
2021

VOICE OF THE ONLINE LEARNER

Amplifying
Student Voices
in Extraordinary
Times



WILEY University Services



VOICE OF THE ONLINE LEARNER 2021

Amplifying Student Voices in Extraordinary Times

A Wiley Education Services Project

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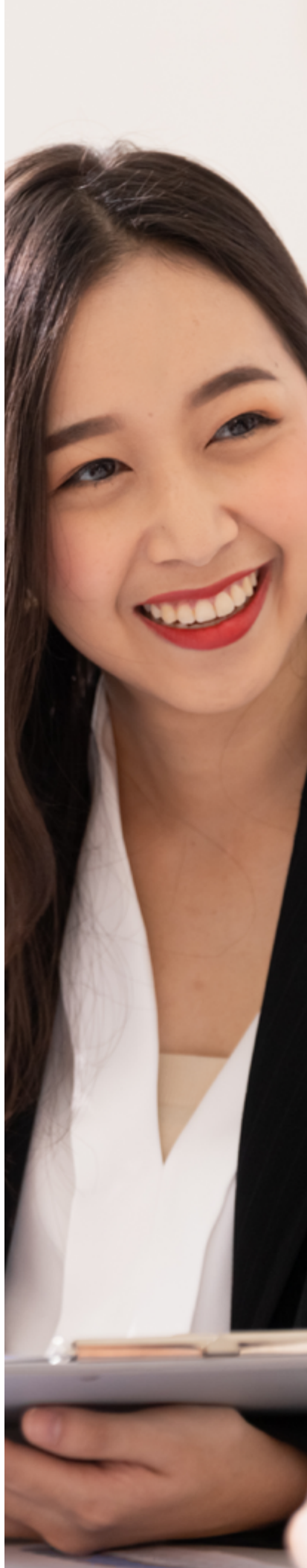
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FOREWORD

This year marks the first edition of *Voice of the Online Learner* and our 10th year surveying online college students. Over the past decade, higher ed leaders referenced *Online College Students* for guidance about serving the unique and developing population of online learners. We are excited to give them a fresh, new iteration of that report, building on our tradition of excellent research and expert insights.

During our time conducting the *Online College Students* survey, we found that online learners are distinct from the learners many higher ed institutions served traditionally. However, the online student population is no longer “emerging.” After years of hearing from this vital segment of students, we’ve gained a keen understanding of the population that we will expand upon in this report and future editions of *Voice of the Online Learner*.

Voice of the Online Learner continues the legacy of *Online College Students* as the market-leading source of insight into online learner attitudes, perceptions, and behaviors, as well as the evolving online education landscape. We have expanded the size of our annual survey to amplify online student voices further, making this one of the largest publicly available reports of its kind, with more than 3,000 respondents.

Through *Voice of the Online Learner*, we can listen to developing trends, such as the growth of a new post-pandemic learner population. Each year, we will highlight developments revealed by our survey and examine the tried-and-true findings we have come to recognize, offering insightful recommendations to our readers. Our year-over-year comparisons and years of extensive research ensure comprehensive data that reflect our investment in boosting the voices of online learners.

We are committed to better understanding the online learner and their experiences through this and other surveys that allow us to listen not only to the voices of students but to educational administrators, faculty, and employers. Our findings represent trends both old and new. We hope this edition of *Voice of the Online Learner* supports you in delivering programs that best fit the needs of learners today and in the future.

Be well.



Todd Zipper, President, Wiley Education Services

KEY FINDINGS

The key findings from this report answer many of the questions regularly asked by higher ed decision-makers. These findings are based on this survey and previous surveys.

HOW HAS THE COVID-19 PANDEMIC SHIFTED THE ONLINE LEARNING MARKETPLACE?

One-third of current prospective students and those enrolled in the 2020-2021 school year had not considered fully online learning before the pandemic.

The COVID-19 pandemic has cultivated a new segment of students who were not interested in fully online learning previously, representing a sizable new source of online learners. When asked if the pandemic changed their feelings about online learning, nearly half of learners said it did not change their views, however half said it changed their feelings for the better. This new segment of students is not identical to the traditional online learner, though, and may have different priorities when choosing a program.

WILL YOUR CAMPUS ENROLLMENT BE NEGATIVELY IMPACTED BY MOVING PROGRAMS ONLINE??

No. Sixty-one percent of online learners stated they would choose an online program at another university before enrolling in an on-campus program.

When asked what they would do if the program they were interested in was not offered online at their school of choice, 75 percent of surveyed online learners stated they would continue to look for an online program either at the same school or another university. These students rely on the flexibility of online learning to pursue higher education. The risk of losing an on-campus student to an online program is much lower than the risk of losing an online student to another school.





WILL YOU ATTRACT STUDENTS FROM ACROSS THE COUNTRY WITH YOUR ONLINE PROGRAMS?



It's unlikely. Sixty-three percent of online learners chose a school within 100 miles of their location.

It is not likely that you'll attract droves of students from across the country for many online programs. Still, some students are willing to look for online programs at universities farther from home. When ranking the most important part of a program, online students ranked their field of study over their university, indicating they may be willing to look elsewhere if nearby higher ed institutions do not provide their program of choice online.

CAN YOU DESIGN AND MARKET ONLINE PROGRAMS THAT WILL APPEAL TO EVERYONE?



No. There is no single correct way to design and market an online program, but popular program elements should be communicated.

Online programs cannot be cookie-cutter in their design because there are features and attributes of online programs that appeal to different learners. No method will work best for all students. For example, even though 70% of online learners prefer back-to-back courses to accelerate their time to completion, 30% of students value short breaks between classes. Similarly, while most online learners wish to complete at least some of their coursework using a mobile device, a significant portion of learners do not want to complete any of their work this way. Higher ed decision-makers need to understand which audience they can reach most effectively and design programs to appeal to their target population. Then, those differences must be communicated clearly in marketing materials to attract the right audience.

HOW CAN YOU BEST MEET THE AFFORDABILITY NEEDS OF ONLINE LEARNERS?



Ninety-four percent of students could be swayed to enroll by a modest scholarship.

Surveyed students are most concerned about affordability and variables affecting the overall cost of a program. A modest \$500 annual scholarship could persuade 38% of online learners to choose one school over another. Nearly 60% could be pulled from one to another for \$1,000 per year, which is less than the cost of one course at many universities. Scholarships and discounts can be powerful tools when attracting price-sensitive students. In addition, changes to the length of a program help meet the needs of online learners because a shorter length can also drive down a program's total cost.

Findings from our 2021 survey led us to the following additional conclusions about online learners and their values.

Ninety-three percent of your students attribute their ability to achieve a goal to their online programs.

Of graduated online students, the vast majority had achieved the desired outcome, such as a salary increase or increased confidence in the workplace. Online learners are motivated by a mix of career-focused and personal goals. Outcomes span several achievements, including salary increases and career changes.

A third of your online graduates want to stay engaged.

Current online students and graduates can be excellent sources of engagement for universities. Nearly one-third of recent graduates follow their schools on social media, and a third have or plan to refer future students to their universities. Around 30% of current learners and recent graduates plan to

take additional courses or enroll in programs in the future. First-generation college students are especially engaged with their universities. Higher ed institutions need to have an engagement plan to reach out to recent and soon-to-be graduates to inform them of learning opportunities and ways to stay connected.

While half of your online students are experienced, they still have concerns you can help alleviate.

The 2021 survey found that 50% of learners have studied online before their most recent endeavor. Still, we discovered there are concerns on the minds of many online learners as they enter their programs, such as a lack of interaction with instructors and fellow students. Online learners are also concerned about how to pay for their programs. Focusing on strong instructor presence and investing in financial services, such as tuition planning, could remedy some fears.



Section 1

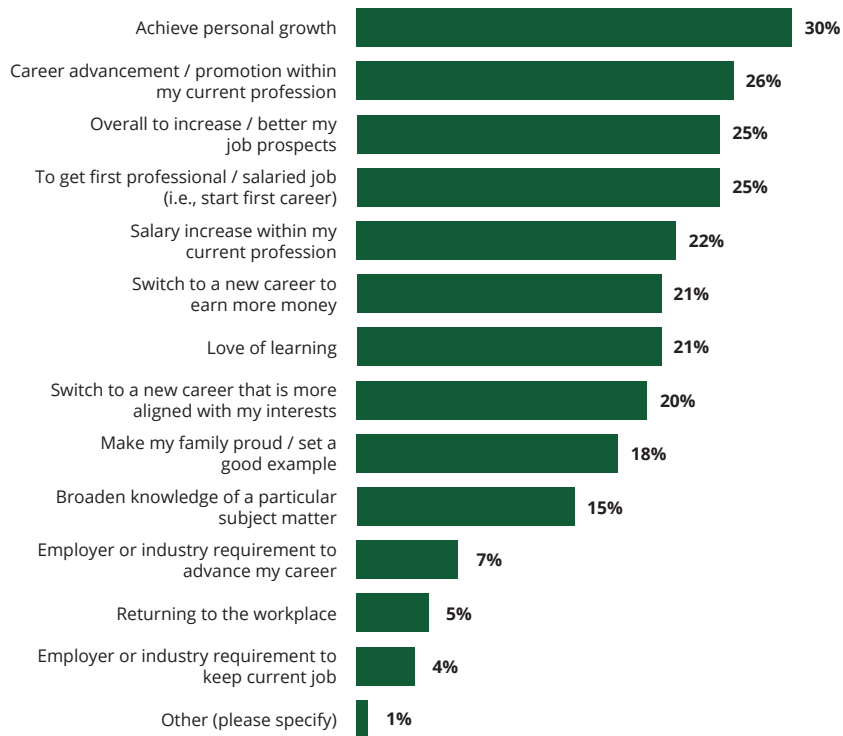
WHAT MOTIVATES ONLINE COLLEGE STUDENTS?

