

2018

ONLINE COLLEGE STUDENTS

Comprehensive Data on Demands and Preferences

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*A joint project of The Learning House, Inc.
and Aslanian Market Research*

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INTRODUCTION

PREFACE

This is the seventh edition of Online College Students, a joint report on the survey of 1,500 past, present, and prospective fully online college students conducted by Learning House and Aslanian Market Research. The purpose of this report is to provide higher education leaders the data they need to best attract, serve, and retain the online college student. Compared to college students who are searching for a campus-based program, online students have unique preferences, needs, and requirements.

Higher education has been experiencing an overall decline in students, but this is not the case for online learning. While overall enrollments have decreased for an unprecedented 12 consecutive terms (National Student Clearinghouse Research Center, 2017), in 2017 alone, online enrollments grew 3% to 3.85 million among fully or majority online learners (Eduventures, 2017). Growth, however, is expected to slow among online students. Eduventures forecasts that the market will plateau at 4 million students for 2019 and 2020 due to an improving economy and a decline in high school graduates.

Colleges and universities attempting to service the online market also face an increased feeling of competition amongst their peers. Nearly 60% of institutions with online enrollments believe that the online program marketplace is “much more competitive” than it was five years ago (Eduventures & Quality Matters, 2017). These underlying trends help fuel debate over the rising financial cost of a college degree and its intrinsic value.

These variables create a dilemma for higher education providers. Should institutions risk buckling under the pressure created by shrinking enrollments and increased competition seen in traditional higher education? Or should they embrace this pressure and move

forward with new innovations and strategies in online education to not only attract and retain current and new student groups, but to contain rising costs and renew their belief in the value of an academic degree?

This report can help institutions identify how to best serve an online audience and stand out in an increasingly crowded marketplace. Although pricing is key, institutions cannot continue to rely on it alone to attract students, as 1) it is not a long-term economically viable strategy, and 2) it inhibits innovation. Programs offered online need to stand out and continue to evolve, incorporating new features that attract and benefit online students. Our survey has found strong interest in programmatic features that can benefit students in the long term, such as the use of open educational resources (OERs) to lower or eliminate the cost of textbooks.

The survey that underpins this report has evolved over time. Certain questions are asked nearly every year, while others that have more consistent responses are rotated in and out to try and identify significant shifts in attitudes and behaviors. We urge colleges and universities interested in serving this unique student population to also review the past six Online College Students reports on our websites.

Please visit learninghouse.com/research and educationdynamics.com/e-books to access those reports.

We hope online leaders will find the following information useful in expanding access and improving the quality of their programs. Recommendations for online programs based on survey findings and our collective experiences are presented in ***bold, italicized text*** at the end of selected sections.

KEY FINDINGS

Below is a summary of key findings within the report.

1. Mobile-friendly content is critical.

Virtually every online college student owns a smartphone or tablet. The overwhelming majority of students use mobile devices not only to search for their online program of study (87%) but also to complete online coursework (67%). Ensuring course content and websites are optimized for mobile is vital for colleges and universities that are pushing to grow and retain their online student population.

2. Online students need career services.

As three-quarters (74%) of online college students are pursuing their program for career-focused reasons, career services are increasingly applicable to their post-graduation success. While 54% of online college students are employed full time, many are looking for career advancement or a new career. Online students reported utilizing services such as working with a career advisor (50%), resume help (48%), and job search assistance (40%). Online access to career services, including opportunities to engage with a counselor or mentor, is an integral part of a high-touch institution's value, and students are taking advantage of the opportunity to achieve stronger outcomes upon graduation.

3. Online learning is providing a positive return on students' investment.

Sixty percent of online college students have completed an online course or program prior to their most recent search for an online program. This experience may lead them to prematurely rush to a decision on a program, as more than half (56%) would change at least one thing they did during the enrollment process. However, even if online students wish they took more time to decide on a program, they still graduate with a positive experience. Eighty-six percent of online students believe the value of their degree equals or exceeds the cost they paid for it. For students who have experienced both in-person and virtual classrooms, 85% feel that learning online is as good or better than attending courses on campus.

4. Online programs are becoming more diversified.

As increasing numbers of students pursue an education online, shifts are occurring in the programs they are seeking. While business and education are still programs of high interest for both undergraduate and graduate online students, they are not commanding the same portion of the market they once did. In 2014, education accounted for 22% of graduate students and business for 28%, while in 2018 they account for only 14% and 21%, respectively. Now, we are seeing increased interest in more diverse fields of study. Particularly in the graduate student segment, areas such as computers and IT (15%), health and medicine (16%), and STEM (11%) have seen steady growth compared to 2014 data. Institutions that diversify their online offerings may be able to take advantage of new segments of students they could not serve previously.

5. Online students support innovations that decrease the cost and time to complete a degree

As online learning has established itself as a valid learning medium, higher education is experimenting with the modality needed to tackle student debt and degree-completion problems that plague the sector. The good news is that students are on board with competency-based education (49% would consider), stackable certificates (43% very interested), and textbook-free courses (61% would consider). As students learn more about these innovations and are ready to embrace them, institutions should consider how bringing these types of new options to the table could impact their reach to potential students.

6. Interactions and relationships with peers are key to online students' success.

Online students may be seeking a “learn at my own pace” educational experience, but that does not mean they want to be devoid of contact with their peers. Fifty-seven percent of past and current online students report that interactions with classmates are very important to their academic success. Online courses should offer opportunities to foster these interactions, however, these opportunities do not need to be held on a frequent basis as asynchronous learning tools such as PowerPoints and videos (58%), textbooks (52%), and written assignments (51%) were also seen as very important to online students' success. It should also be noted that textbooks can be replaced with OERs in the classroom, as 79% of online college students have some level of familiarity with them, and over 60% would definitely be open to an OER course or program in the future.

7. Multichannel approaches to advertising and marketing are necessary to attract online students.

Unsurprisingly, marketing through digital channels resonates with online students. Search engine listings, email, website, and Facebook ads proved memorable for one-quarter or more of the students surveyed. Less predictable was the apparent impact of traditional marketing efforts, such as television commercials (30%), and college fairs (23%). Similarly, prospective students are most likely to visit a college's website (41%) to gather additional information about programs of interest. Online students also utilize traditional, nondigital channels to solicit program information; nearly one-quarter of prospects called schools, and another 16% attended open houses in person (13% attended virtual events). Consequently, it would behoove schools to promote online degrees and make information available through multiple formats.

8. An online degree's value is more than its price.

Tuition and fees continue to be the top factor online college students point to when selecting their program. However, while not every institution can indeed be the least expensive, "affordability" can be demonstrated in many ways outside of tuition rates. Factors that increase the perception of an institution's or program's value include program convenience (28%), institutional reputation (23%), or offering the best content (21%). Implementing even a small annual scholarship of \$500 may sway 39% of students. With the availability of additional benefits tied to attending an institution, most students are willing to pay a slightly higher rate. Furthermore, online college students will point to the importance of a program matching their needs as being the most important factor in their decision, and it seems that a faster completion time can also outweigh scholarships.

9. Online students are bypassing the on-ground classroom for added convenience.

Nearly 60% of online college students who had a choice between online and on-ground actively chose online learning. Online programs have built in many conveniences that on-ground programs often still lack. Opportunities to take year-round courses (27%) and accelerated courses (20%) inform some online students' decisions, while others take advantage of generous transfer policies that ease their time to completion (85% of online learners have prior college credit, with 25% of these students having more than 60 credits, priming them for quick completion of a bachelor's degree).

SECTION 1:

UNDERSTANDING THE ONLINE COLLEGE STUDENT

MOTIVATED BY CAREER

Nearly three-quarters (74%) of online college students are motivated by career reasons for enrolling in a program. Almost one in five (17%) students are transitioning to new careers, 16% are updating their skills for their current job, and 13% are looking for an increase in salary. For those not motivated by career, 17% want the satisfaction of completing their degree, and 7% view higher education as the next step in their education after receiving their high school diploma or GED.

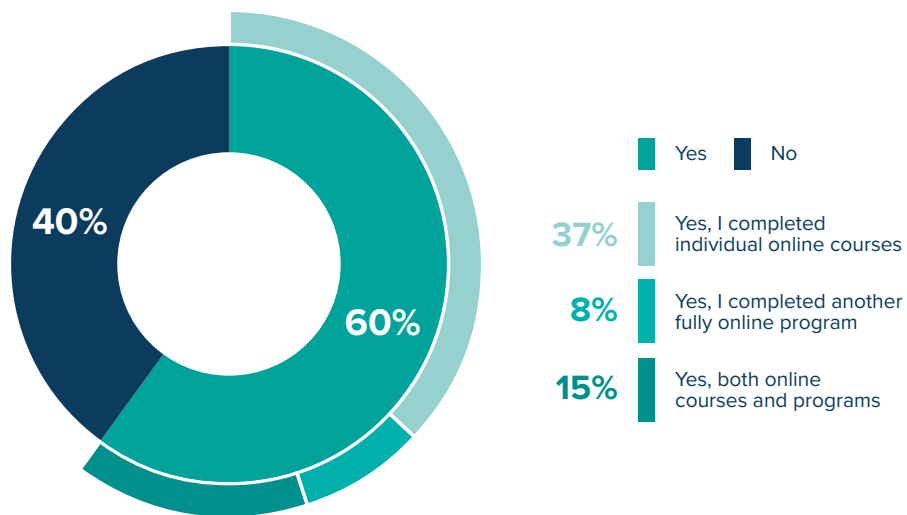
What was your primary motivation for enrolling in further education?	All Students
<i>I wanted to transition to a new career field</i>	17%
<i>I wanted to update the skills required for my job</i>	16%
<i>I wanted to increase my wages/salary</i>	13%
<i>It was required by my employer/profession</i>	10%
The satisfaction of completing my undergraduate education	10%
<i>I was seeking a promotion/new position in my career field</i>	9%
<i>I was unemployed and needed more education to get a new job</i>	8%
The satisfaction of completing my graduate education	7%
I had finished high school/GED	7%
<i>I was working part time and wanted to move to full-time work</i>	3%
Other personal reasons not related to career	2%

**Bold italic denotes the categories tied to career*

EXPERIENCE WITH ONLINE LEARNING

Online learning is not new to the majority of students surveyed. Sixty percent of online learners have enrolled in online courses or a fully online program prior to their most recent online studies. One in four (24%) have completed an online program, and 37% have completed individual online courses. It is interesting to note that the split between undergraduate and graduate students is relatively even.

