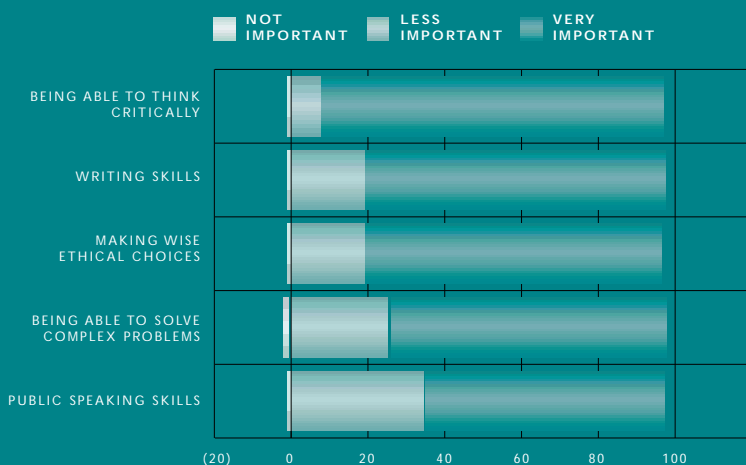
The findings reported in this issue of *student*POLL are based on in-depth telephone interviews with a random national sample of 500 high school seniors who plan to enroll in four-year colleges in the fall of 1998. To qualify for an interview, respondents must have achieved a combined, SATI score of 1,050 or higher. The study sample was drawn and weighted to represent the national distribution of students with qualifying SAT scores by geography, gender, intended major, and income. Questions about survey methods, findings, and other matters should be addressed to Art & Science Group, Inc.

HOT TOPIC

Critical thinking rated highest among skills students think are important in college and their future careers.

TABLE 15

Future importance of learned skills



To gauge perceptions about what skills would best prepare them for college and careers, prospective students were asked to rate the importance of six key skills. The largest number of students (91 percent) ranked critical thinking as very important to their future aspirations, 80 percent writing skills, 79 percent the ability to make wise ethical choices, and 73 percent the ability to solve complex problems. (Table 15)

Our findings confirm the importance of what many institutions are already emphasizing to prospective students — the development of critical thinking skills in the classroom.

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