



2022

VOICE OF THE ONLINE LEARNER

What Current Preferences May Signal for the Future of
Online Graduate Programs

Council of Graduate Schools Annual Conference

WILEY University Services

TODAY'S PRESENTERS



David Capranos

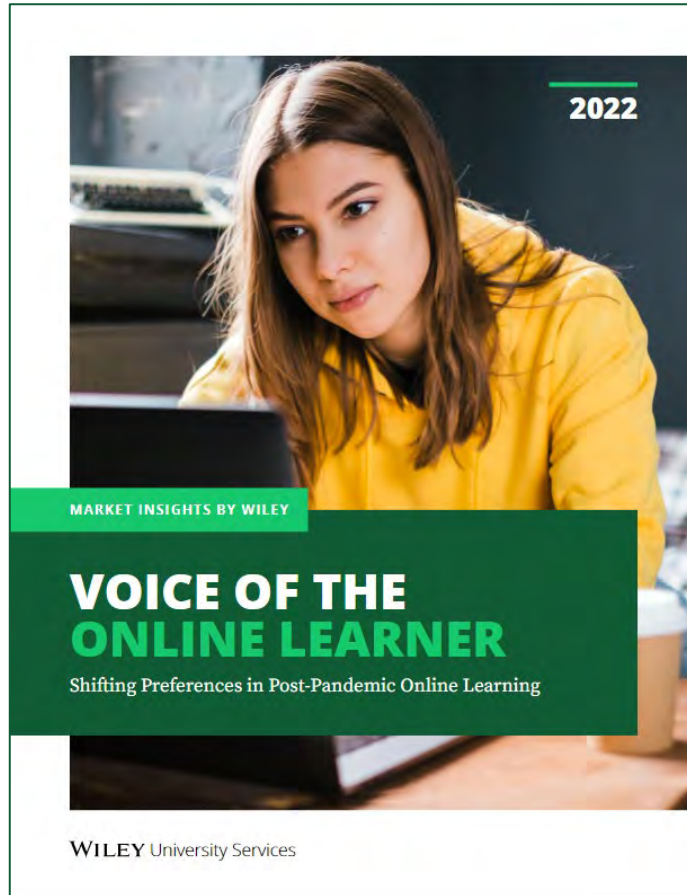
Wiley University Services



Dr. Roxanne Gonzales

New Mexico Highlands University

METHODOLOGY



In the **spring 2022** we surveyed over **2,500+ US post secondary online learners** (prospective and current students + recent graduates)

Born out of a decade of surveying the online learner, this reimagined report serves as the market-leading source of insights about the distinct online population.

Insights about:

- The two types of online learners, and what defines them
- Views of and loyalty to the modality post-pandemic
- A new openness to occasional, synchronous learning
- Memorable and effective marketing mediums
- Why they aren't using employer benefits more often

More insights about online learning can be found in our companion report:
Online Learner Experiences 2022

45% of the sample were master's students

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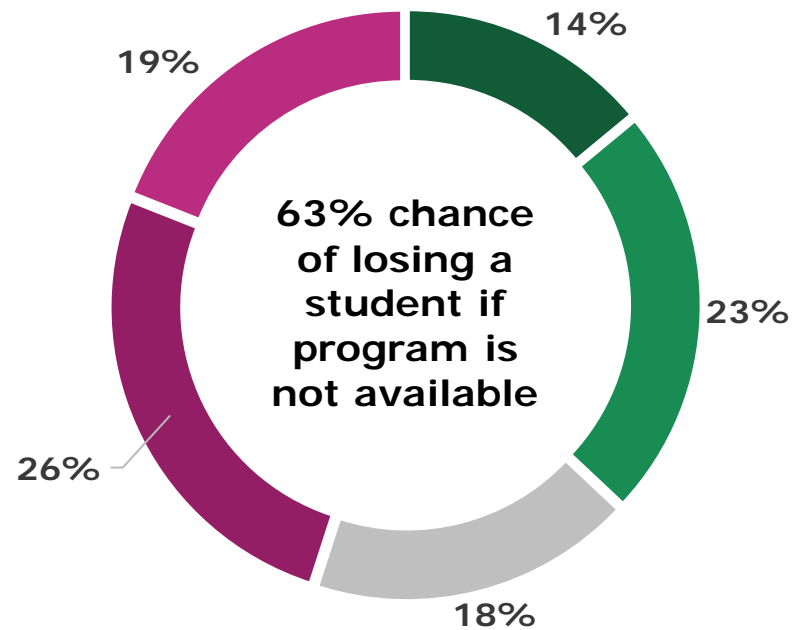
ONLINE LEARNERS' LOYALTY TO THE MODALITY ENDURES – BUT THE PANDEMIC DRIVEN BUBBLE MAY STILL BURST

Key finding 1



MODALITY ABOVE ALL

Q: If the program you wanted was not available in an online format, how likely is it that you would have enrolled in an on-campus program?