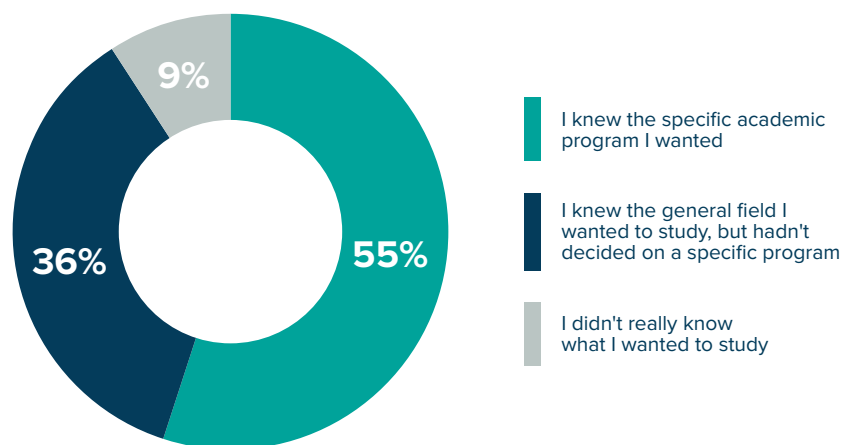
Prior to your most recent online study, had you ever enrolled in fully online courses or programs previously?



KNOWING THEIR PROGRAM OF STUDY

Most students know the specific program they want to study online. Just over one-third (36%) know the general field but not the specific online program. Nine percent know they want or need to go back to school, but they have not narrowed down what they want to study.

When you began looking for your most recent online program, to what extent did you know the specific program in which you wanted to enroll?



RECOMMENDATION:

With 45% of online college students unsure of what program they want to study, enrollment counselors at an institution need to be able to describe all the possible program opportunities for prospective students as well as articulate the additional benefits the institution provides to help undecided students understand what program at the school best fits their needs and why.

FIELDS OF STUDY

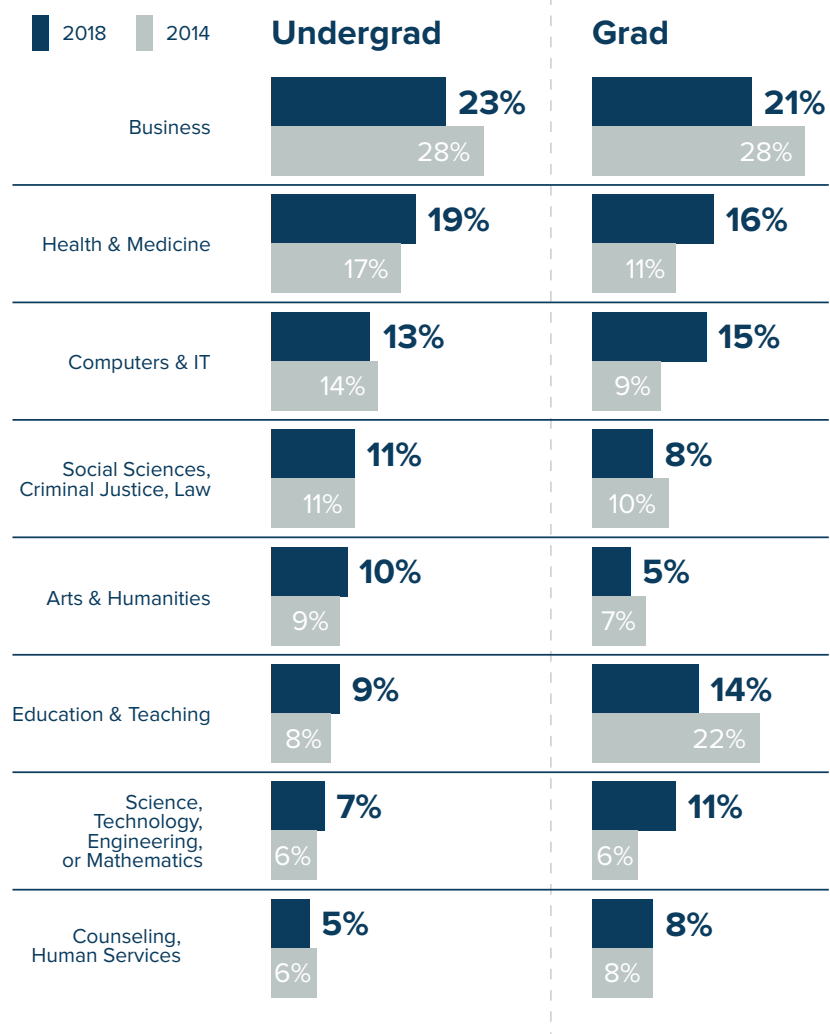
Business continues to be the most popular field sought by online college students. However, business is losing market share to other fields of study at the undergraduate and graduate levels. Education at the graduate level continues to lose a significant share of online students — dropping from 22% in 2014 to 14% in 2018. An important factor in this conversion is that as the online education market has matured and increased in popularity, the number and types of programs have grown as well. On the other hand, online education has always been dominated by practical, career-focused offerings like business and education, which have been strong-performing programs.

Growing fields include computers and IT at the graduate level (up from 9% in 2014 to 15% in 2018), STEM fields at the graduate level (6% in 2014 to 11% in 2018), and health and medicine at the graduate level (11% to 16%). The undergraduate level has seen less dramatic shifts, with health and medicine, STEM, and arts and humanities growing just 1 or 2 percentage points in four years.

Specific fields of study underpinning these larger umbrellas helped to cause some of these shifts. Since 2014, we have seen the business administration degree shed market share at both the undergraduate and graduate levels to other program areas such as computer science. General psychology at the undergraduate level has also shrunk, with the more specialized field of child psychology gaining market share. At the graduate level, a similar trend is seen in nursing, with the more general MSN ceding market share to nurse practitioner and family nurse practitioner programs. Education programs such as elementary education and curriculum and instruction appear to be giving way to the growing momentum seen in social work and IT programs.

Undergraduate Field of Study	Movement 2014 to 2018
Business Administration	▼
Psychology	▼
Computer Science	▲
Child Psychology	▲

Graduate Field of Study	Movement 2014 to 2018
Business Administration	▼
Nursing	▼
Elementary Education	▼
Curriculum & Instruction	▼
Computer Science	▲
Social Work	▲
Information Technology	▲
Nurse Practitioner	▲



IMPORTANT FACTORS IN SCHOOL DECISION

The cost of tuition and fees is still a top-ranking factor for deciding where online college students look to enroll. The cost of tuition and fees has been ranked as the top choice by students for the past four years, and it continues to dominate all other factors. The next most important factors are reputation of the school or program.

What are the most important factors in your decision about which school to enroll for an online program? <i>[Selected top three]</i>	All Students
Tuition and fees	34%
Reputation of the program I wanted	13%
Reputation of the school	11%
Home location of the school	11%
Quality of faculty	6%
The school offers multiple study formats	6%
Fit: the school reflects my values	6%
Positive interactions with staff during enrollment process	5%
Recommendation of someone I respect	5%
Alumni achievements	3%
Something else	1%

RECOMMENDATION:

Online college students are a unique, diverse group, and there is no single “right” way to approach this group. However, these students are career and goal focused, and they are searching for a program that can help them achieve these results. Most of them have learned online before and know what they want to study. Furthermore, the majority of online college students are looking to enroll full time. Higher learning institutions need to detail as much information on the programs and services that are offered to students as possible. If this is made available to students, an informed decision can be made more quickly.

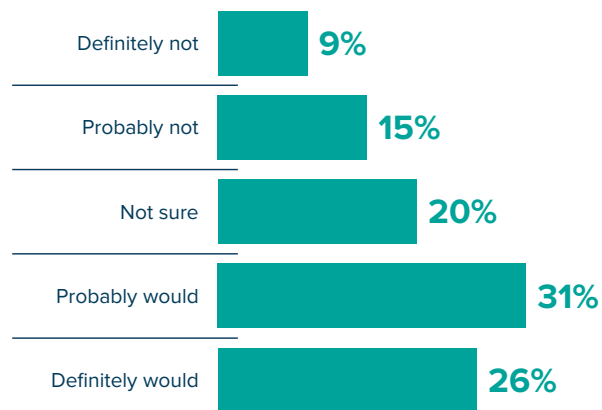
SECTION 2:

RECRUITING THE ONLINE COLLEGE STUDENT

STUDYING IN A CLASSROOM

Online students are able and willing to study in classroom environments; many are simply making a choice to study online. The majority (57%) probably or definitely would have enrolled in a classroom program if it was not offered online; these students are choosing to bypass the classroom. On the other hand, 24% likely would not have been able to go back to school without an online program, as they probably or definitely would not have chosen a classroom program if it was not offered online.

