

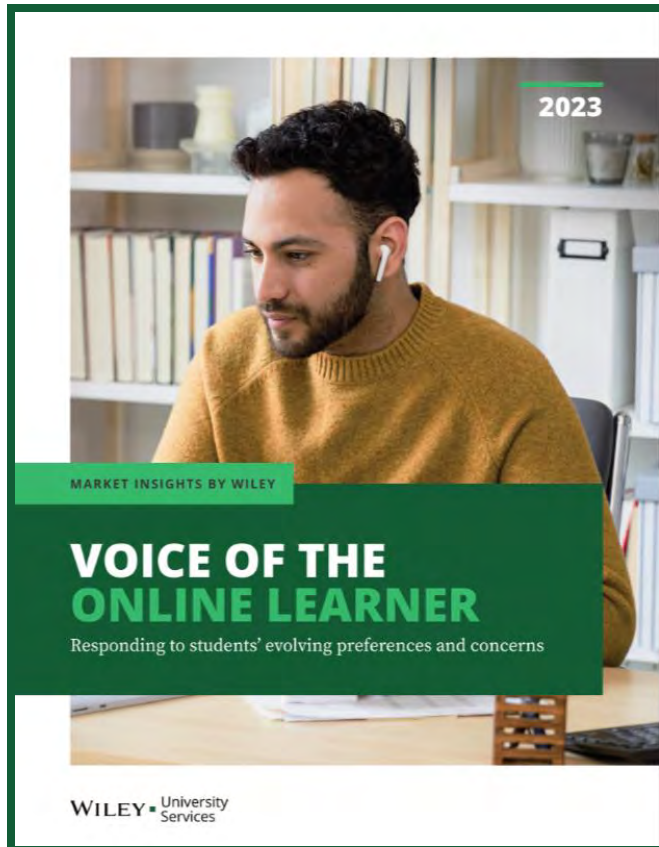
2023

VOICE OF THE ONLINE LEARNER

Responding to graduate students'
evolving preferences and
concerns



METHODOLOGY



Audience:

- US post secondary online learners
- Prospective students
- Current students
- Recent graduates

Survey Size: over 2,600 responses

Deployment: Spring of 2023

Questions focused on understanding:

- What they were seeking in a program
- How they chose where to study
- How they viewed scholarships and tuition discounts
- Their preferences in program format, schedule, and location

Less than a +/-2% margin of error at 95% confidence level based on NCES estimate of 5.7 million exclusively online learners

METHODOLOGY

- Graduate students represent **17% of all college enrollment** in the Fall of 2021
- Graduate students represent **23% of online enrollments**
- Graduate students represent **60% of the Voice of the Online Learner** survey

Source: National Center for Education Statistics

WHAT STUDENTS KEEP SAYING



Modality comes first



They prefer to stay local



Students are price sensitive but value quality



Career goals motivate online learners

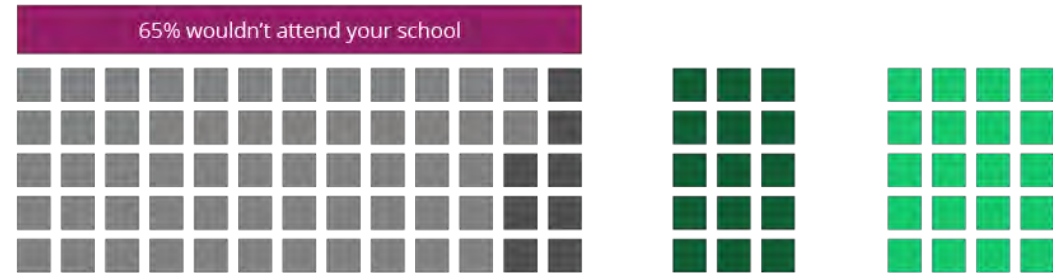
MODALITY COMES FIRST

If the program you wanted was not available in an online format at your school of choice, would you most likely:

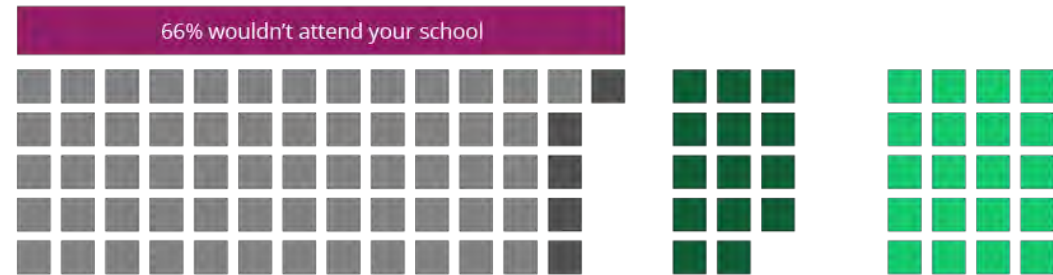
Four out of five learners told us they selected the online modality before any other criteria, including school and program



2023



2021



- Find the program online at a different school
- Not enroll in a program

- Enroll in a different program online at the same school
- Enroll in the on-campus program at the same school

THEY PREFER TO STAY LOCAL

How far do you live from the closest campus/service center of the school in which you enrolled/plan to enroll?