■ Definitely would ■ Probably would ■ Not sure
■ Probably not ■ Definitely not

Loyal to their chosen modality

- **77% choose modality first**
- Not offering a program online:
 - 44% chance of losing a student in 2017
 - 63% of losing them in 2022
- 60% of students would choose an online program at a different school if not offered online at their first choice

PANDEMIC-DRIVEN LEARNERS

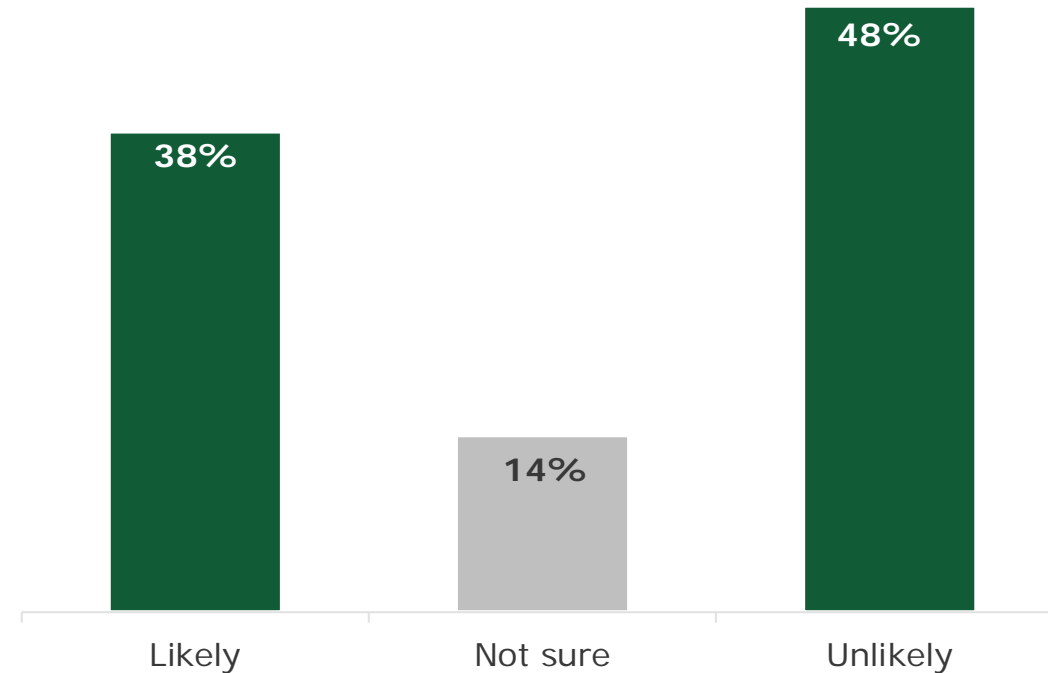
One-third of prospective online learners hadn't considered online learning before the pandemic.

We've identified this group as **"Pandemic-Driven Learners"** and they behave differently from **"Traditional Online Learners"**

Pandemic-Driven Learners

- Attends online initially due to pandemic-related restrictions
- Skews under the age of 25
- More likely to prefer in-person instruction
- Open to synchronous session, whether online or in-person
- More likely to switch to an on-campus program in the future

Q: *Of those that had not consider online learning prior to the pandemic:* **How likely are you to change to a campus-based program in the future for your degree?**