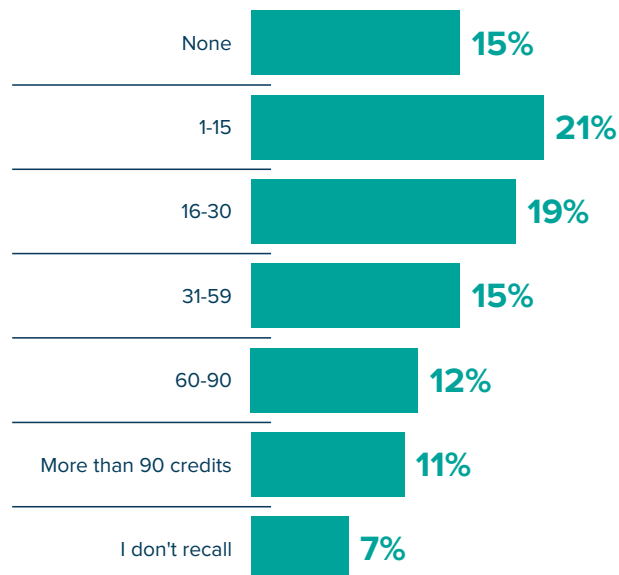
If the program you wanted was not available in an online format, how likely is it that you would enroll in a classroom program?



TRANSFER CREDITS

Transfer credit policies are very important to online college students. The majority (85%) of undergraduates have credit they can transfer into their next program. Nearly one-quarter (23%) of these students have earned 60 or more credits, putting them well on pace for completing a bachelor's degree. Only 15% have no credits to transfer into their next program, but they may have some type of life experience or training that could translate into experiential credits.

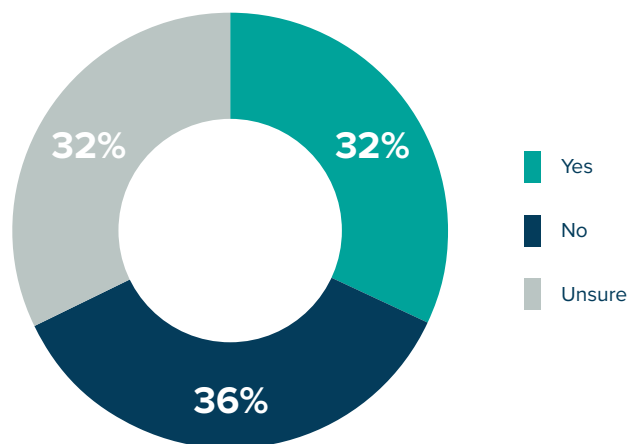
How many undergraduate credits do you have?



PRIOR LEARNING ASSESSMENTS

Prior learning assessments (PLAs) can award students credit for life or work experiences. About one-third (32%) of online college students are awarded this type of credit during the application process, but the remaining 68% said they did not or were unsure if they received such an award; this is a sizable group of students that could benefit in terms of time and money.

Did any of the online schools you applied to award you any credits from a prior learning assessment (PLA) or other method of awarding credit for life/work experience?



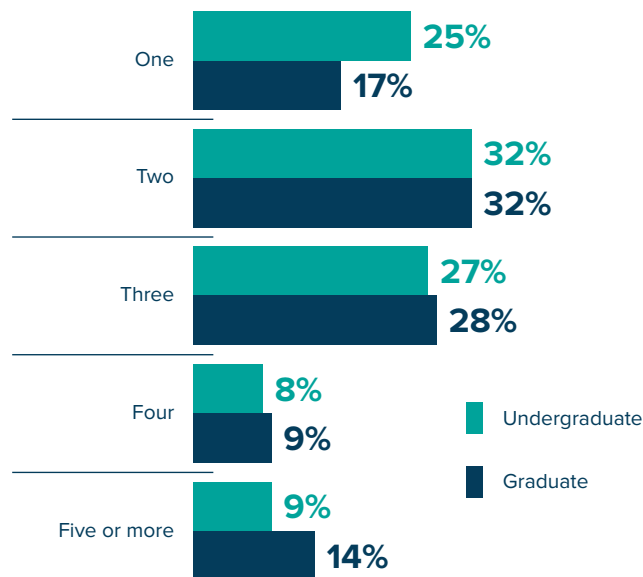
RECOMMENDATION:

Online college students have transfer credits and life experiences that can translate into academic credit. Schools should ensure that general transfer credit guidelines — such as how the process works, how many credits they are able to accept, and any articulation agreements that are in place — are clear on their websites. Furthermore, enrollment professionals should be asking students about transfer credits and life experiences, which will encourage a PLA process that helps students turn specific experiences into academic credit.

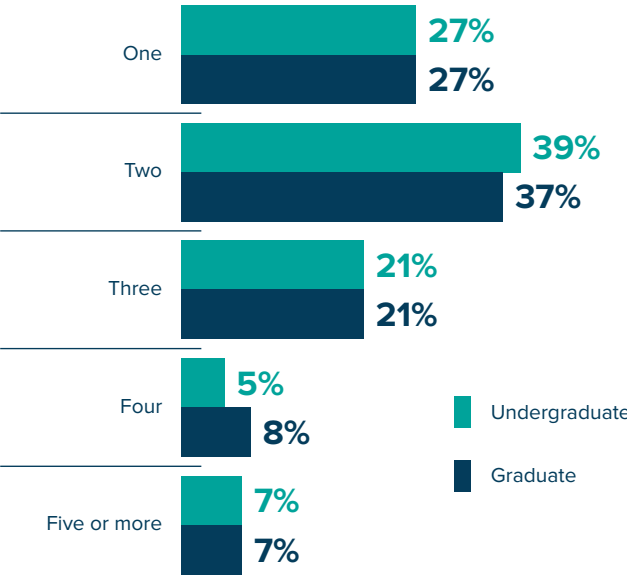
NUMBER OF SCHOOLS CONTACTED AND APPLIED TO

Fifty-nine percent of all online students reach out to two or three schools for information about an online program before deciding where to apply. Across the entire online college student population, the average student reaches out to 2.54 schools. Graduate students reach out to more schools for online program information than their undergraduate counterparts — an average of 2.70 schools compared to 2.44. But when it comes to how many schools students apply to, the numbers are nearly identical: 2.31 for graduates and 2.26 for undergraduates.

How many schools did you contact or request information from about online programs?



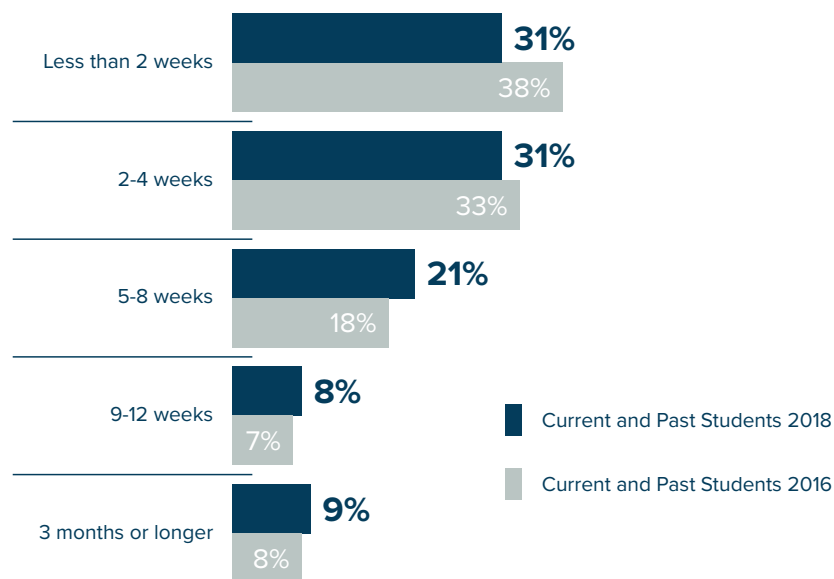
How many schools did you apply to?



APPLICATION TIMELINE

Online college students apply to a school within weeks of starting their search process. Sixty-two percent make the decision within four weeks. This may seem relatively fast for such an important and expensive life decision, but this statistic is lower than in 2016, when 71% of online college students began their search and applied to a school within four weeks.

