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

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

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

- 65% wouldn't attend your school
- 66% wouldn't attend your school

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Less than 50 miles</th>
<th>50 to 100</th>
<th>More than 100</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>44%</td>
<td>16%</td>
<td>30%</td>
<td>10%</td>
</tr>
<tr>
<td>2018</td>
<td>66%</td>
<td>12%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>2023</td>
<td>17%</td>
<td>15%</td>
<td>21%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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%)

Most respondents still prefer asynchronous learning; however, attitudes seem to be changing.
ATTITUDES ABOUT LEARNING ON MOBILE DEVICES
# CELL PHONES ARE THE CLASSROOM

Would/Did you use a mobile device for the following?

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

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
What was the most difficult part of your admissions process?

- Determining how to pay for school: 31%
- Gathering transcripts: 25%
- Completing financial aid forms: 22%
- Understanding the enrollment process: 21%
- Registering for courses: 18%
- Getting previous credits transferred: 17%
- Gathering recommendations: 16%
- Scheduling courses: 16%
- Writing essays: 15%
- Completing the application: 14%
- None: 11%
STUDENTS SEEK MORE COMPETITIVE PRICING OPTIONS
Three out of four students say affordability was the most important factor in evaluating a program.

- In 2018:
  - 28% said tuition for their preferred program is higher than some, but the program's convenience and its format, schedule, and location are ideal for them.
  - 28% said tuition for their preferred program is the lowest among the programs they evaluated.
  - 23% said tuition for their preferred program is higher than some, but the content is what they want.
  - 21% said the school and the program they choose have the best reputation regardless of tuition.

- In 2023:
  - 35% said tuition for their preferred program is higher than some, but the program's convenience and its format, schedule, and location are ideal for them.
  - 29% said tuition for their preferred program is the lowest among the programs they evaluated.
  - 20% said tuition for their preferred program is higher than some, but the content is what they want.
  - 16% said the school and the program they 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

<table>
<thead>
<tr>
<th>Year</th>
<th>$500</th>
<th>$501 to $1,000</th>
<th>More than $1,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>39%</td>
<td>27%</td>
<td>34%</td>
</tr>
<tr>
<td>2021</td>
<td>38%</td>
<td>21%</td>
<td>41%</td>
</tr>
<tr>
<td>2023</td>
<td>36%</td>
<td>19%</td>
<td>44%</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>Option</th>
<th>Extremely/Very interested</th>
<th>Moderately interested</th>
<th>Not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completing a certificate program to gain a new skill for my career</td>
<td>47%</td>
<td>24%</td>
<td>29%</td>
</tr>
<tr>
<td>Completing multiple certificates over time that would earn a degree</td>
<td>46%</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Completing a certificate program that would lead to my admission to a</td>
<td>41%</td>
<td>23%</td>
<td>36%</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Degree Alternative</th>
</tr>
</thead>
<tbody>
<tr>
<td>35%</td>
<td>Trade skills certificate/experience</td>
</tr>
<tr>
<td>29%</td>
<td>Industry certifications</td>
</tr>
<tr>
<td>25%</td>
<td>Higher education credits but no degree</td>
</tr>
<tr>
<td>20%</td>
<td>Non-credit certificate or course options</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Credential Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>51%</td>
<td>Industry certifications</td>
</tr>
<tr>
<td>45%</td>
<td>College degrees</td>
</tr>
<tr>
<td>40%</td>
<td>College certificates</td>
</tr>
<tr>
<td>37%</td>
<td>Project portfolios</td>
</tr>
<tr>
<td>33%</td>
<td>Skills bootcamps</td>
</tr>
<tr>
<td>20%</td>
<td>Badging</td>
</tr>
<tr>
<td>9%</td>
<td>MOOC certificates</td>
</tr>
</tbody>
</table>
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