TODAY'S ONLINE LEARNERS ARE NOW MORE OPEN TO OCCASIONAL SYNCHRONOUS SESSIONS

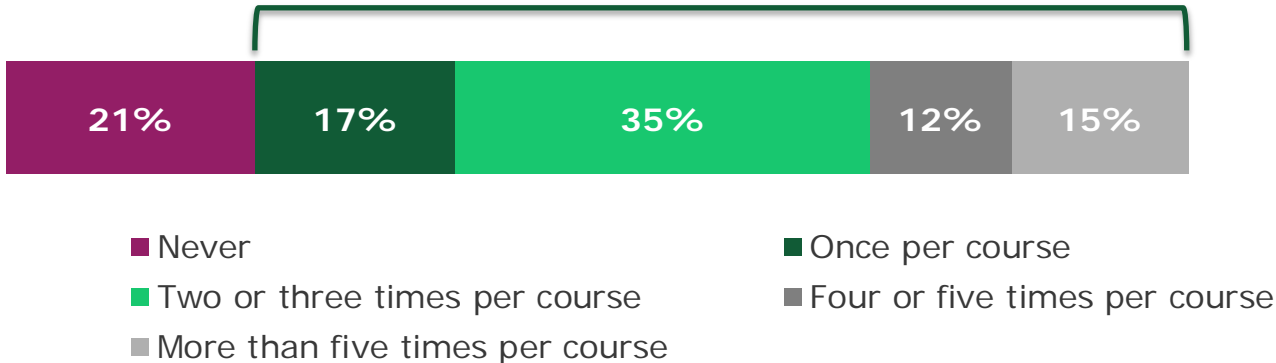
Key finding 2



A NEW OPENNESS TO SYNCHRONOUS

Q: How often would you be willing to log in at a specific time to join a required discussion or virtual lecture with your instructor and classmates for each class that you attend?

79% of learners would take at least one synchronous session per course



What could synchronous look like?

- Synchronous, but not for the full program
 - **69% prefer asynchronous**, overall, but **79% are open** to at least one synchronous session per course
- 65% would want the synchronous session weekday evenings
- Sessions should be online verses on-campus
 - 79% prefer a program that does not require campus visits

IS LOCATION STILL IMPORTANT?

Q: How far do you live from the closest campus/service center of the school in which you enrolled?

2012



2017



2022



■ Less than 50 miles ■ 50 to 100 miles ■ More than 100 ■ Unsure

Staying close to home

- More options than ever before, but students may look further for unique offerings.
- One-third of learners say **being physically close to campus is important** to them.
- One-third of Pandemic-Driven Learners want to eventually return to a campus program

DIGITAL MARKETING IS MOST MEMORABLE

Key finding 3



WHERE STUDENTS ARE LOOKING

Q: How effective were each of the following methods in making you aware of a potential online program?

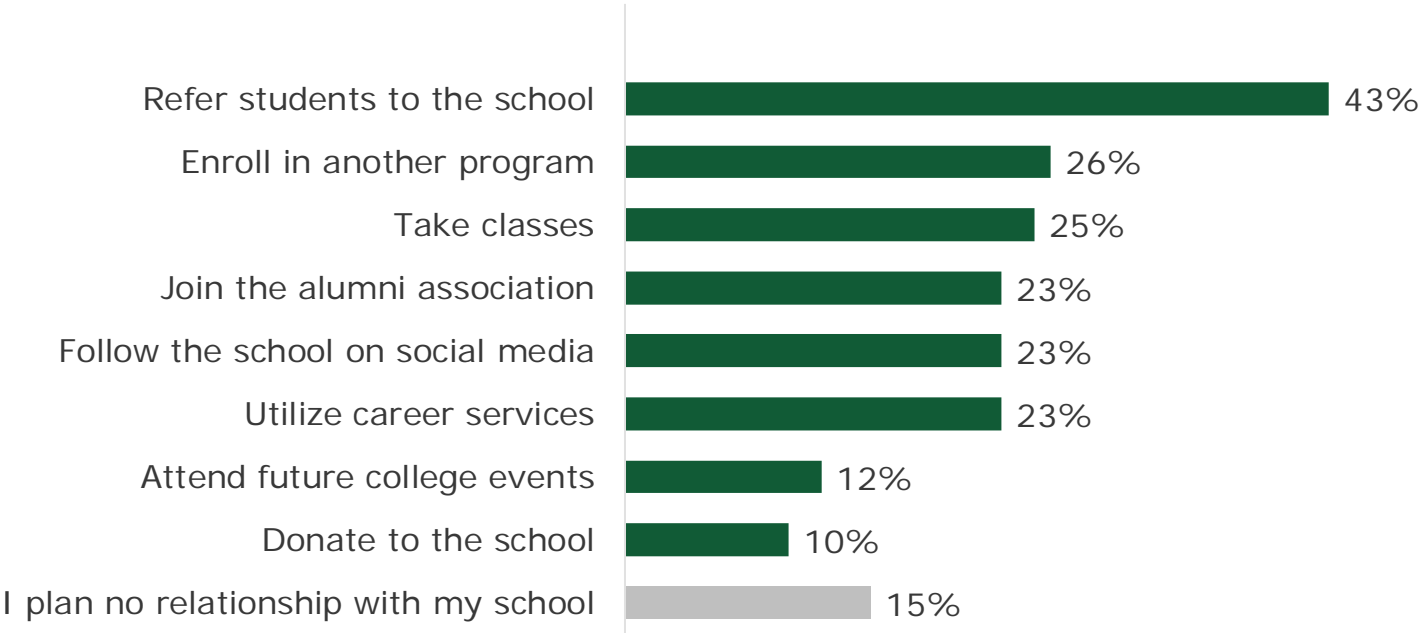
	% Remembered Ad	% Found it effective
Listings on Google	26%	78%
Email	28%	70%
Ads on college search sites	21%	70%
Ads on social media	22%	69%
Commercials on TV	14%	67%
Direct mail	10%	61%