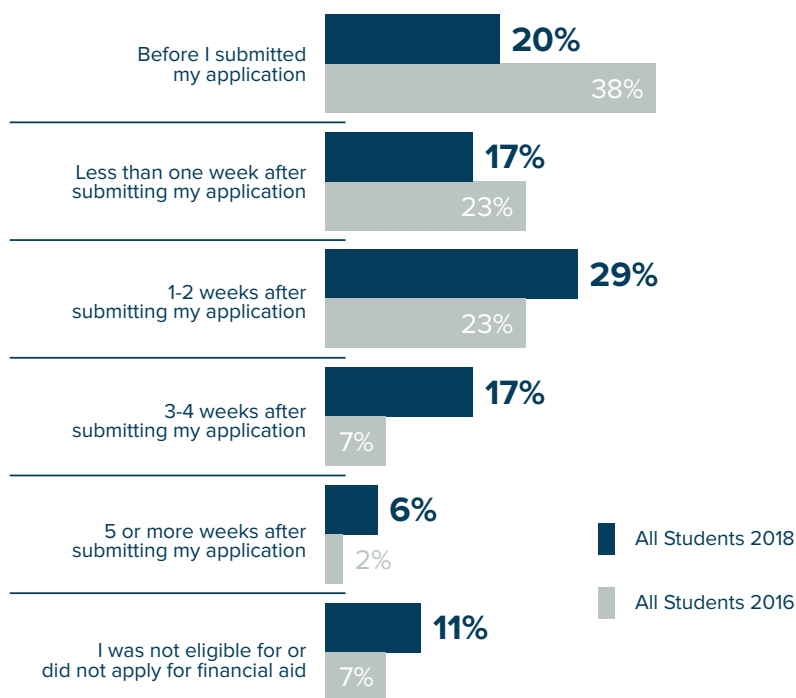
How long did it take you from the time you first started your search for an online program to completing your first application?



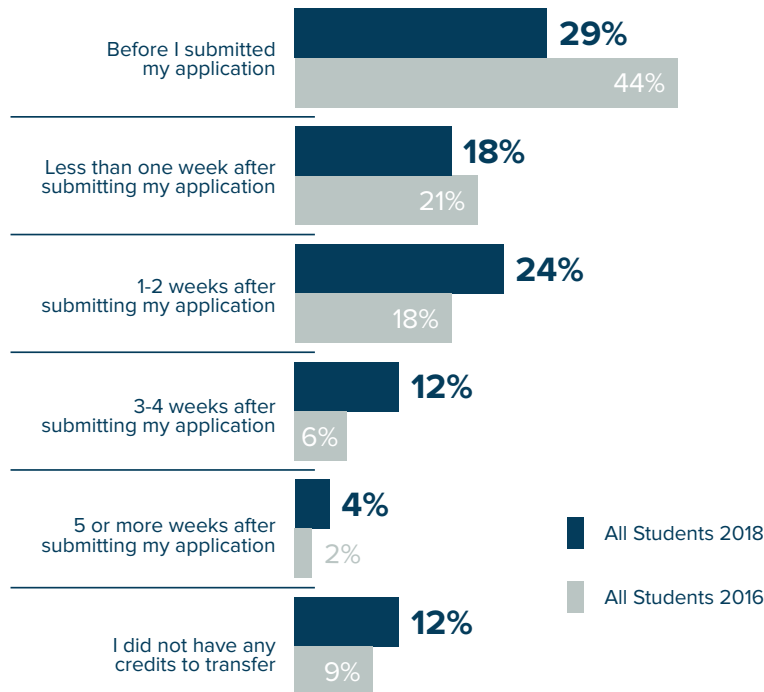
FINANCIAL AID AND TRANSFER CREDIT DECISION TIMELINES

Just as the time span from search to application has decreased, so has the strong demand for decisions on financial aid and transfer credit. In 2016, 38% of students wanted to know an estimate of their financial aid award before submitting their application, but this preference has declined to 20% of students. The importance of decisions on transfer credits has also decreased. In 2016, 44% of students expected to learn how much transfer credit they would earn before applying, but this figure declined to 29% in 2018. Although there is a sizable group of students looking for financial aid estimates and transfer credit decisions as soon as possible, nearly half of all online college students would be satisfied if this information could be provided within one to two weeks of applying.

When would you expect to receive (at least) an estimate of your financial aid award?



When would you expect to find out how much of your previously earned credit would transfer into your online program?



RECOMMENDATION:

Online college students typically know the program they are interested in and are motivated by career reasons. As a result, they want to move quickly through the application and enrollment process. Higher education institutions need to pay close attention to preliminary transfer credit evaluations and unofficial financial aid assessments, which can be key in helping students know where they stand with the institution and help them make a more informed decision on their education.

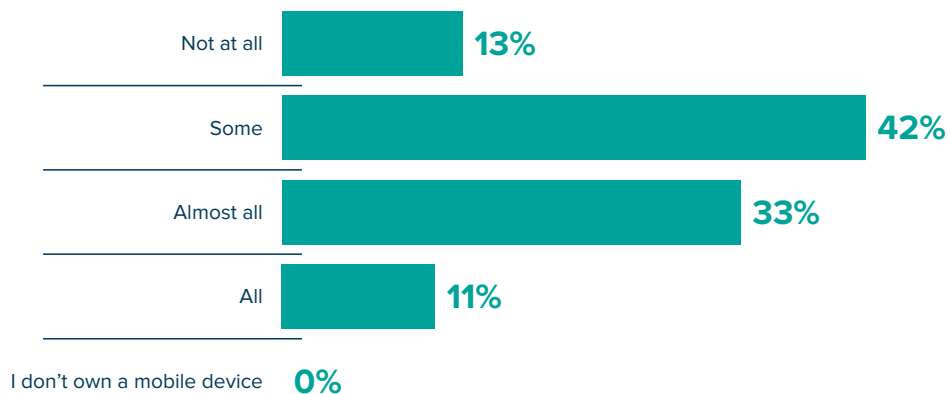
MOBILE SEARCH

More than 99% of online college students own a mobile device, which is defined as a smartphone or a tablet, but not a laptop. Forty-four percent of online college students conducted all or almost all of their research on a mobile device, while only 13% did not conduct any of their research this way. Therefore, everything from school websites to advertising needs to be mobile friendly.

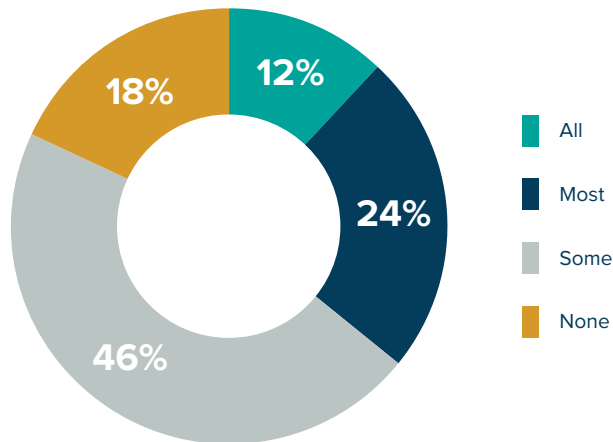
Thirty-six percent of prospective online college students would like to complete all or most of their online course-related activities on a mobile device. This mirrors the percentage of current or past online students when asked about how much of their coursework they have completed on a mobile device.

Online students were generally satisfied with the way content was displayed on their mobile device while they were conducting their search. Of those who used a mobile device, 68% rated the experience as a 4 or 5 out of a five-point scale where 5 was “very satisfied.” Only 8% rated the experience as a 1 or 2.

To what extent did you conduct any of your research about schools to attend on a mobile device? (smartphone or tablet, but not a laptop)



How much of your course-related activities would you like to complete on a mobile device?