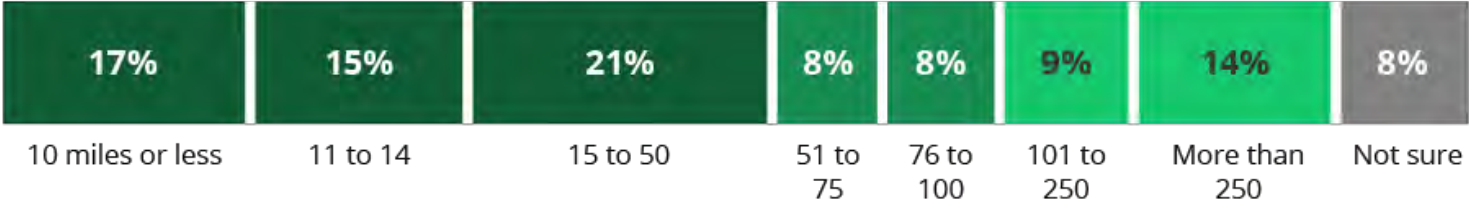
2012



2018



2023



Consistently, roughly half of students come from less than 50 miles away.

TODAY'S FOCUS AREAS

Synchronous
Learning

Certs and
Stackables

Admissions
Roadblocks

Mobile
Learning

Price
Sensitivity

SYNCHRONOUS LEARNING CONTINUES TO APPEAL TO ONLINE LEARNERS



IDEAL ONLINE PROGRAM DESIGN

Student Preferences

- ✓ Fully Online (71%)
- ✓ Asynchronous (71%)
- ✓ Option to take multiple classes at once (63%)
- ✓ Flexibility to choose electives (59%)



ATTITUDES ABOUT LEARNING ON MOBILE DEVICES



CELL PHONES ARE THE CLASSROOM

| Would/Did you use a mobile device for the following? | Prospective learners who would like to use a mobile device | Current and recently graduated learners who used a mobile device |
|--|--|--|
| Checking grades, due dates, or course schedules | 72% | 66% |
| Completing digital readings | 51% | 45% |
| Completing video or other multimedia learning | 56% | 45% |
| Communicating with professors | 56% | 45% |
| Communicating with other students | 52% | 35% |
| Researching additional information | 45% | 32% |
| Participating in a discussion | 42% | 31% |
| Completing practice activities | 44% | 30% |
| Completing graded activities | 35% | 29% |