Where they go next for information?

- Nearly half of learners turn to the institution’s website for detailed information:
 - 34% will email
 - 30% will call
 - Only 11% will use live-chat
- 32% will continue searching Google

CREATING ADVOCATES

Q: (Current students) After graduation from your current online program, which of the following actions do you expect to take?



Online alumni returning

- **Nearly half are likely to go back to the same school**
 - Two-thirds of these would enroll in another online program
 - 43% of those that are still enrolled in their program would refer another student to their program

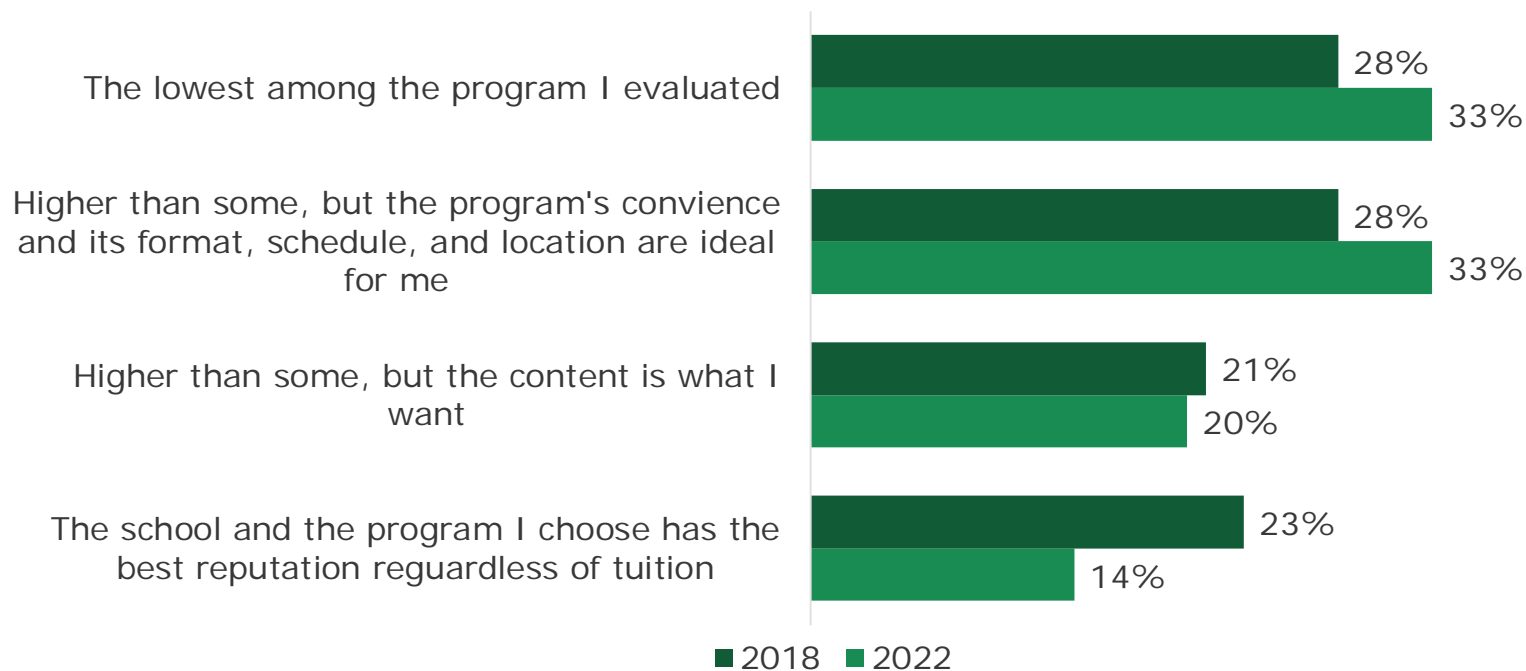
AFFORDABILITY REMAINS A TOP CONCERN

Key finding 4



PERCEPTIONS OF AFFORDABILITY

Q: Which of the following statements about tuition is closest to how you will make your enrollment decision? *"Tuition for my preferred program is:"*