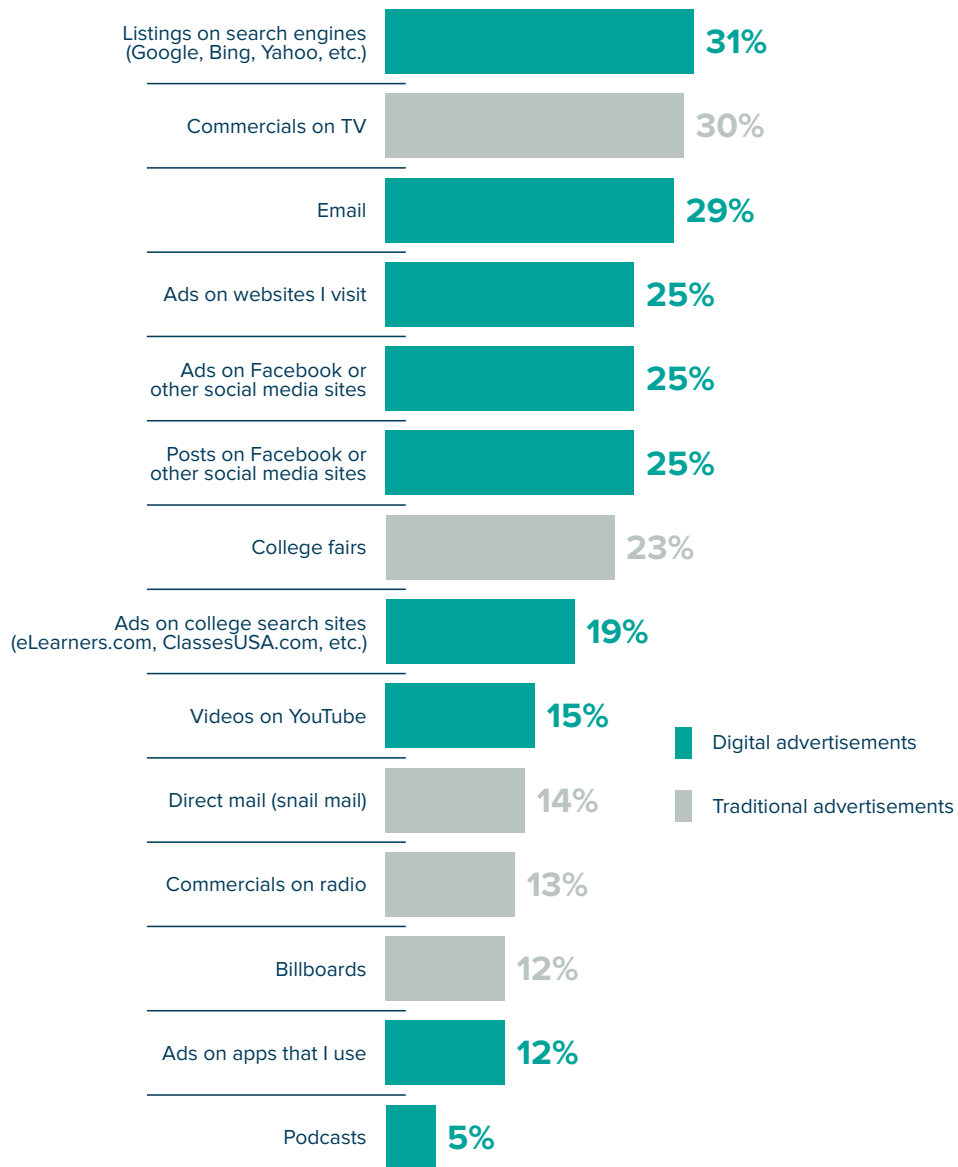


MEMORABLE ADVERTISEMENTS

Digital advertisements appear to be remembered more by online college students than traditional advertisements. It is unclear whether digital ads are experienced more often, but the impact appears to last longer. Information and ads on search engines, email, websites, and Facebook were seen and remembered by at least one-quarter of online students. It should be noted that TV ads (30%) and college fairs (23%) were also remembered by a significant number of students, presenting potentially strong advertisement opportunities in traditional media.

In digital media, YouTube ads and ads on apps and podcasts were less likely to be remembered. Traditional marketing channels including U.S. Postal Service direct mail, radio, and billboard advertisements were less likely to be remembered.

In which of the following do you remember seeing advertisements or information on online programs at the time you started your search for an online program? *[Selected all that applied]*



PRIMARY SOURCES OF INFORMATION

The school website is the No. 1 source (41%) for information on a student's program. This is followed by internet search engines (34%), but these searches typically lead them back to the school website, which reinforces the importance of the website. Once students have identified a program of interest, they call the school directly (23%) for more information. Sources that are less often utilized include social media curated by the school (15%), along with certain aspects of the school website, such as virtual open houses (13%) and live chat (9%).

After identifying schools of interest, what were your primary sources of detailed information about your program? [Selected top three]	All Students
The websites of the schools of interest	41%
Internet search engines (Google, Bing, etc.)	34%
Phone calls to the schools	23%
Conversations with friends, family	21%
Printed school guides and other materials	18%
Attending an open house/other event	16%
Social media sites (Facebook, LinkedIn, Google+, etc.)	15%
Conversations with my employer or colleagues	14%
Attending a virtual open house	13%
College search sites like eLearners.com, ClassesUSA, eLearnPortal.com	13%
Conversations with alumni	10%
Live chat on the school website	9%
Other	1%

RECOMMENDATION:

Online college students are naturally taking advantage of the internet to research and seek information about where they would like to attend online. Mobile devices are clearly being used to gather this information, which means that program information and marketing materials need to be optimized for mobile users. Interestingly, prospective online students also remember seeing nondigital ads, such as TV commercials, and attended college fairs at sizable rates; therefore, a multichannel approach would be best to attract these students to online programs. Prospects also use digital and nondigital means to solicit information on their program of choice as well. As a result, information should also be made available in multiple formats.

ONLINE PROGRAM FEATURES

Online programs can have several features to help attract and retain students. In the survey, we asked about three large categories of features: reduced total cost (▣), time to completion (■), and program quality and reputation (❖). Although we know tuition and fees are very important to online college students, when asking about online program features surrounding time to completion, these choices also have a significant level of importance to online students. Within this category, features such as year-round courses (27%), self-paced courses (25%), and being able to complete their program faster than a classroom program (25%) are seen as very important features for one-quarter or more of online college students.

Which of the following specific features of some online programs are most important in your selection of a specific online program in which you want to enroll? <i>[Selected top three]</i>	All Students
▣ Available scholarships, grants and/or assistantships	31%
■ Courses offered year-round (across all 12 months)	27%
■ Courses that are self-paced/do not have set deadlines	25%
■ Ability to complete studies in less time than a classroom program	25%
■ Availability of fast-track accelerated courses	20%
■ Ability to enroll in classroom courses also (if desired)	18%
■ Frequent program start dates throughout the year	18%
❖ Graduates are well-respected by employers in my field	17%
❖ Some online classes have sessions with set time to facilitate contact between students and instructors	15%
▣ Generous policies regarding acceptance of previously earned credit	14%
❖ Many faculty are also practitioners in their field	11%
❖ Ability to work in teams with other students	9%
❖ Many faculty teach full time, hold a doctorate	8%
Something else	0%

THE “SINGLE MOST IMPORTANT REASON” FOR SELECTING A SCHOOL

Once online college students have considered different programs, nearly one-quarter primarily chose a school based on the fact that it has the program that best matched their needs and interests. This statistic shows how having the program in an online format is critical in increasing enrollment, especially when institutions consider the fact that 15% of online students only consider one school. An additional one-fifth (19%) chose the least expensive school, reinforcing the strong influence price has on the decision. Reputation and perceived value are the most important factor for 25% of students. Interestingly, we know from Online College Students 2016 that approximately 20% of online students talk to friends and family about their selection, but only 3% ultimately weigh a personal recommendation as their top reason for selecting an institution.

Which of the following was the single most important reason you selected your top choice school, relative to the others you considered?	All Students
The programs best matched my interests/needs	24%
It was least expensive	19%
I only considered one school	15%
It has the best reputation	13%
It was the best value (combination of cost, reputation, and convenience)	12%
It was the school I knew best	5%
It was the closest school to where I live or work	4%
Offered quickest path to a degree	4%
It was the school that was recommended to me by someone I respect	3%
Had the most favorable admissions requirements	2%
Other	0%

RECOMMENDATION:

Online college students may be willing to select a program that allows them to complete their studies sooner (and save them money) even though tuition and fees are still one of their top deciding factors when selecting an institution. As not every school can be the least expensive, time to completion can become a variable to help a school tackle total cost if cost per credit is less of an option. Year-round courses, accelerated courses, and multiple entry points can make a difference when a student is choosing between a program that does not offer these same features and are low hurdles for most colleges and universities to navigate.

SECTION 3:

FINANCING EDUCATION FOR THE ONLINE STUDENT

TUITION REIMBURSEMENT

Forty-seven percent of undergraduate students and 64% of graduate students are employed full time, making tuition reimbursement an important employee benefit for institutions to recognize. However, half of these groups say that they did not use this benefit for their education. About one-fifth of these groups noted that they did not have access to tuition reimbursement. But when that group is factored out, it leaves 71% of undergraduate students and 61% percent of graduate students who did not use this existing for their online education programs.

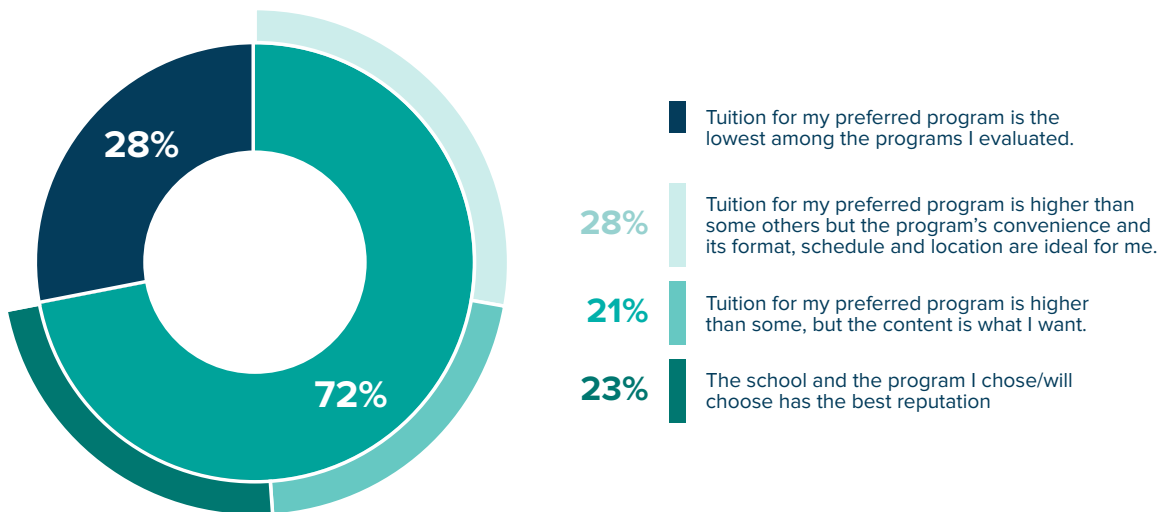
Did you use employer tuition reimbursement? <i>[Employed full or part time]</i>	Undergraduate	Graduate
Yes	23%	32%
No	54%	49%
Benefit not offered	23%	19%

PRICE VERSUS OTHER FACTORS

Online college students place a strong emphasis on tuition and fees. One interesting fact is that if they could redo the selection process, understanding tuition and fees of the institution they chose is an item they would “do over.” To help gauge the importance of tuition and fees, we asked a question that compared this factor to convenience, fit, and reputation.