Student Motivations

Many think online learners are only motivated by the practicality and convenience of online education. While practicality and flexibility are still major influencers, the leading motivator for many students is less tangible — 30% of students said the idea of achieving personal growth was an influential factor. Career drivers are also significant motivators when deciding to earn an online degree. Twenty-six percent of learners sought advancement, 25% hoped to increase their job prospects, and 25% wanted to secure their first professional job.

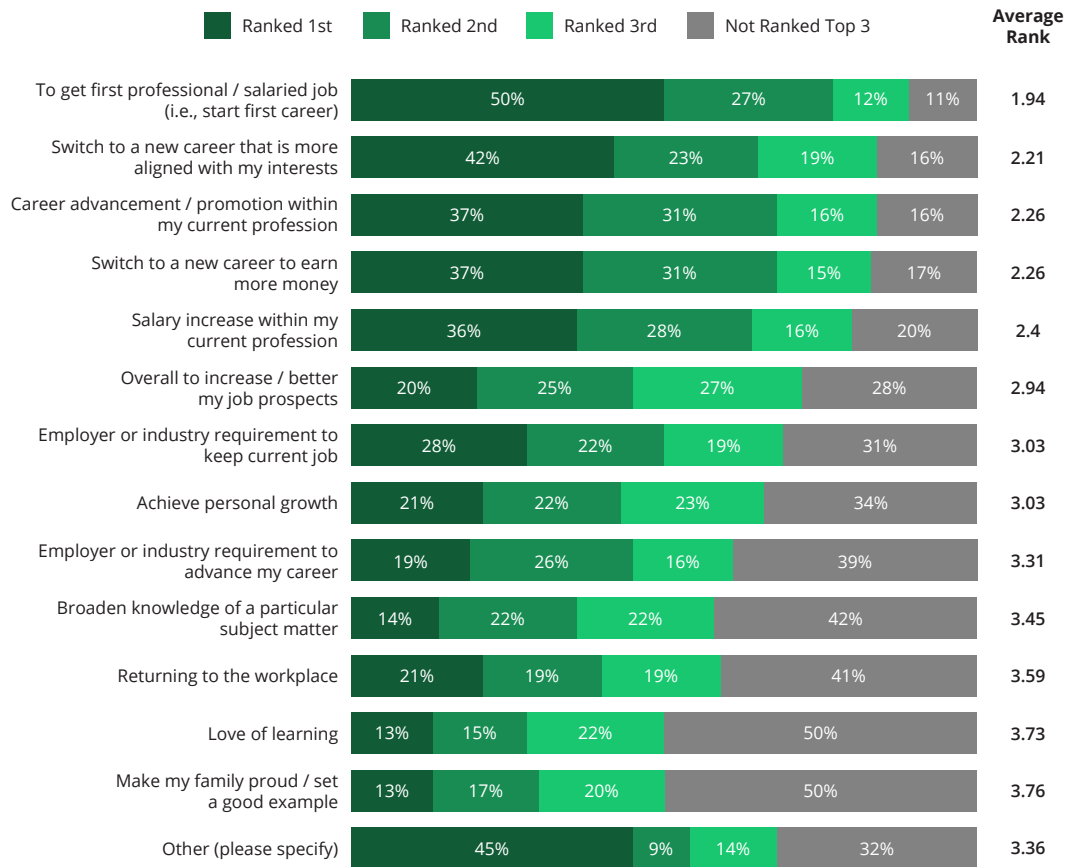
When asked to rank the most influential factors when deciding to attend school, responses become more practical as students said obtaining their first professional job had the most influence. Fifty percent ranked it as their number one factor, and 89% ranked it in their top three.

Please select which of the following factors influenced your decision to pursue a degree. *Select all that apply.*



Of the factors you selected that influenced your decision to pursue a degree, please rank the most important.

Ranked by order of most important. (Current students and alumni)



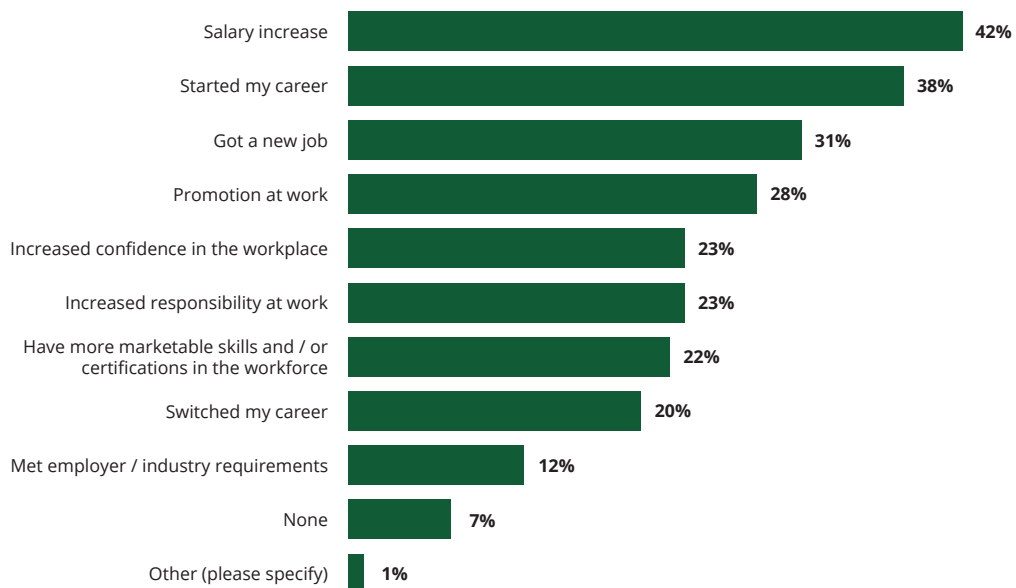
Online Program Outcomes

With personal growth and career motivations in mind, recently graduated online students were asked about changes to their lives attributed to their degree programs. More than one-third of graduates saw their salaries increase, and 38% of online learners started new careers. Thirty-one percent of respondents obtained new jobs. In addition, workplace confidence grew for 23% of recently graduated students, whereas 28% and 23% of students received promotions or new work responsibilities, respectively. Overall, 93% of students had achieved at least one outcome they contribute to their online programs.

There is considerable alignment between the drivers that motivate students to enroll and the successes they later attribute to their programs.



Which of the following occurred during your program or can be attributed to your receiving this degree? *Select all that apply. (Alumni only.)*



The Pros and Cons of Online Learning

The hallmarks of online learning still hold true. Eighty-five percent of students said they enjoy the flexibility, and 78% like the convenience. Fifty-one percent like the quicker time to completion that can come with accelerated online programs.

These benefits may have a tradeoff, though. Thirty percent of online learners noted heavy workloads as a downside of the modality, likely due to shorter semesters. An additional 30% of students pointed to the lack of interaction with instructors as a downside. Twenty-seven percent felt a need for increased self-discipline to keep up with their studies when learning online.

Some concerns are present before online learners even enroll. When asked about their biggest concerns when starting new online programs, 58% of students noted finances, followed closely by work commitments, time management, and family obligations. Although online learning offers flexibility, students are still worried about competing factors for their time. Universities can lessen these concerns by examining and adapting policies to provide additional flexibility where possible.

What are your concerns about online learning, if any?

Select all that apply.

Choice	Total Sample
Heavy workload	30%
Lack of interaction with instructor	30%
Increased need in self-discipline/motivation to complete the course	27%
Lack of interaction with classmates	24%
Quality of instruction	24%
Quality of instructor's feedback	20%
Lack of feedback overall	18%
None	12%
Other (please specify)	2%

RECOMMENDATION

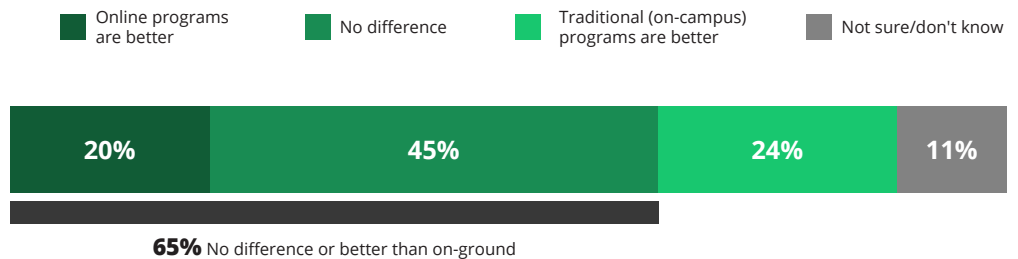
Improvements to the student experience, such as course planning and common course design elements, would remedy many learner frustrations and anxieties. A focus on faculty training and good pedagogical practices can address low instructor interaction and feedback issues and foster collaboration between classmates. Institutional policies regarding common course elements and the structure of syllabi can alleviate concerns about the clarity of expectations and inconsistencies across courses.



Student Beliefs About Online Learning

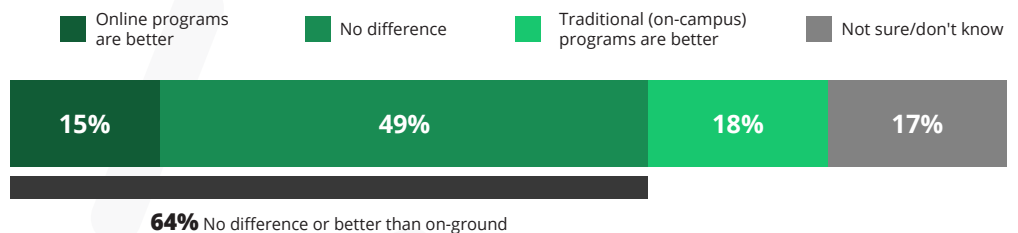
Most students view the quality of their online program to be on par, if not better, than an on-campus program. Forty-five percent report they view no difference with an additional 20% saying they feel their online program is better quality than an on-ground program.

Which of the following do you believe to be true in regards to the quality of education for online programs vs. traditional (on-ground) programs?



Similar beliefs emerged when asking respondents how they thought their employers view the credibility of online learning. Forty-nine percent felt employers do not see a difference in credibility between online and on-campus programs, while just 18% felt their employers view on-campus programs more favorably.