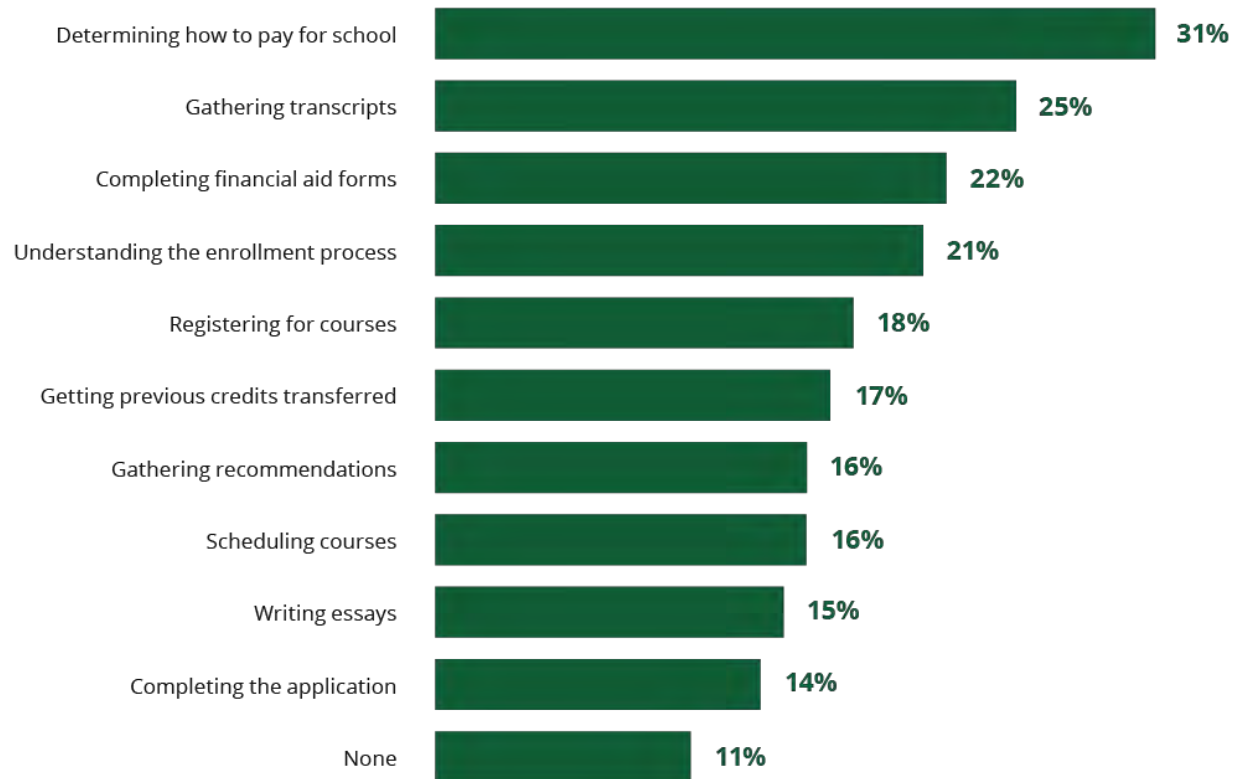
48% of prospective students reported wanting to complete most, if not all, of their course-related activities on a mobile device

ONLINE LEARNERS FACE ADMISSIONS ROADBLOCKS



ADMISSIONS ROADBLOCKS

What was the most difficult part of your admissions process?

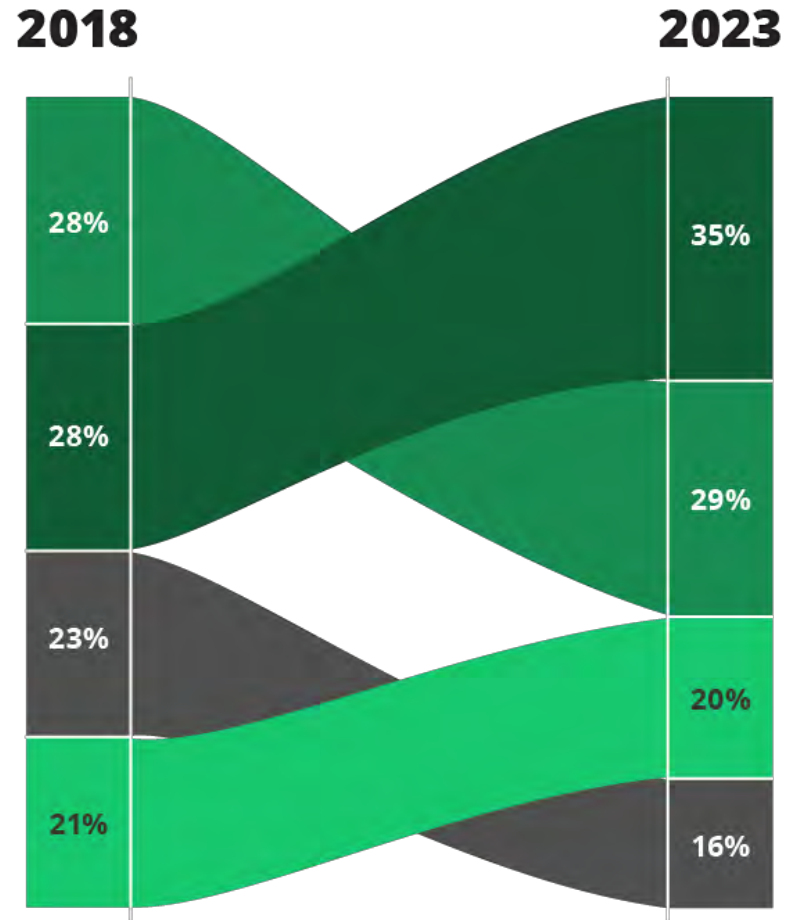
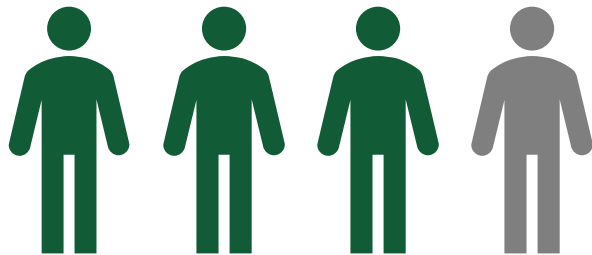


STUDENTS SEEK MORE COMPETITIVE PRICING OPTIONS



CONCERNS ABOUT AFFORDABILITY

Three out of four students say affordability was the most important factor in evaluating a program



Tuition for my preferred program is higher than some, but the program's convenience and its format, schedule and location are ideal for me.