Online students were almost evenly split when weighing tuition against these other factors. However, 72% of online college students would ultimately choose a program that costs more if they felt they were benefiting in terms of convenience, fit, or reputation.

Which of the following statements about tuition is the closest to how your made your enrollment decision?



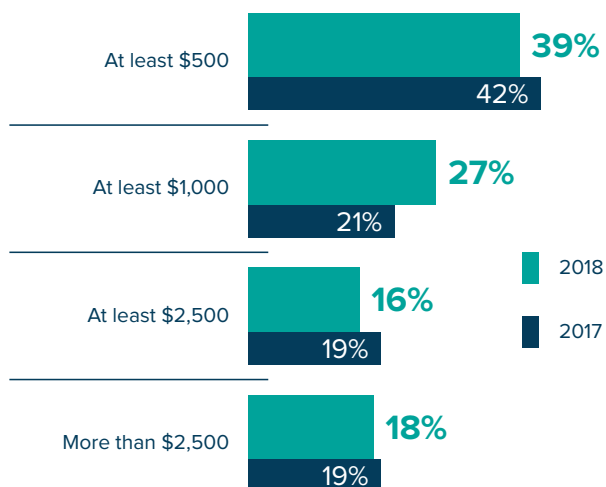
INFLUENCE OF SCHOLARSHIPS

Scholarships are a strong draw for online students, receiving a slight edge over tuition discounts. Forty-eight percent of students would be most attracted to either one of these benefits, which both have a significant lead over free items like textbooks, courses, or technology equipment.

Data from the past few years of the Online College Students survey has consistently shown that awards do not need to be large dollar amounts. A \$500 annual scholarship could sway 39% of students. This relatively small amount could significantly impact online enrollments.

Which would be the most attractive way a school could influence you to select it over another school?	All Students
Scholarships	25%
Tuition discount	23%
Tuition payment plan	21%
Free course	16%
Free textbooks	8%
Free technology equipment (computer, iPad, tablet, etc.)	7%

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



RECOMMENDATION:

Online students are willing to pay more for fit, quality, and added convenience. Small scholarships can sway them from one prospective school to another, but schools should first look to improve the messaging of their program. The unique features of the programs need to be front and center, including what a student will gain from completing the program at that institution.

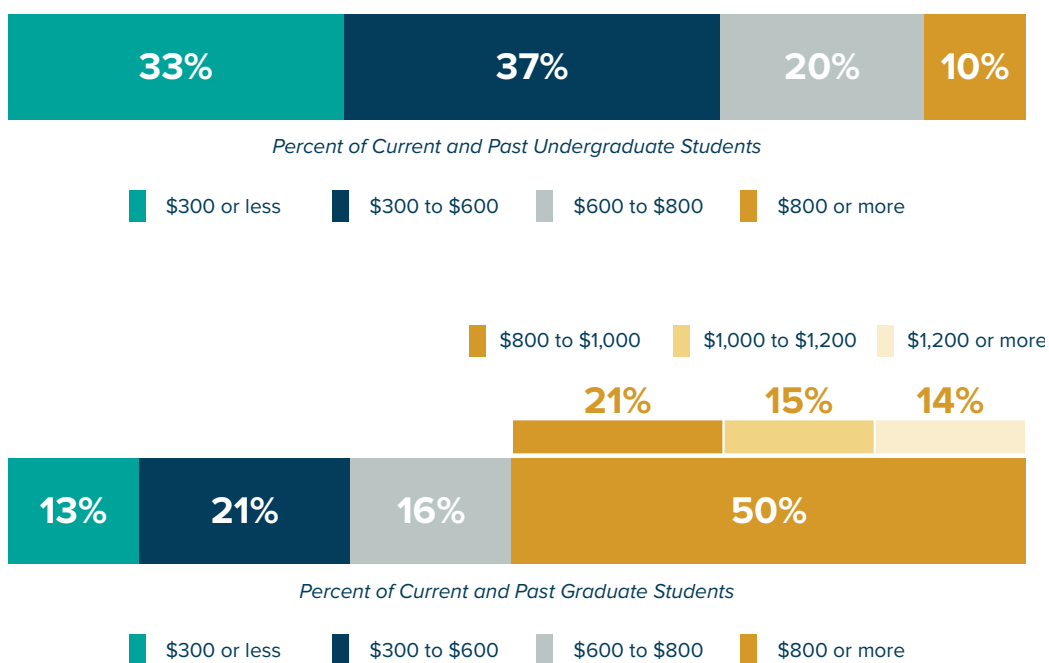
OPTIMAL TUITION

When asking current and past online students what they paid per credit — sans fees — for their online program, a wide variety of prices were given. However, there appears to be a common price range for undergraduate and graduate programs in the online marketplace.

At the undergraduate level, students rarely pay more than \$800 per credit (10%). The most common tuition rate is between \$300 and \$600 per credit.

At the graduate level, there is a wider range of prices given the specialized nature of these programs. Along with STEM majors, computers and IT are on the higher end of the pricing spectrum, where they are opposed by programs in education, health, and — perhaps surprisingly — business. Twenty-nine percent of online graduate students pay more than \$1,000 per credit, while 34% pay less than \$600 per credit. A program priced around \$800 to \$1,000 per credit appears to be the most common in the market.

**What is your per-credit tuition costs (not including fees)
for your most recent online program?**



RECOMMENDATION:

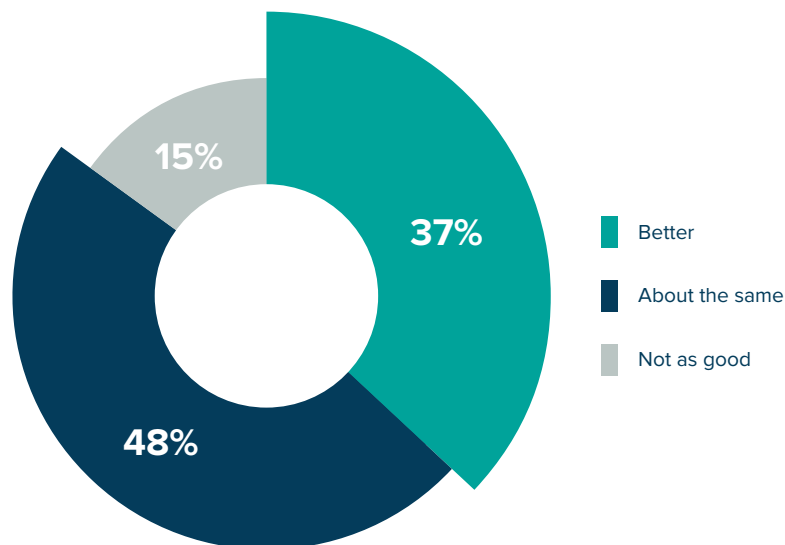
Tuition is the most important variable a school should consider when launching online programs. Schools need to make tuition and any additional fees they may be charged easy for students to locate on their site. If there are on-campus fees that online students do not have to pay, they should be noted as well to demonstrate the money saved by learning online.

PERCEIVED VALUE OF ONLINE LEARNING

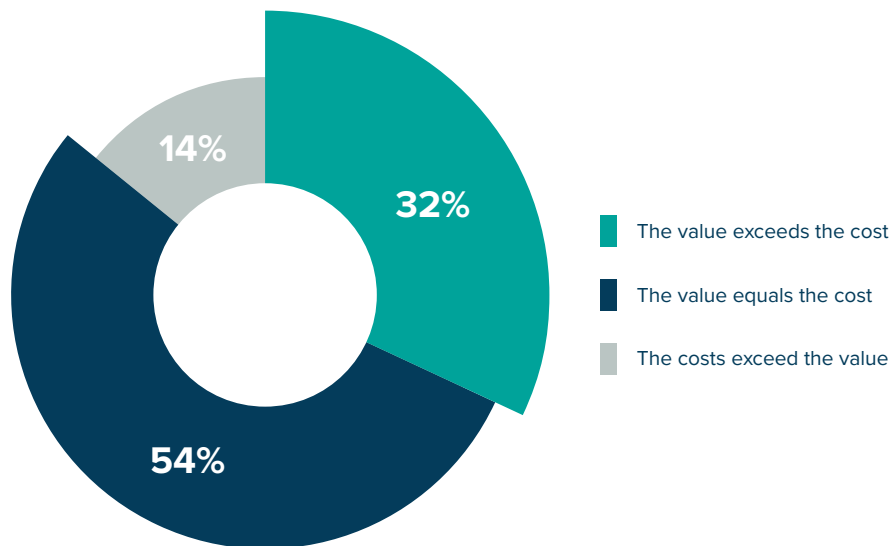
Does higher education deliver on its promise to online students? Do they benefit from the program in some form? In the survey, we asked three questions to gain insight into the value of online learning: Was the experience comparable to a classroom experience, was the cost of the degree comparable to the value it provides, and did you achieve the goal that motivated you to enroll? For all three of these questions, the results were overwhelmingly positive.

For online students who have previously enrolled in face-to-face and online courses, 85% felt that the experience in the online course was either the same or better than the classroom course. Between undergraduate and graduate learners, graduate students were more likely to feel their online experience was better than their previous face-to-face learning experience (42% versus 30%). Eighty-six percent of online college students feel the value they are receiving from their degree equals or exceeds the cost they paid for it. Two-thirds of online college students report achieving the original goal that motivated them to enroll in their program. Graduate students are more likely to say they achieved their goal compared to undergraduate students (76% versus 62%), with undergraduates more likely to say they did not yet achieve their goal (23% versus 12%).