How do you think employers would view the credibility of an online degree?



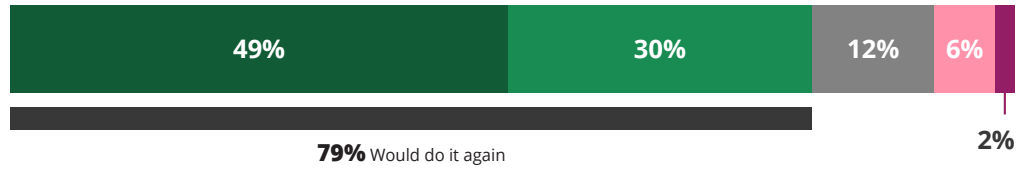
The Value of Online Learning

Online learners were asked how likely they would recommend online learning to a friend or coworker on a scale from zero (not at all likely) to 10 (extremely likely). Fifty-one percent of online students gave online learning a 9 or 10, meaning they would very likely recommend it to their friends or coworkers. Twenty-five percent said 7 or 8, with just 6% saying 0-3.

When assessing the lifetime value of their online degrees or certificates, 93% of online students felt the value their degree provides is equal to or exceeds the cost. Cost is not just the money they paid for the credential but a sum of their time and effort. Seventy-nine percent of current or recently graduated online students said they would take part in online learning if they had to make a choice again.

If you had to do it all over again, would you take part in online learning?
(Current students and alumni.)

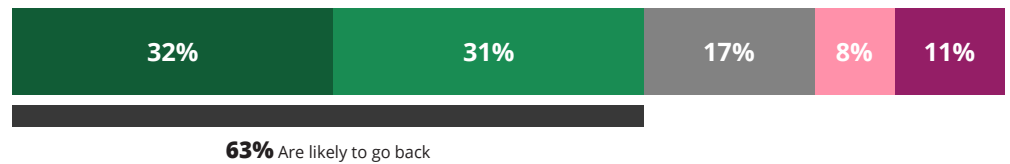
■ Definitely would
 ■ Probably would
 ■ Not sure
 ■ Probably not
 ■ Definitely not



Sixty-three percent of online learners who recently graduated from their programs reported they would likely enroll in an online program again. Fifty percent of surveyed students said they were open to pursuing a non-academic degree alternative, such as a micro-credential or badge.

Now that you received your degree, how likely is it that you will go back to a university/academic institution for another program? *(Alumni only.)*

■ Very Likely
 ■ Likely
 ■ Neither likely nor unlikely
 ■ Unlikely
 ■ Very Unlikely



RECOMMENDATION

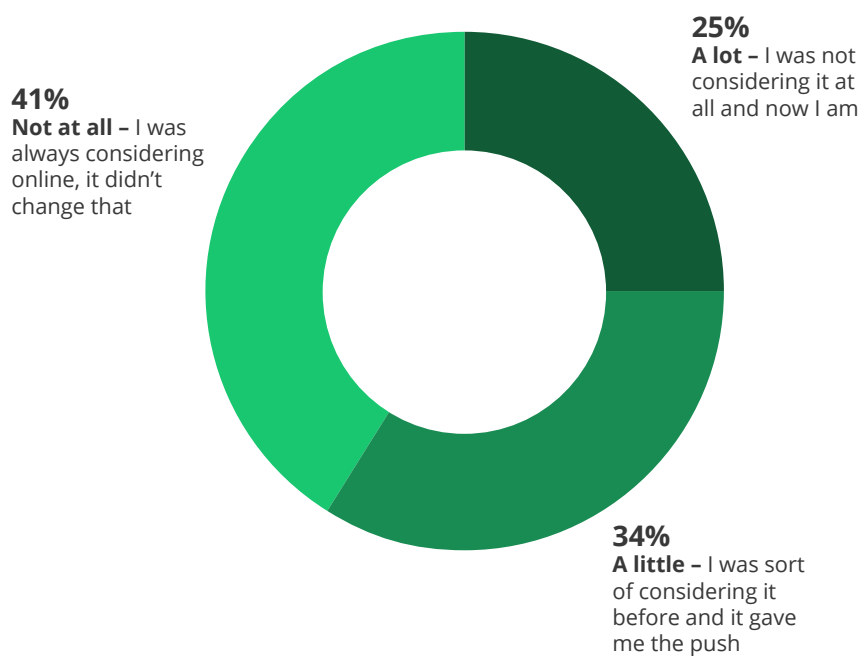
Students have positive experiences in online programs, and their testimonials can help recruit future students. To push the conversation of online learning’s value beyond flexibility and convenience – which students understand at this point – discussions about outcomes achieved and positive experiences need to move to the forefront. Schools should empower these advocates to provide reviews on third-party sites and in relevant marketing materials, as well as highlight the positive outcomes of their online programs by investing in tools to listen to alumni.



The Impact of COVID-19 on Online Learning

The COVID-19 pandemic forced all higher ed institutions to cancel courses or offer courses remotely in the spring of 2020. As a result, millions of students received emergency online learning for which they did not sign up. We asked students who enrolled in the 2020-2021 timeframe or who were prospective online students how much the pandemic impacted their consideration of online programs. One-quarter of prospects and those who enrolled in a program in 2020-2021 said the pandemic had a sizeable impact on their decision and pointed out that they were not considering online learning pre-pandemic, even though they are now. One-third said the pandemic gave them a push to consider online learning.

How much did the pandemic impact your decision to consider an online program? *(For prospects and those that enrolled in 2020-21.)*

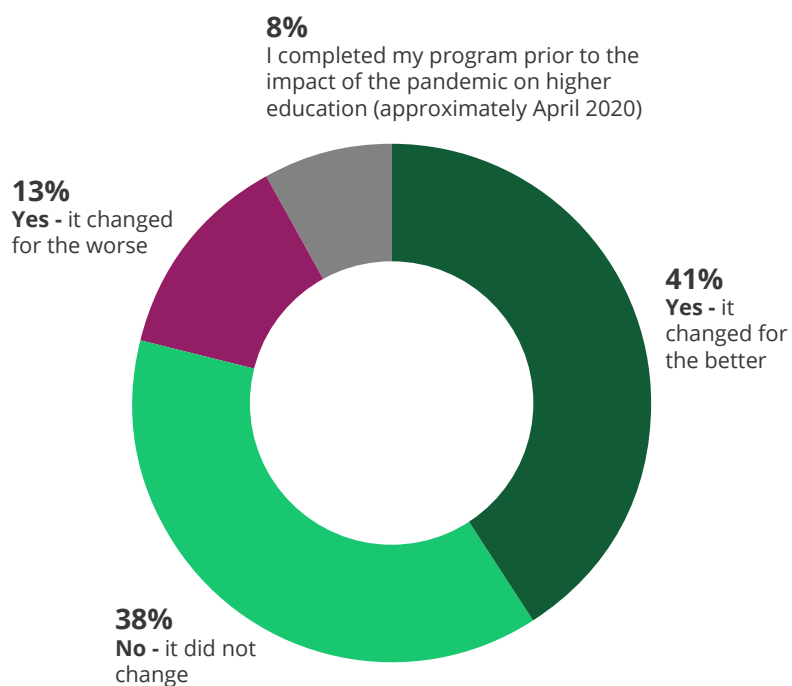


The COVID-19 pandemic increased the pool of prospective students for online learning programs. However, one-third of prospective and enrolled online students in 2020-2021 had not considered a 100% online program before the pandemic.

When asked if the pandemic changed their views of online learning, 42% of learners said it did not change their opinions of the medium, and 51% said they now have more positive views. Emergency remote learning does not appear to have negatively impacted the experience for these learners.

Thirty-eight percent of those enrolled in online learning before the pandemic did not feel the influx of students joining existing online courses impacted their learning experience. Still, 41% said their experience changed for the better.

Did you feel your experience in your online program changed in 2020 due to the pandemic? *(Those that enrolled in 2019 and prior.)*



RECOMMENDATION

The swift move to emergency remote learning at the beginning of the COVID-19 pandemic was criticized in the media with headline-grabbing lawsuits by disgruntled students. There were steep learning curves for all involved, including the administration, faculty who had never taught online, and students who did not intend to learn from home. However, these frustrations do not appear to have had lasting negative impacts. Higher ed institutions interested in expanding their online programs should use the current momentum to create additional online courses and programs, reaching new pockets of students who were not considering learning online previously.



LEARNER SEGMENT HIGHLIGHT:

The Post-Pandemic Online Learner

Due to the impact of the pandemic, more students are considering online learning than ever before, and a new segment of the market is emerging: the post-pandemic online learner.

While the post-pandemic online learner has many of the same characteristics as traditional online learners, some differences stand out. Post-pandemic online learners skew younger and are likely to pursue undergraduate degrees. They are more likely to be employed part time or unemployed. Compared to traditional online learners, they are more motivated to start a career than advance a career. This group seeks job search assistance, resume and portfolio building, and career advising.

When looking at learners who were not considering 100% online learning before the pandemic compared to those who had always considered it, learners who were not are more likely to think on-campus learning is better quality and more credible to employers.

School location is more important to the post-pandemic group than the traditional online learner, and 62% live within 50 miles of campus. Unsurprisingly, these learners are more open to short visits to campus. Fifty-two percent either plan to visit or have visited their campuses. If these students did not find an online program at the school of their choice, they were more open to enrolling on campus. Thirty-six percent of post-pandemic online learners would consider on-campus programs, compared to just 14% of traditional online learners. However, the majority would still go to an online program at a different school.

This group was more likely to avoid programs that did not accept transfer credits. Post-pandemic online learners are less likely to have been enrolled in an online program before, so they are more likely to be concerned with not knowing what to expect, the logistics of being online, and the lack of interaction. This tendency leads post-pandemic online learners to be more open to synchronous components in online settings. They like to keep their options open and apply to more schools than the traditional online group. Fifty-four percent plan to apply to three or more schools, while 61% of traditional online students plan to apply to two or fewer.