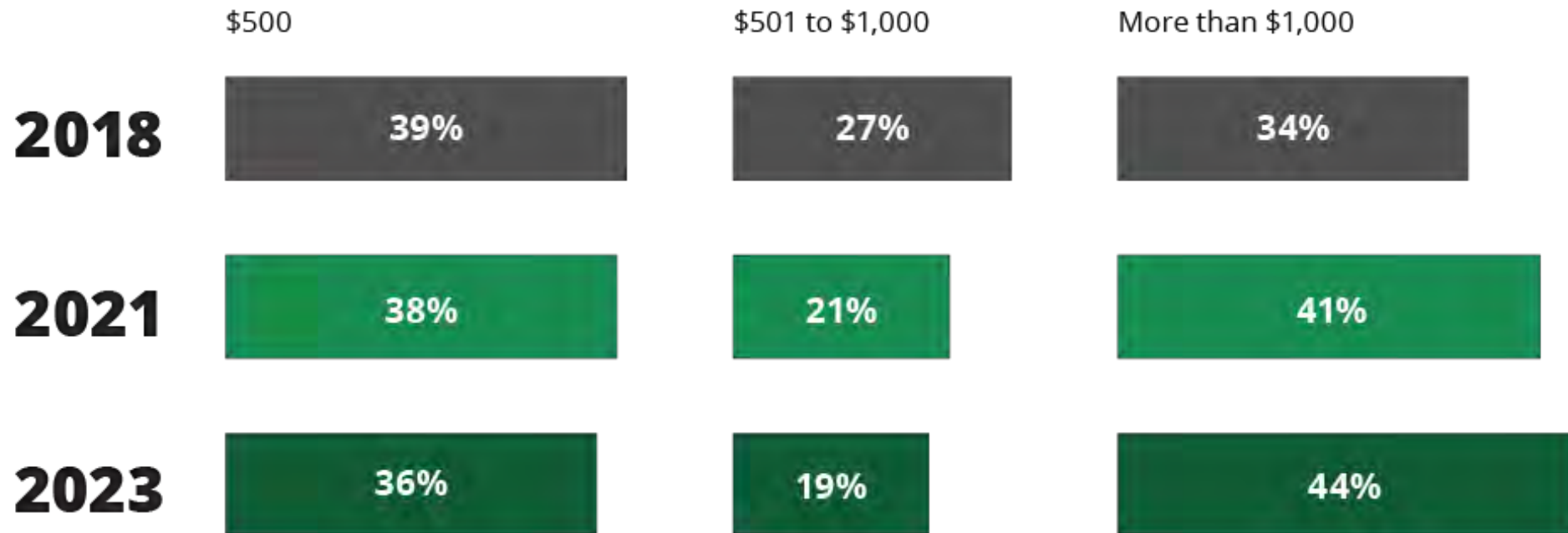
Tuition for my preferred program is the lowest among the programs I evaluated

Tuition for my preferred program is higher than some, but the content is what I want.

The school and the program I choose have the best reputation regardless of tuition.

INFLATION HITS SCHOLARSHIPS

The minimum scholarship that would have impacted a learner's decision to enroll in one school over another