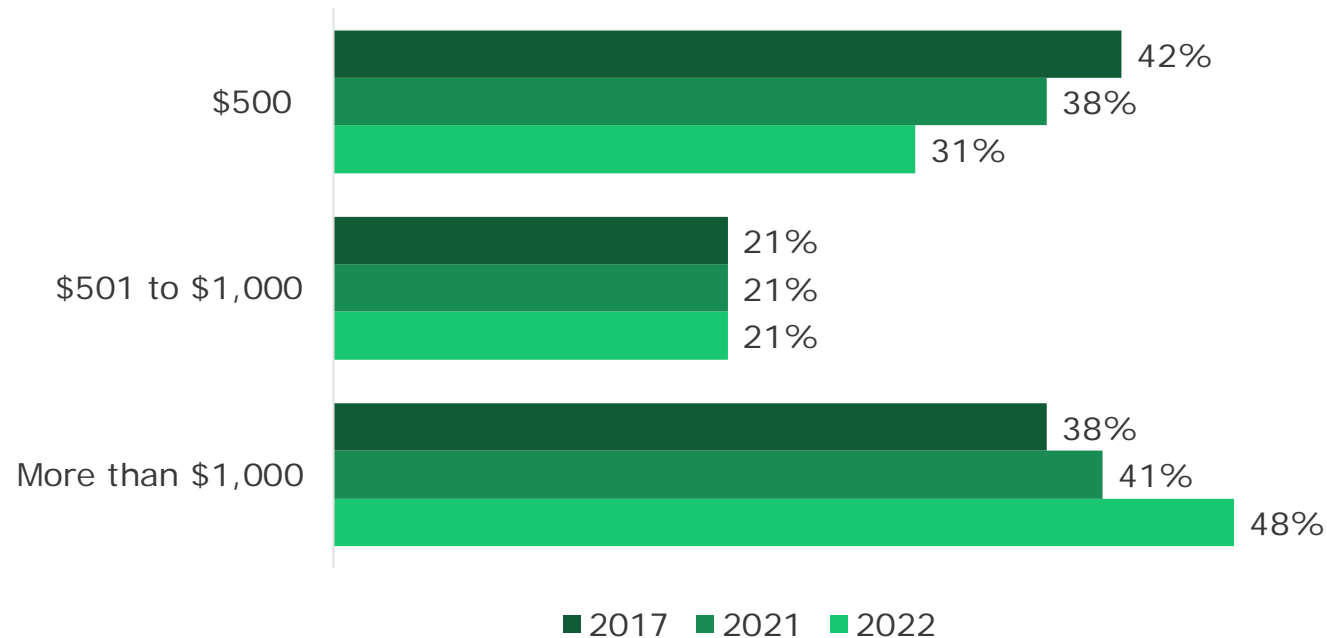


Financial help to learners

- One-quarter received a **discount**
- 21% received a **scholarship**
- 16% received **free textbooks** or textbook free program
- 14% have a **locked-in tuition** rate

INFLUENCE OF SCHOLARSHIP

Q: To what extent would an annual scholarship have swayed you to enroll in one school over another?



Scholarship inflation

- Micro-scholarships still have influence, but students are expecting higher amounts of support.
 - In 2017, \$500 would sway 42% of learners, but just 31% in 2022.

ONLINE STUDENTS' VIEWS OF REMOTE EDUCATION ARE AT AN ALL-TIME HIGH

Key finding 5



POST-PANDEMIC BOUNCE

Q: How did/do you view online learning?

Prior to the pandemic



Currently



■ Positive opinion

■ Negative opinion



A VALUABLE EXPERIENCE

Q: How strongly do you agree or disagree with the following statements?