Section 2

HOW DO YOUR ONLINE LEARNERS MAKE THEIR DECISIONS?

Desirable Online Program Attributes

Eighty percent of surveyed learners chose to study online before they chose anything else about their programs. While they chose modality first, they considered many other factors before deciding where to enroll. When given options of what was most important – the specific field of study, the general field of study, the university, the modality, or the program’s location – students ranked the specific field of study as their most important programmatic attribute. Just behind that was modality and the general field of study. The university and its location were lower on this list, meaning students are more concerned with how and what they learn than who provides the education.

Please rank the following in order of what was MOST important to you when looking for a program.

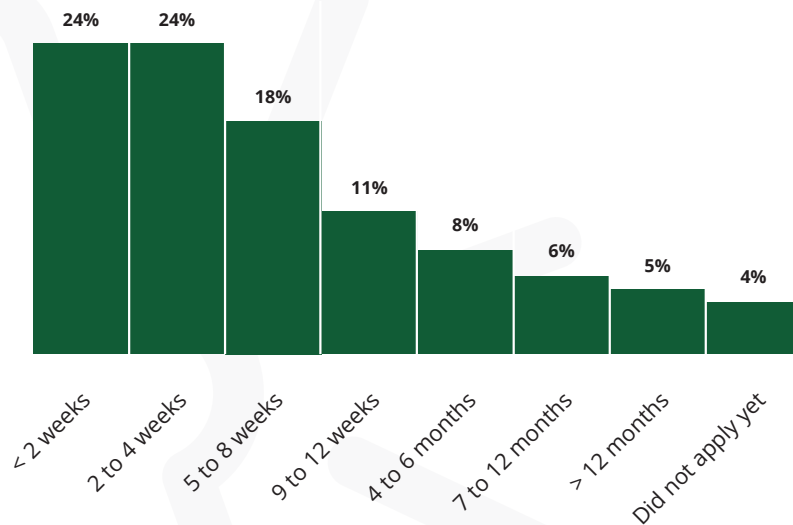
(1 - the MOST important to 6 - the least)

Factor	Avg
Specific Field of Study (for example, special education, accounting, nurse practitioner)	2.45
School / University	3.24
Modality (for example, you knew you wanted to study online over on-ground)	2.74
General Field of Study (for example, education, business, health)	2.91
Location / Proximity to Campus	3.97
Other (please specify)	5.68

Decision-Making Timeline

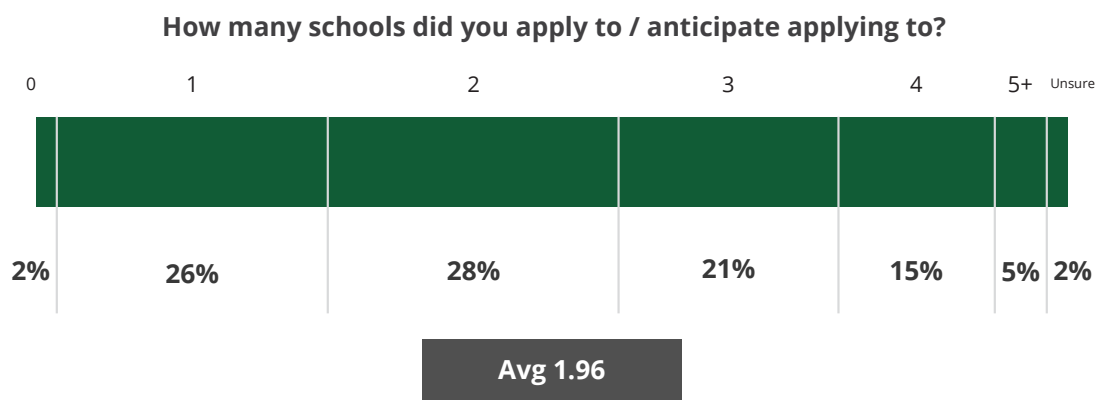
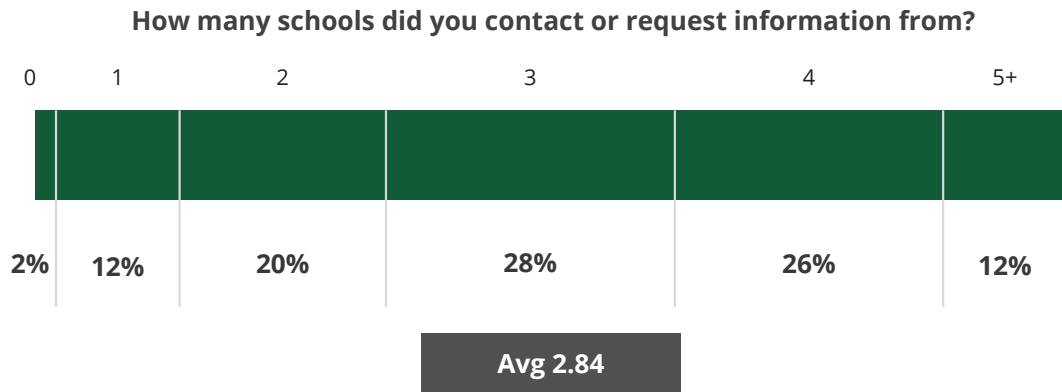
Nearly half of surveyed online learners reported submitting their first applications within four weeks of starting their searches, with half of those submitting within two weeks. Alternately, there is another group that took longer. Thirty-seven percent required more than a month to submit their applications but did so within six months of starting their searches. Eleven percent took longer than six months to submit their applications.

How long did it take you from the time you first started your search for an online program to completing your first application?



Contacting and Applying to Schools

On average, online learners said they contacted or requested information from two or three schools during their decision-making process and then applied to one or two schools. Just over one-third of learners contacted two or fewer, with 54% contacting three or four, and about 10% contacting five or more schools during their searches. Twenty-six percent applied to just one institution, and 49% applied to two or three schools.



When online students reached out to schools during the enrollment process, 77% did so via email and 61% by phone. Nearly one-third communicated through website chats, and over one-quarter reached out through text messages. Almost half of the students who contacted universities reported hearing back within one to two days.

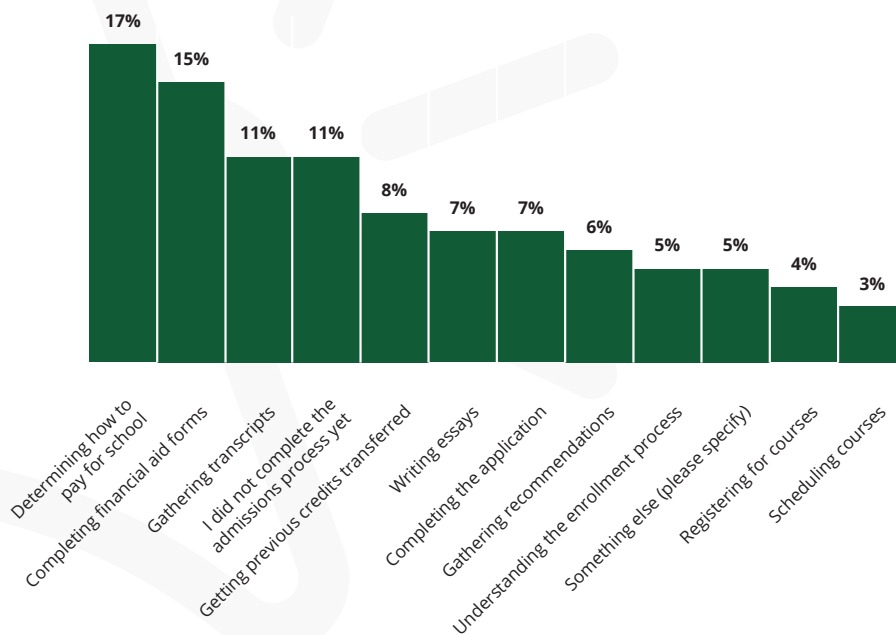
RECOMMENDATION

Once an online learner decides they want to go back to school, they usually want to make their decision and start right away. As they only consider two or three universities and apply to one or two of those, their decision-making process is incredibly targeted. Schools need to respond as rapidly, completely, and personally as possible once a student requests information. Higher ed institutions should make investments to communicate with learners in various ways, including through website chats or text messages.

Challenges During Enrollment

Affordability is essential to online learners deciding where to enroll, so it is no surprise that most students said the most difficult part of the enrollment process had something to do with finances. Seventeen percent said determining how to pay for school was the most challenging part of enrollment, followed closely by completing financial aid forms at 15%. Gathering transcripts and getting past credit transferred to their new programs caused difficulty for around one in ten students. Undergraduate students are likely to be challenged by transfer credit policies and timelines. *Online College Students 2020* found that 43% of online undergraduate students have more than 60 credits to transfer to their next program.

What was the most difficult part of your enrollment process?



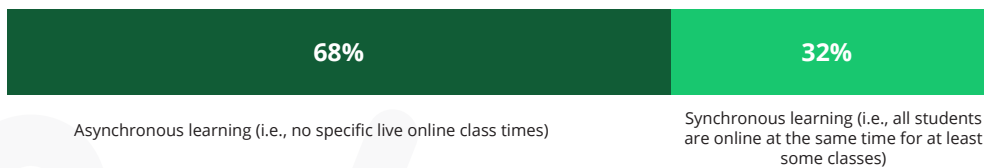
Online Program Design

Online learners are not all the same, so online programs cannot be identical either. Each online program has attributes that attract certain learners. We asked about a series of program features to see which most students prefer.