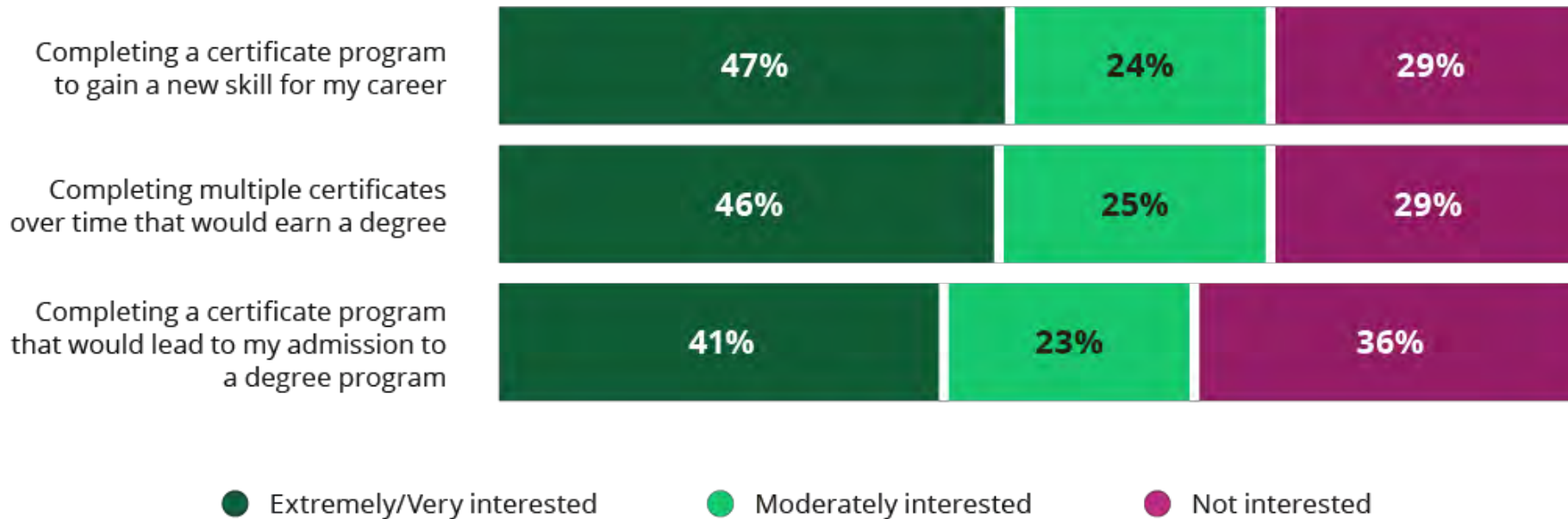


**LEARNERS ARE
OPEN TO
CERTIFICATIONS
AND DEGREE
ALTERNATIVES**



CERTIFICATES AND STACKABLES

How interested would you be in the following certificate options if they were available in your subject area of interest, but you couldn't use financial aid to help pay for them?



Nearly half (47%) of respondents said they're likely, or very likely to go back to the same institution for another program.

OPENNESS TO DEGREE ALTERNATIVES

Students

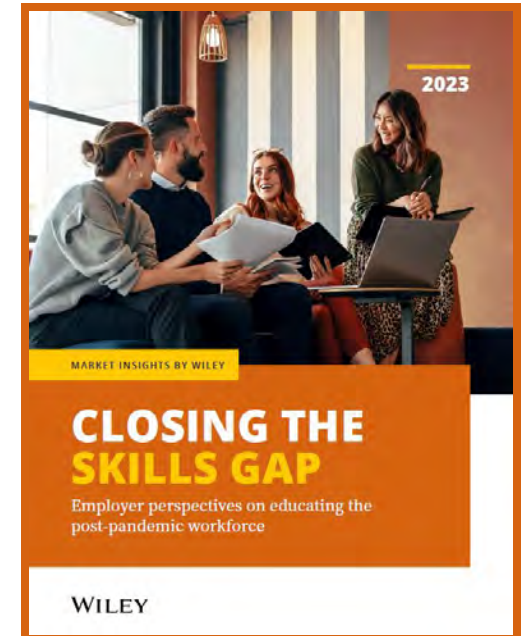
Are you interested in pursuing any of the following non-traditional degree alternatives in place of an advanced degree?

| | |
|-----|--|
| 35% | Trade skills certificate/experience |
| 29% | Industry certifications |
| 25% | Higher education credits but no degree |
| 20% | Non-credit certificate or course options |

Employers

What credentials is your company most open to using to validate skills overall?

| | |
|-----|-------------------------|
| 51% | Industry certifications |
| 45% | College degrees |
| 40% | College certificates |
| 37% | Project portfolios |
| 33% | Skills bootcamps |
| 20% | Badging |
| 9% | MOOC certificates |



ACTIONABLE TAKEAWAYS

The report also contains a checklist with multiple suggested actions and discussion topics for your teams to address:

- Alleviating online learner's concerns throughout their journey
- Re-engaging former stopouts as they return to higher education
- Removing barriers for alumni to return to school
- Identifying ideal areas for innovation and consistency



THANK YOU!

- Check out additional free resources at: universityservices.wiley.com/resources
- Follow us on social media to keep the conversation going!



Email questions to:
universityservices@wiley.com