My degree is very important in helping me achieve my career goals



I feel that a college degree can lead people to better jobs



My online program is worth my time



My online program is worth the cost



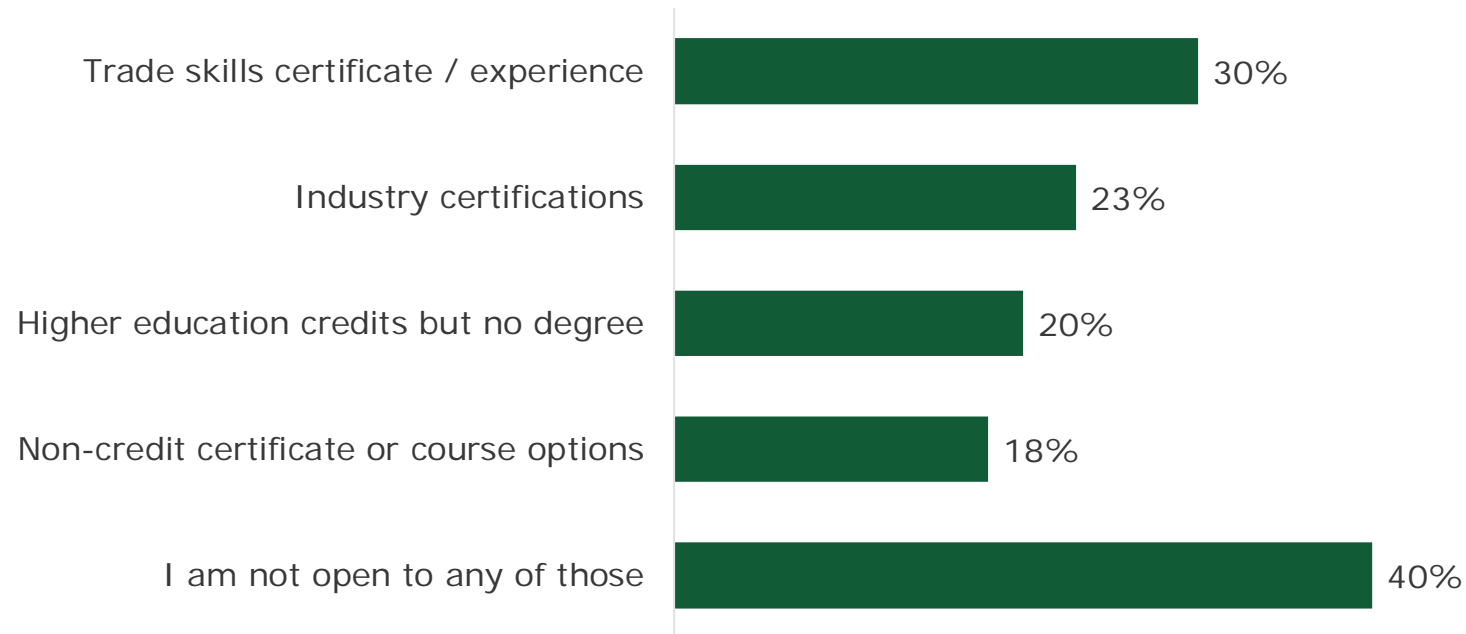
■ Agree/Strongly agree ■ Neither agree nor disagree ■ Disagree/Strongly disagree

Online Learners Value Their Degrees

- In a time of declining enrollments, online learners continue to see the importance of their degree.
- Of current students and recent graduates, **87% report achieving and outcome** they attribute to their degree.
- Though the vast majority still agree, the financial cost of higher education still lags behind stronger sentiments of intrinsic value.

FUTURE OPPORTUNITIES

Q: Are you open to pursuing any of the following non-traditional degree alternatives in place of a college degree?



FINAL TAKEAWAYS



ACTIONABLE TAKEAWAYS

Steps are outlined, based on data from the report, on how to grow and support online learners:

- ☐ Learn more about your pandemic-era learners' needs
- ☐ Build long-term relationships with alumni
- ☐ Consider targeted, high-impact synchronous opportunities
- ☐ Foster relationships with employers
- ☐ Focus on digital marketing channels

Our final report contains a checklist with multiple datapoints and actions for each of these items.

We feel these takeaways can improve how prospective learners find your programs and ensure you current and future learners graduates and accomplish their goals.



QUESTIONS?



THANK YOU!

- Download the slides in the app!
- Visit us at our booth!
- Check out additional free resources at **universityservices.wiley.com/resources**
- Follow us on social media to keep the conversation going!
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Email questions to:

universityservices@wiley.com