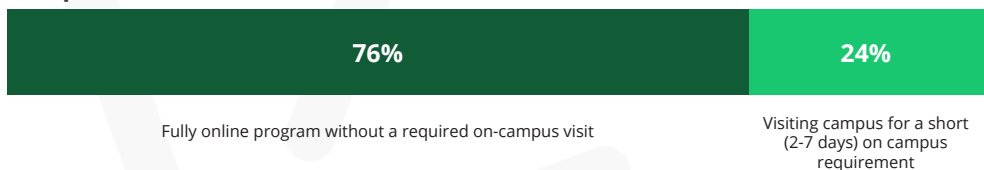
- **87% of students value multiple start dates** per year. They prefer starting their program sooner over having a larger class of peers and fewer start dates.
- **76% of students would choose a fully online program** without on-campus visits instead of one with a requirement to visit for a short residency of 2-7 days.
- **70% would choose to take more than one class at a time** or back-to-back courses to complete their program faster versus having their courses spread out or having breaks between classes.
- **68% would choose a program with an asynchronous format** over synchronous programs.
- **65% of online learners would favor the flexibility to choose or change the course lineup** instead of being in a lock-step cohort or degree plan.

When thinking about the format of a program, which options do you prefer from the following options listed below?

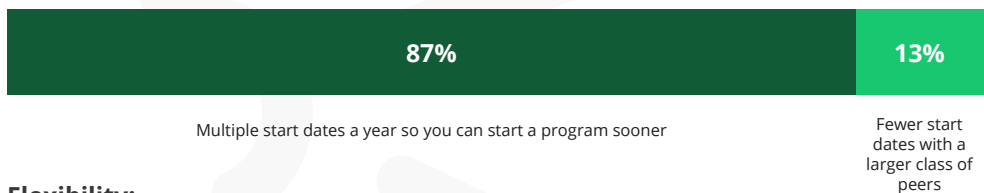
Course Format:



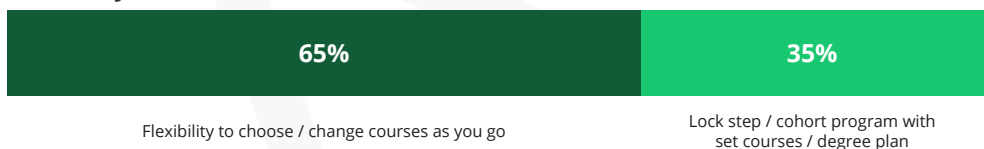
Campus Visit:



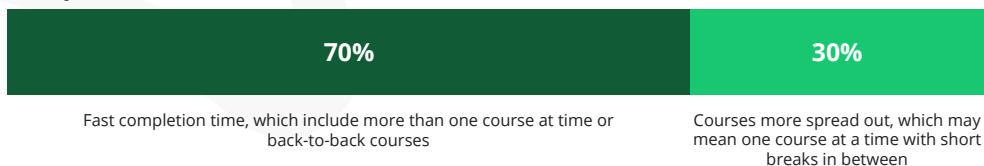
Start Dates:



Flexibility:



Completion Time:

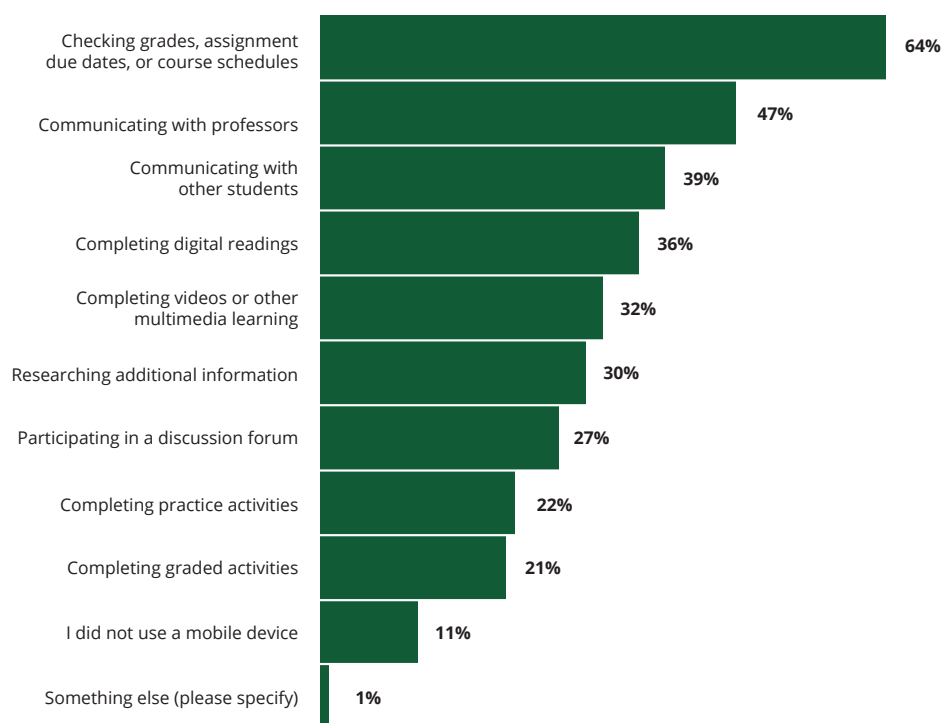


Mobile Devices in Online Learning

Perhaps considered novel or intrusive less than a decade ago, mobile devices, such as phones and tablets, now have a place in the college classroom. For online learners, they may be a portal into the online learning environment. Twenty-one percent of those surveyed said they want to complete all their course-related activities on mobile devices, and 51% would like to use mobile devices to complete most or some of their activities. There is, however, a segment of learners who do not want to use their mobile devices at all, with 27% responding that they want to complete none of their course-related activities through mobile means.

Checking grades and due dates topped the list of what students want to do on their mobile devices at 64%, followed by communicating with professors or classmates at 47% and 39%, respectively. Using mobile devices for class activities, such as participating in discussion forums or completing practice or graded activities, fell lower on the list but still appeals to a significant segment of online learners.

During your online studies, when would you want to use a mobile device (a phone/tablet but not a laptop)? *Select all that apply.*



RECOMMENDATION

There is no single correct way to construct an online program because there's variation in what students want. Higher ed institutions must understand their target markets and design programs that meet their needs. For example, many want to use mobile devices to learn, so being mobile-friendly is essential. However, there is a segment – roughly one-quarter of online learners – that does not want to use mobile devices at all. Similarly, a noticeable portion of students value cohort formats and degree plans versus individual course selection each semester, while most learners do not. These options can be used as points of differentiation and value propositions in marketing and enrollment materials.



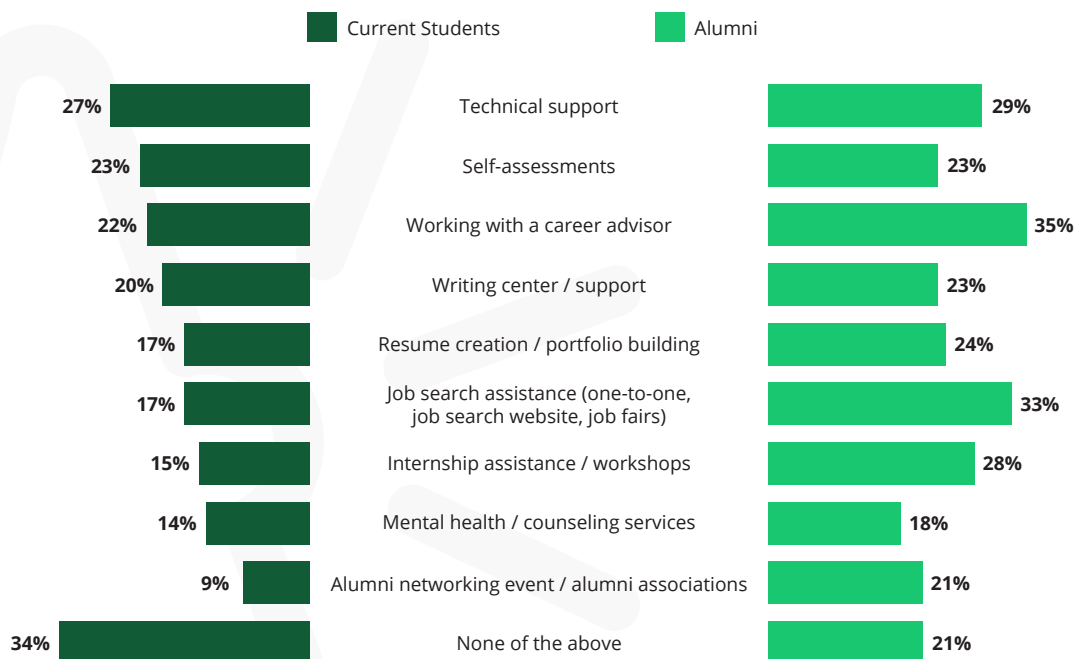
Services for Online Learners

Over two-thirds of prospective online learners plan to use at least one student service. Thirty-five percent plan to work with career advisors, and 33% plan to seek job search assistance from their college. Internship assistance and resume creation services are also likely to be sought by one-quarter or more of prospects during their time as students.

Among current and recently graduated online learners, two-thirds used some form of student services during their time with a university. Working with a career advisor was the most used service amongst alumni with 35% utilizing this service during their studies. This is followed by job search assistance with 33% of alumni utilizing this service.

During your program, did you use the following services?

Select all that apply.