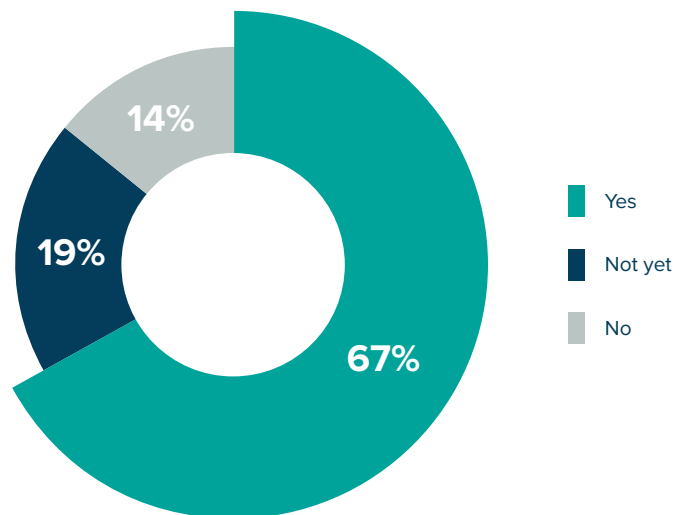
How would you compare the instruction of your college-level online learning experiences with your college-level classroom experiences?



How would you assess the balance between the cost of your online education with the lifetime value of that degree/certificate?



Did your online program help you achieve the goal that motivated you to enroll?



RECOMMENDATION:

Online college students are satisfied with their experience. Schools should gather this feedback, as well as personal stories from students, and create materials that promote how online programs have helped students achieve their goals. This can inspire prospective students and help them understand how an online program can impact their futures.

SECTION 4:

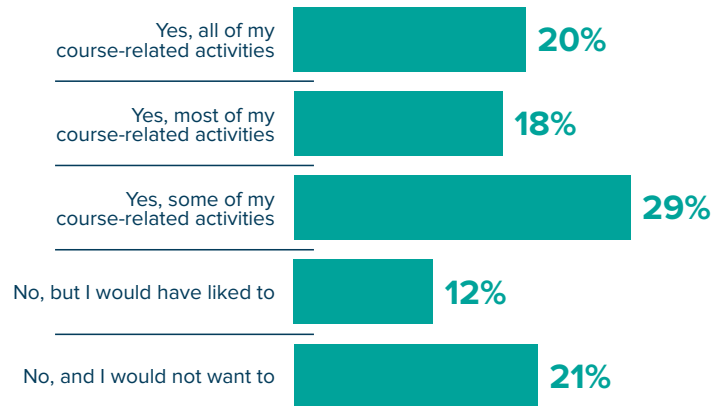
TEACHING THE ONLINE COLLEGE STUDENT

USING MOBILE DEVICES FOR ONLINE EDUCATION

Online college students are using — and want the option to use — mobile devices to access the online classroom and complete related activities. Seventy-nine percent completed at least some, if not all (20%), of their online coursework using a mobile device, or they wish they had the option to do so. Only one in five (21%) students said that they did not use a mobile device for coursework and would not have wanted the option to do so. This is a sizeable minority, but a group that is likely shrinking.

The most common activities for online students using mobile devices include accessing course readings (51%), communicating with professors (51%) and fellow students (44%), accessing the LMS (45%), conducting research for reports (41%), and completing assignments (40%). Fewer than one-third (31%) are accessing lectures; therefore, it appears that text-based activities are more likely to be completed on a mobile device than video or interactive activities. Sixty-seven percent of those who accessed course materials on a mobile device were satisfied or very satisfied with the way the content was presented on that platform. This figure is similar to the level of satisfaction for content when online students used a mobile device for conducting their online program search.

Did you complete any of your actual online course-related activities using your mobile device (phone/tablet)?



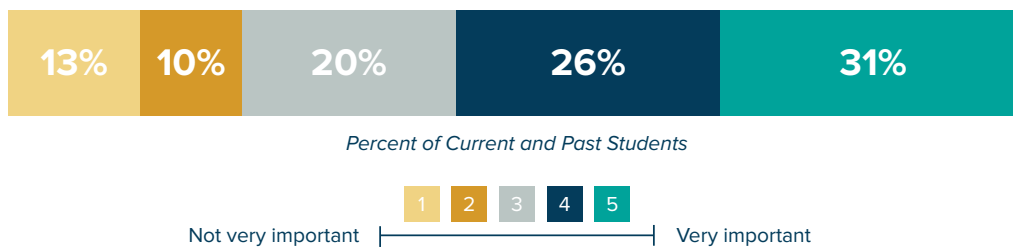
For what course-related activities do you use a mobile device? [Selected all that applied]	Current and Past Students
Reading required materials	51%
Communication with professors	51%
Accessing my college's LMS (such as Blackboard, Canvas, Moodle)	45%
Communication with other students	44%
Research for reports	41%
Completing assignments	40%
Required lectures	31%
Something else	1%
I didn't use mobile	3%

INGREDIENTS FOR SUCCESS

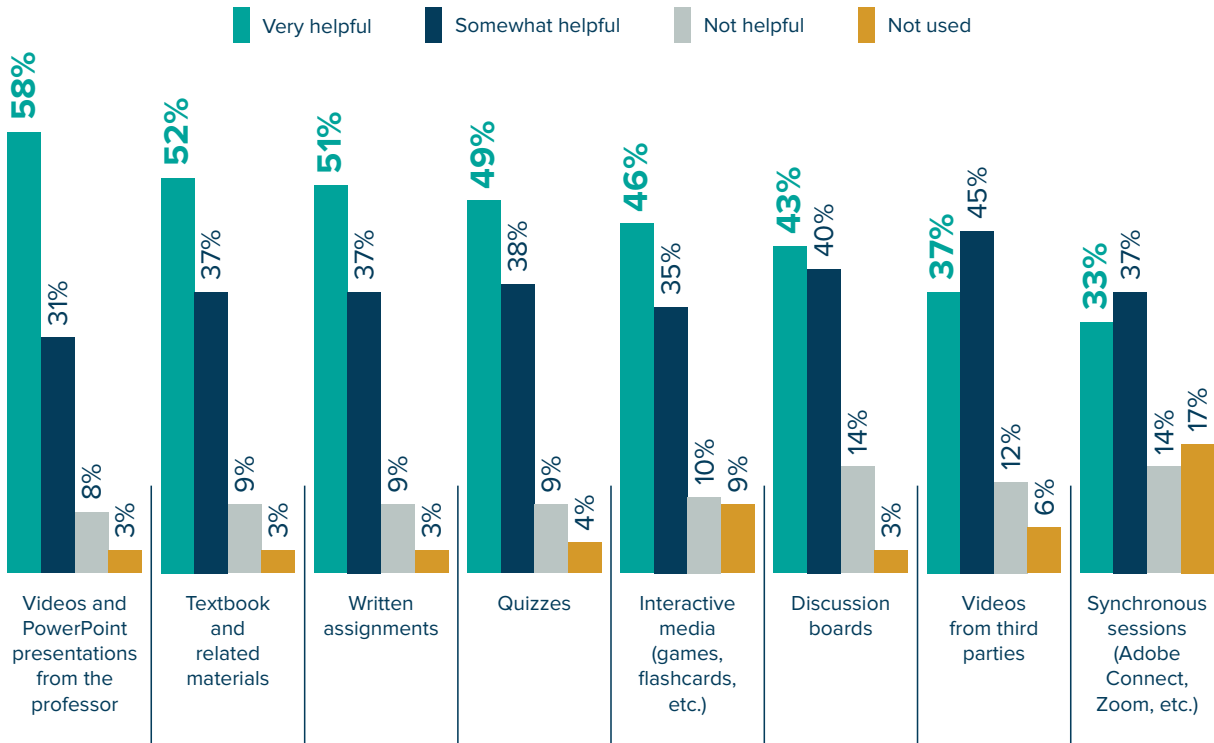
Interacting with classmates is important to students' success. Fifty-seven percent of current and past online college students feel these interactions are very important or important. Only 13% feel that these interactions are not important.

Some of the most helpful activities for the online classroom happen to be asynchronous items that students are able to consume and complete on their own time. Videos and PowerPoint presentations from the professor (58%), textbooks (52%), and written assignments (51%) are all seen as very helpful to the learning and success of current and past online students. Synchronous sessions are very helpful to only one-third (33%) of learners, and third-party videos (37% very helpful) also seem to make less of an impression on these students.

How important is it to your success as a student that you regularly engage with classmates in your online classes?



Please rate the following class activities and items in terms of how helpful they were to your learning and success.



RECOMMENDATION:

Along with the school website, the online classroom is another area that needs to be optimized for mobile devices. Since more than half of students point to a professor's presentations, textbooks, and written assignments as very helpful to their overall success, these items should be prioritized as a classroom is made mobile friendly. The classroom should also allow for regular interactions among students, as nearly 60% cite this as being very important.

SECTION 5:

INNOVATIONS FOR THE ONLINE COLLEGE STUDENT

COMPETENCY-BASED EDUCATION

Competency-based education (CBE) has been a hot topic of conversation within the higher education community for the past few years. As schools discuss entering the market by creating competency-based courses and programs to boost completion, we have asked a series of questions in our survey to gauge student knowledge and interest in CBE. We have changed the questions over the years; therefore, the trend is only directional, though it shows student knowledge and familiarity with CBE has grown over the past five years.