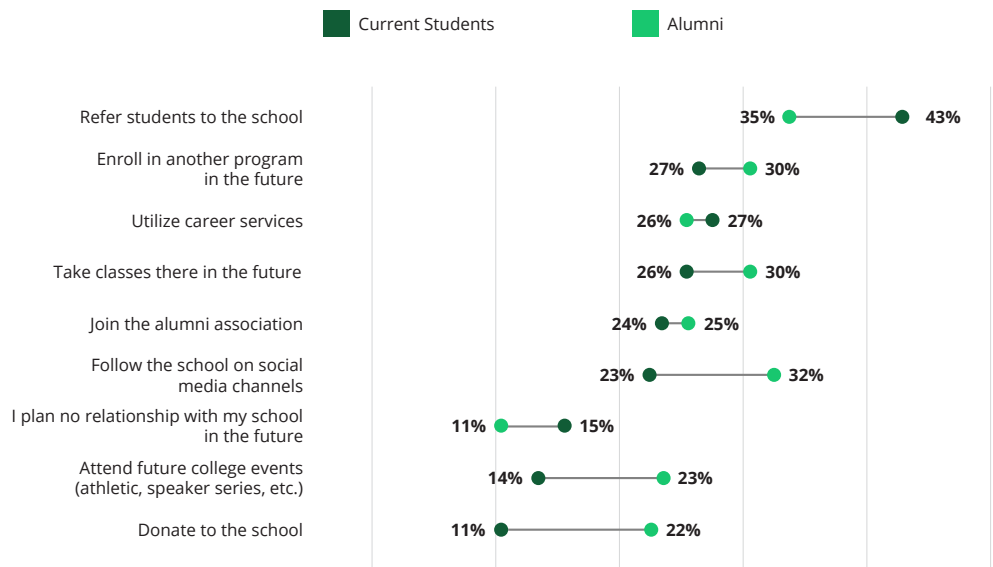
When we asked current and recently graduated online students who used services to rank them by their importance in helping them succeed, working with a career advisor was the highest-ranking, followed closely by internship assistance, technical support, and self-assessments.



Online Alumni Engagement

After graduating from their programs, 43% of current online students plan to refer learners to their universities. Twenty-seven percent plan to enroll in other programs at their current schools, while 26% plan to enroll in more courses. Of those who have graduated, 35% said they have or will refer someone to their schools, 32% follow their schools on social media and 30% plan to enroll in other programs or courses at their universities.

After graduation from your current online school/program, which of the following actions do you expect to take? *Select all that apply.*



Among alumni, 63% said they are likely to enroll in another online program, while 46% of current and prospective students said they would.



RECOMMENDATION

Alumni from online programs want to stay active with their schools once they graduate, either by recommending new students or returning for other programs or degrees. Additionally, career services are popular with students while they are enrolled and after graduation. The COVID-19 pandemic has also highlighted the need for mental health services. Reaching out to recently graduated students with this assistance can be a way to reengage them and showcase future learning opportunities, such as degree programs or short courses.



LEARNER SEGMENT HIGHLIGHT:

First-Generation Online Learners

Nearly one-third of students surveyed were the first in their families to attend college. These learners were less likely to have considered online learning before the pandemic and more likely to believe it is equal to or better quality than classroom learning and equally credible to employers. Often employed full time, first-generation online learners are motivated to switch careers or start new jobs. Being employed makes it more likely for them to rely on employer tuition benefits.

While this group chooses modality first, and most want a fully online program, they are more likely to feel location is important and are more open to on-campus activities. First-generation learners are more likely to have visited campus to connect with classmates or professors, attend class sessions, or participate in student activities than other online learners. They reported finding these visits highly valuable.

First-generation online learners plan to stay connected to their universities after graduating. They are likely to attend future college events, enroll in other programs, take classes, join alumni associations, and donate. They also tend to use student services, such as mental health counseling, job search assistance, and alumni networking.



Section 3

HOW DO YOUR ONLINE LEARNERS PAY FOR SCHOOL?

Essential Factors in an Online Program

Paying for college is a crucial issue for most online students from the very beginning of their journeys. Tuition and fees associated with programs remain among the most important factors for 75% of those considering online programs. Sixty-five percent of learners said time to completion was one of the most important factors. The reputation of the program and its ranking were important to 65% and 53% of online students, respectively.

Fifty-five percent of students selected affordability as their most important factor when deciding where to apply and enroll, followed by the accreditation of the schools or programs and the reputation of the schools or programs.

What are the most important factors in your decision to apply / enroll to an online program?

Choose top 3 factors

Choice	Total Sample
Affordability / Tuition and fees	55%
School/program accreditation	41%
Program concentrations / Specializations within the degree	29%
Reputation of the school / Program	28%
Content of the courses	27%
Quality of faculty	20%
Offered quickest path to a degree / Time to complete the program	18%
Total number of credits / Courses	15%
I can take both online and on-campus courses during my program	13%
Location of the school	8%
Recommendation of people I respect / Family or friend recommendation	7%
The school's mission / Values align with my values	6%
Favorable admissions requirements / No standardized testing requirements	6%
Opportunity for internship or practicum experience	6%
Admissions staff was quick to get back to me	5%
Familiarity with the school / Connection to the school (e.g. alumni, legacy)	4%
Generous policies regarding acceptance of previously earned credit	4%
My employer had a relationship with the school	4%
Other (please specify)	2%

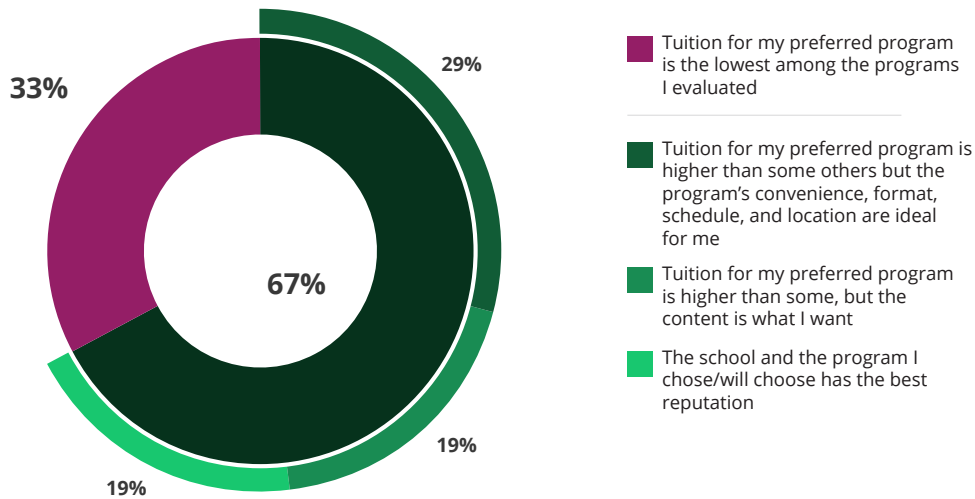
Similarly, when asked the main reasons they chose not to apply or enroll, 39% of online learners stated tuition and fees, followed by requirements to come to campus and a program not having the specific concentration they were seeking.

Learner Attitudes About Tuition and Fees

Tuition and fees were important to 75% of online learners. When diving further into how online learners view the cost of programs, it is critical to understand what can add value from a student's perspective since not every option can be the least expensive. Only 33% of students said they selected the lowest-priced program they explored.

Several factors lead learners to consider a program with higher tuition. Nineteen percent of students said they would be willing to choose a program with higher tuition if it has the best reputation. In addition, if a program's convenience, format, schedule, and location fit a student, 29% would be willing to consider a higher-priced program. Nineteen percent would choose a more expensive program if the content aligned with their needs.

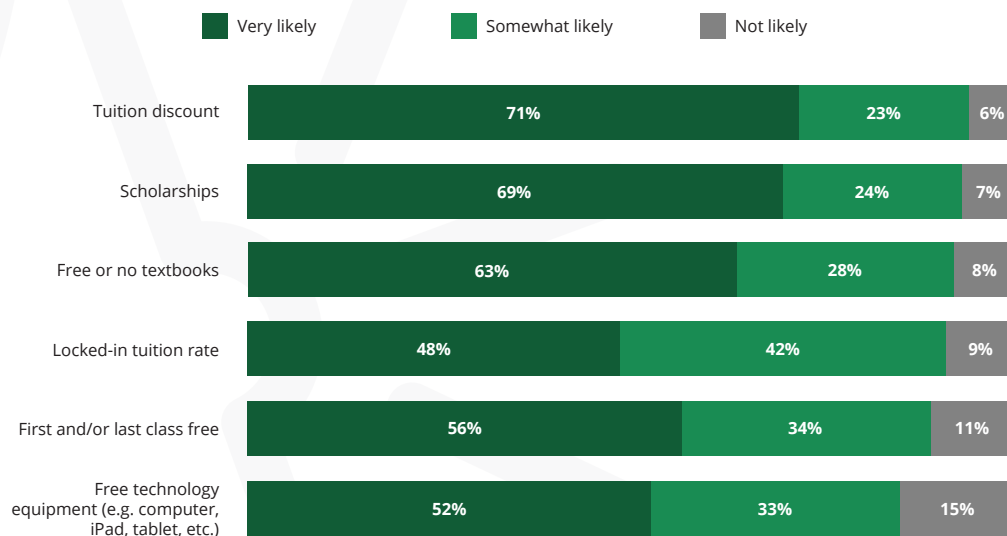
Which of the following statements about tuition is closest to how you did make your most recent enrollment decision?



Payment Options and Discounts

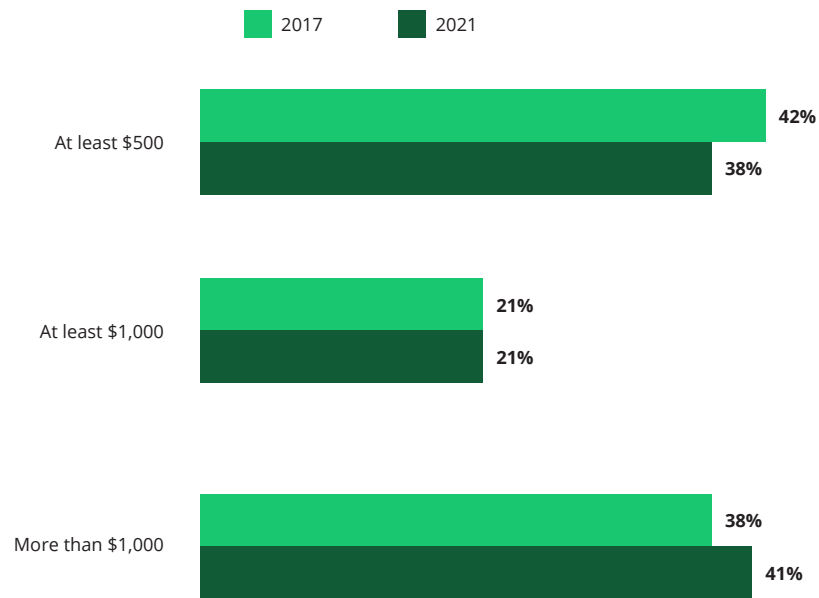
Fifty-seven percent of online students surveyed relied on loans, grants, and other financial aid, and 54% used their savings. With such dependence on funding, it is not surprising that 69% of online learners would very likely choose one program over another for a scholarship, along with 71% for a tuition discount, 63% for free or no textbooks, 56% to get their first or last class free, and 52% for a free iPad or other technology. Most of these promotions yield a much greater return for universities than the initial cost of offering them.

How likely would the following incentives be in swaying you to choose one program over the other?



Small scholarships can have a significant impact on enrollments for online programs. For example, for an annual scholarship of at least \$500, 38% of surveyed online learners say they would choose that school over another. An additional 21% would choose one school over another for at least a \$1,000 annual scholarship. These findings are comparable to *Online College Students 2017*, where 63% of online learners would be swayed to enroll in a program for an annual scholarship of \$1,000 or less, compared with 59% of 2021 online learners.

To what extent would an annual scholarship sway you to enroll in one school over another? *Select all that apply.*




Employer Tuition Benefits

Twenty-four percent of online learners surveyed said they would use employer tuition benefits to help pay for their online degrees, while 63% had access to employer reimbursement. Thirty-three percent received special discounts through their employer.

In *Reimagining the Workforce 2021*, human resources leaders reported that many employees don't take advantage of tuition reimbursement. The report states, "From those surveyed, one-in-five (21%) have seen the use rate of educational benefits at 5% or less among their employees. Just over one-third (37%) have a use rate in the 6 to 10% range."

RECOMMENDATION



Online learners are generally price sensitive. Small scholarships or incentives can sway large percentages of students to choose one school over another, illustrating that students assume a lack of differentiation among universities and programs. Demonstrating the value each university offers students can help counter this assumption. Promoting positive student outcomes, offering courses and content that align with employer needs, accepting transfer credit, developing accelerated program formats, highlighting degree benefits, and acknowledging other indicators of high quality all communicate value to potential students. Universities should work with employers proactively to help students understand their tuition benefits and discounts.



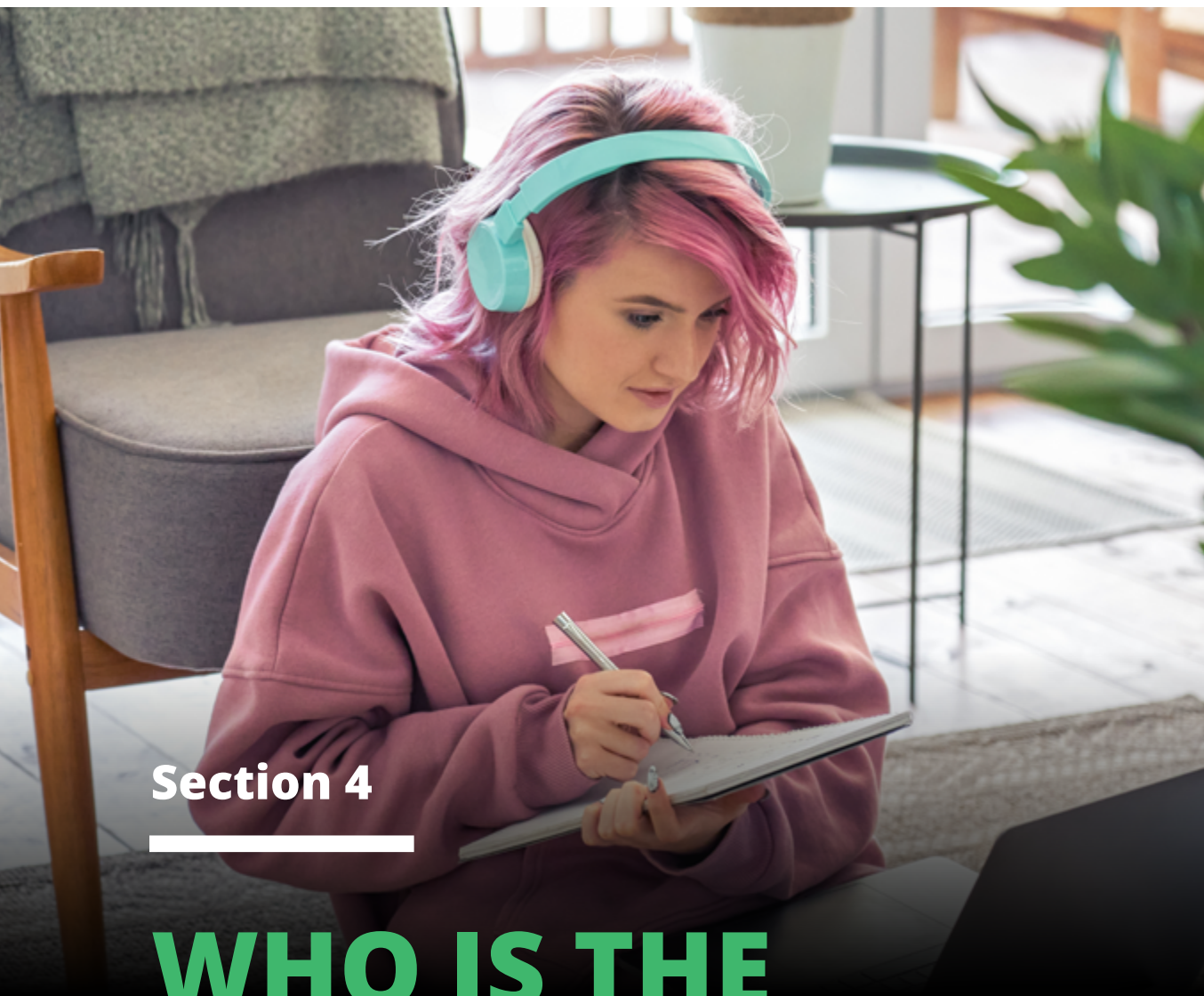
LEARNER SEGMENT HIGHLIGHT:

Learner Motivations and Scholarships

Students who were swayed by \$500 scholarships were more likely to find other financial incentives appealing as well. In addition, learners in this group tend to be first-generation college students and are more likely than others to state that finances were a primary concern when starting a new program.

Learners who were not swayed by \$500 scholarships were less likely to be influenced by other financial incentives. These students were less likely to rate tuition and fees as extremely important in their decision-making, but it is not because they are employed or have higher incomes. They are more likely than the group swayed by scholarships to be 46 years old or older, retired, and less likely to have used employer tuition benefits. They were motivated by personal growth, a love of learning, or broadening their knowledge instead of career goals.

These learners seem to be less committed to online learning and more likely to perceive on-campus learning as higher quality and more credible to employers. In addition, location is less important to them, so if this group did not find programs online at their preferred universities, they were more likely to enroll at other schools. On the other hand, the group swayed by \$500 scholarships was more likely to remain brand loyal and find different programs at the same universities.



Section 4

WHO IS THE ONLINE LEARNER?

Previous Online Learning Experience

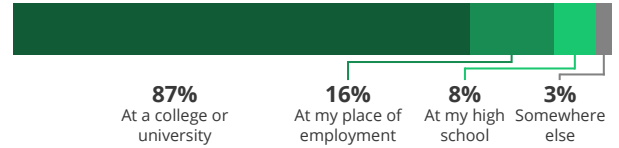
Online learners surveyed were split between those who had enrolled in fully online courses before and those who had not. Of the 50% with a previous online learning experience, 87% enrolled at universities. Sixteen percent had online learning experiences with their employers, and 8% had completed online courses at their high schools. Of those with past online learning experience at a college or university, 55% earned degrees online, 27% completed courses, and 16% finished certificate programs.



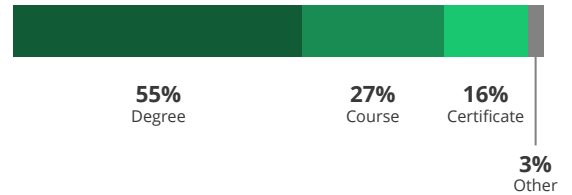
Have you enrolled in any fully online courses or programs prior to this program?



(If yes) Where were these online courses or programs offered? Select all that apply.



(If yes) What is the highest level of online learning you completed prior to this program?



Student Proximity to Campus

Despite online learners ranking the location of their degree program near the bottom of the list in terms of importance, most live close to their campuses. Fifty-seven percent live within 75 miles of their universities, with 28% living within 15 miles. On the other side of the spectrum, 24% live more than 100 miles from their campuses.

With such a large portion of online students living near campus, it is unsurprising that 55% of those who graduated from online programs said they visited their campuses during their studies. Those who visited campus did so to meet with their professors, attend class sessions, or complete other in-person degree requirements. Fifty-seven percent of those who visited said the experience was valuable to them. However, even though those who live close to campus often choose to visit, it's important to remember that a large portion of students will not choose a program if it requires a residency.

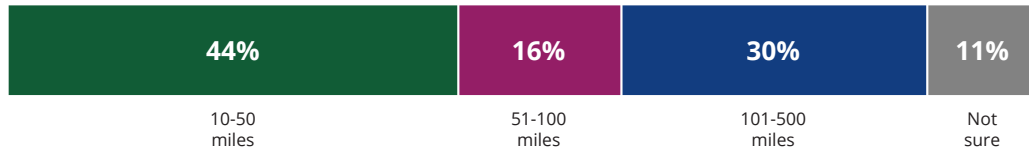
RECOMMENDATION

Students choosing online learning can study in nearly any location they want, yet most prefer universities close to home, possibly because they have studied at them before. When making decisions about where to spend limited resources, such as marketing budgets, location should be considered. Though your programs may have a national reach, they should not necessarily be marketed nationally. Additionally, tying curriculum to local or regional employers can impact enrollments.



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

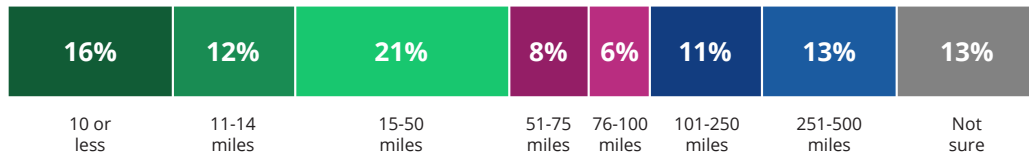
2012



2014



2021



Popular Fields of Study

Online learners are occupation focused and drawn to career-centric programs. Among online learners surveyed, 24% studied education, 23% studied business, and 20% studied social sciences, criminal justice, or law. Those students who told us they were interested in social work were added to the social science category, making it one of the most popular and varied fields of study. Among bachelor's degree students, 25% were interested in business programs, followed by 23% interested in social science programs. At the master's level, there was a statistical three-way tie between education, business, and social sciences.

Demographics

Thirty-one percent of online students surveyed are the first in their families to attend college. Forty-four percent of recently graduated students are first-generation college students compared to 29% of currently enrolled students and 29% of prospects. These students may benefit from additional help in the admissions process as they navigate financial aid and assemble their admissions applications. Once enrolled, they may also take advantage of student services. Seventy-three percent of students surveyed have children, which could explain learners' concerns about flexibility and money. Sixty-eight percent of surveyed students are employed full time, and an additional 15% are employed part time, further indicating that flexibility is a must.

Are you the first in your family to attend college?

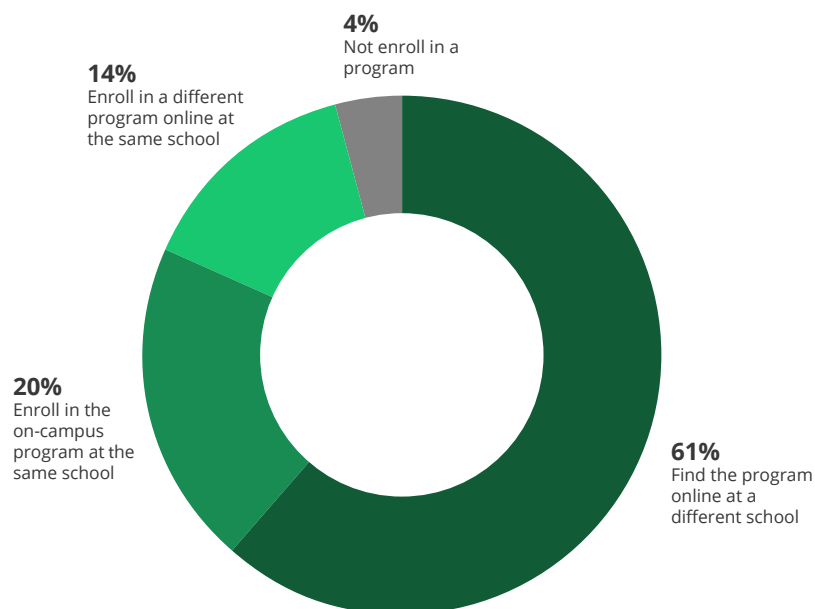
Yes No



The Need for Online Learning Programs

Online learning programs provide convenience and flexibility, often meaning learners do not need to attend campus classes after work or leave their jobs to become full-time students. The increased accessibility means diverse learner populations can pursue higher education. Only 20% of students would consider on-campus learning if their programs were not available online. These individuals likely would not have been able to complete their degrees without online learning. When asked what they would have done if they could not attend their programs online at their preferred schools, 61% of students said they would look for the same programs online at different schools, illustrating the importance of offering a broad portfolio of online programs.

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



RECOMMENDATION

Online learners have many priorities competing for their time and money. Nearly one-third are first-generation college students, and nearly three-quarters have children. With 75% of online learners saying they would continue to search for an online program if their program was not offered online at a particular school, the value students place in the delivery mode cannot be understated. Schools need to service these students differently than campus-based students through enhancing flexibility and accessibility.



LEARNER SEGMENT HIGHLIGHT:

Graduate Students and Online Loyalty

Online learners, in general, choose modality first. Less than 20% would consider an on-campus program. Graduate students are especially modality loyal and are less likely to be open to enrolling on campus. Nearly 80% said if the program they wanted was not available online at the school of their choice, they would choose a different online program.

While more than half of graduate students tend to live within 75 miles of campus, they are much more likely than undergraduate students to live over 100 miles away, indicating they are willing to expand their searches to find the right programs for their needs. They tend to rank location as less important than undergraduate students do and are less likely to visit campus.

Flexibility and convenience are paramount to all online learners but especially important to graduate students. Seventy-nine percent desire a fully online program without a required on-campus visit, and one out of four said they would not enroll in a program if it required time on campus. Graduate students are more likely to be employed full time and express concerns over family and work commitments.



THE FUTURE OF ONLINE LEARNING

This reimagined report is our most recent step in listening to the voice of the online learner and monitoring trends on a larger scale.

In the coming years, we will see the long-term impact of the pandemic on online learning and determine how recent changes will affect higher ed in the future. The COVID-19 pandemic provided more students the opportunity to experience online learning and encouraged companies to experiment with remote working, and learners will continue to demand flexibility. While they are looking farther from home for programs, how these programs meet their needs will be paramount to their decision making.

With the increased popularity of certificates, short courses, and corporate learning, the need for learners to demonstrate their skills and increase their return on investment will grow. We look forward to understanding how learners and employers measure return and how higher ed institutions can differentiate themselves and expand the populations they serve.

Wiley is excited about the future of education. The resilience and innovation demonstrated this past year have been impressive. We anticipate the continued evolution of the marketplace and remain committed to amplifying student voices and incorporating their needs into designing the educational opportunities of tomorrow.

VOICE OF THE ONLINE LEARNER BY THE NUMBERS

Motivations and Attitudes

59%

of prospective online learners and those that enrolled in 2020-21 **said that the pandemic made them consider enrolling in an online learning program.**

63%

of recently graduated online learners said they **are likely or very likely to enroll in another online learning program.**

Affordability

55%

of online learners said **affordability was the most important factor** when deciding where to apply.

33%

selected the lowest-priced program they explored.

Decision-Making

63%

of online learning students **live within 100 miles** of their school.

48%

of online learners **submit their first application to a school within four weeks** of starting their search.

Student Behaviors

75%

of online learners said they **would find another program online if it was not offered online** at their school of choice.

50%

of online learners **have enrolled in a fully online program prior** to their current one.



METHODOLOGY

In the spring of 2021, Wiley Education Services conducted surveys with more than 3,000 individuals nationwide. Respondents were at least 18 years of age, had a minimum of a high school degree or equivalent, and were recently enrolled, currently enrolled, or planned to enroll in the next twelve months in a fully online undergraduate or graduate degree or certificate program.

Graduate students represent 15.4% of the total college population but 29% of the online population. The sample for this survey was weighted to be made up of approximately 66% graduate students to ensure a large enough sample for meaningful conclusions for this significant segment of the online learning market. We combined undergraduate and graduate data unless there were noteworthy differences.

The sample consisted of 3,082 respondents comprised of a national external panel of 1,552 responses and an internal survey of 1,530 prospective, current, and recently graduated students serviced by Wiley partner institutions.

To recruit for the external sample, a panel of consumers from across the nation were asked to participate in an online survey through custom email invitations. Invitations were sent randomly across the U.S. to reflect the basic

population distribution targeting persons 18 or older. Panelists were then allowed to participate in the study if they had participated in or were planning to enroll in a fully online degree or certificate program.

To recruit for the internal sample, a panel of students who had requested information from, applied to, enrolled in, or graduated from a Wiley partner school were invited to participate in an online survey through custom email invitations. The same parameters were used to qualify for the survey as the external sample.

Respondents hailed from all 50 states as well as the District of Columbia and Puerto Rico. The states representing 51% of the nation's population (California, New York, Florida, Colorado, Illinois, Texas, Georgia, New Jersey, Pennsylvania, and Ohio) represented 45% of the study's respondents.

In 2019, 3.45 million higher education students were enrolled in courses exclusively delivered via distance education. Based on these findings, a sample of 3,082 represents an approximate sampling error of +/-1.76% at a 95% confidence level.

Though no survey is perfect, we strived to include as many voices as possible:

Demographic	2021 Voice of the Online Learner Sample	U.S. Higher Education 2019
Male	32%	52.7%
Female	66%	47.3%
White	67%	54.3%
African American/Black	19%	13.3%
Hispanic	12%	20.3%
Asian	8%	7.1%
Under 35	62%	89.9%

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Technical Notes

All percentages in this report have been rounded; therefore, the total percent figure in a table may not add up to exactly 100. Further, if the total percentage is substantially more than 100, the question allowed respondents to choose more than one option.

ABOUT US

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Wiley Education Services is a leading, global provider of technology-enabled education solutions to meet the evolving needs of universities, corporations, and ultimately, learners. We partner with more than 70 institutions across the U.S., Europe and Australia, and support over 800-degree programs. Our best-in-class services and market insights are driven by our deep commitment and expertise—proven to elevate enrollment, retention, and completion rates. For more information, visit edservices.wiley.com.

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Andrew J. Magda is the manager of market research for Wiley Education Services. He leads the development of custom and large-scale market research studies and assists partner institutions with their research needs. Andrew has tracked and forecasted trends in online education for more than 10 years, helping hundreds of institutions determine their unique place in the online marketplace, such as The University of Alabama, Capella University, and Regis University. He has contributed to the writing and analysis of numerous research studies, including nine editions of *Online College Students*. Additionally, he frequently presents research findings at events throughout the country, including conferences for the Online Learning Consortium, National Association of Independent Colleges and Universities, Association for Continuing Higher Education, and WICHE Cooperative for Educational Technologies. Prior to Wiley, Andrew was a senior analyst at Eduventures and a project manager at the Center for Survey Research and Analysis at the University of Connecticut.

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