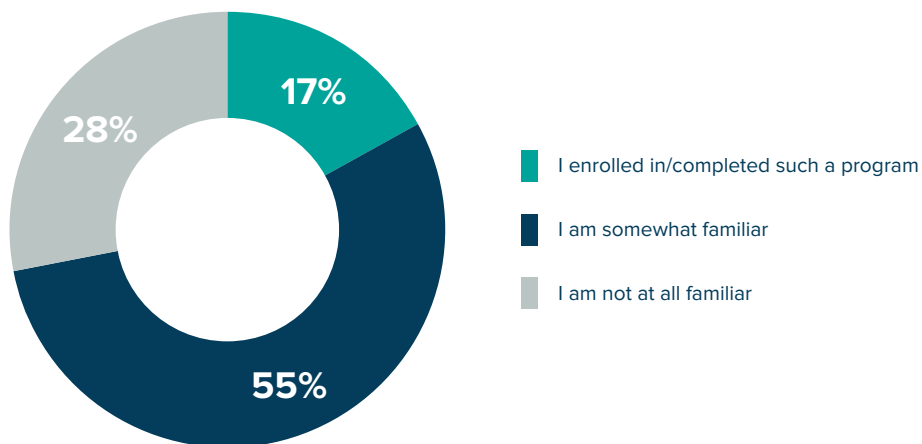
For the 2018 survey, we presented online students with the following information about CBE:

“Competency-based learning is being used in some online programs. It avoids the traditional ‘credit hour’ system as students work to acquire competencies (a measure of knowledge attained, rather than time spent) at a self-defined pace. Students can progress more quickly, or more slowly, throughout the process. Professors coach and guide students through the material in a more personalized setting rather than lecture.”

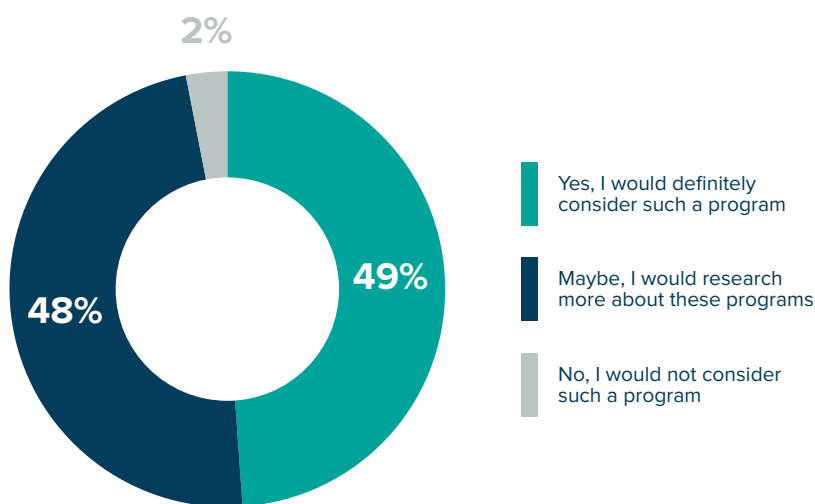
In 2018, 72% of online college students have some level of familiarity with CBE, with 17% reporting they have enrolled in or completed such a program. When asked where they completed the program, Western Governors University and the University of Wisconsin were cited as providers, as well as schools without known CBE programs, such as the University of Connecticut and Post University. Therefore, it appears that even with information provided to students, there is still confusion about CBE.

Students are on board with the general idea of CBE, but they may need to learn more about what is involved. Forty-nine percent of students would be interested in a CBE program in the future, and an additional 48% would like to learn more about CBE.

How familiar are you with “competency-based” learning?



Would you consider a “competency-based” program in the future?



RECOMMENDATION:

Though CBE continues to receive much attention within higher education, there is still confusion among students about what it is and why they should care and seek out such programs. Which students should seek out these programs? And what are the benefits? Higher education needs to consider these types of questions and educate prospective students about CBE.

STACKABLE CERTIFICATES

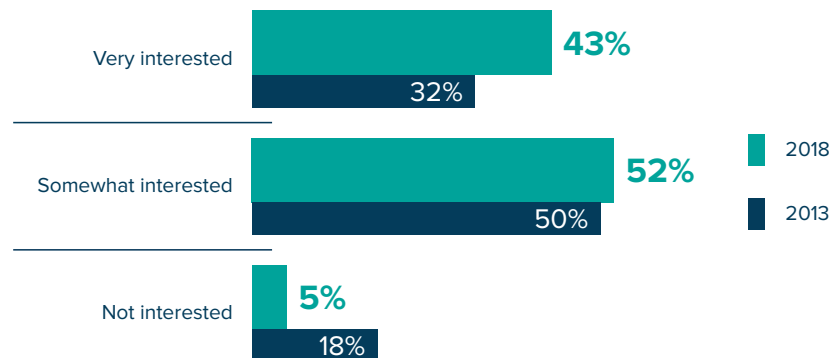
Stackable certificates are another innovative concept in higher education that likely needs more explanation to prospective students. Stackable certificates enable students to learn specific skills in an area and earn an academic credential that can boost their employment opportunities. Multiple certificates can be stacked and become a full degree. This is a powerful route for students; otherwise, they would have to pursue these skills and knowledge in a program that does not offer credit, or they would have to go outside of higher education, where academic quality and verifiable learning is less regulated and transparent.

In our survey, we have examined stackable certificates for multiple years and found a strong surge in interest since 2013. During this period, students not interested in stackable certificates have reduced dramatically, from 18% in 2013 to 6% in 2018.

We presented online students with the following information about stackable certificates:

“Some institutions have begun offering so-called stackable certificates, a type of credential that can be earned individually, with several combining over time to earn a degree.”

How interested might you be in this option for undergraduate or graduate study, if it were available in your subject area of interest?



TEXTBOOK-FREE COURSES

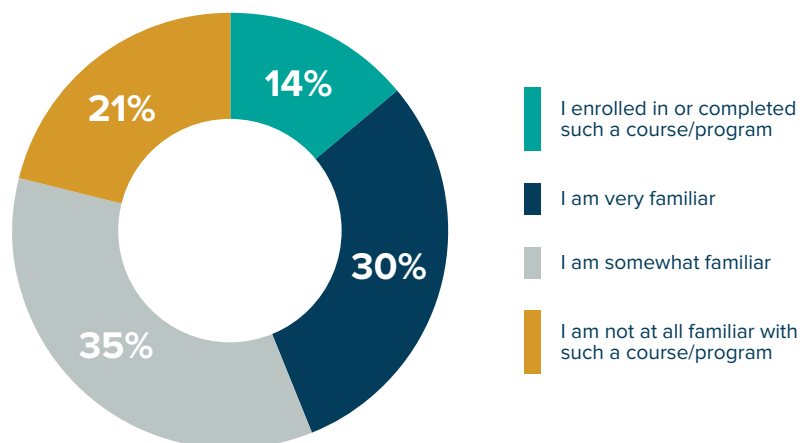
From multiple years of conducting the Online College Students survey, we understand how price sensitive online students are when deciding between programs. However, the cost of tuition is increasing, which means that institutions need additional avenues to make education more affordable. OERs have emerged as a way to accomplish this goal. They can save students hundreds of dollars per course by using online resources to eliminate the need for textbooks.

For our survey, we presented online college students with the following information about textbook-free courses:

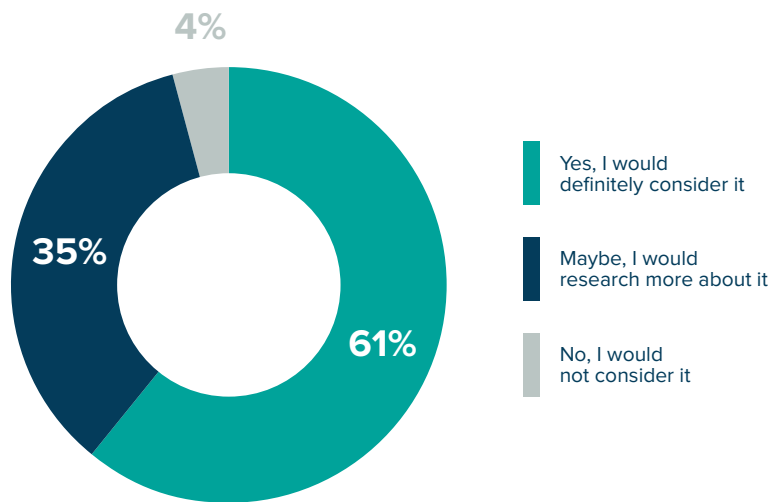
“Textbook-free courses and programs remove the cost of textbooks to the students by leveraging a variety of alternative materials including open educational resources, e-content through the library [journals, databases, LibGuides, etc.], internally created materials [video lectures, ebooks] and other sources openly available on the web.”

Online students appear familiar with the textbook-free idea; only one in five (21%) are not at all familiar with the concept. Sixty-one percent of online college students would definitely consider a textbook-free course or program in the future. Although we know that students value their textbooks — 52% point to them as being “very helpful” in their academic success — the idea of a textbook-free course does not seem to scare them away. They realize that they will be provided alternative study materials to help them through their course.

How familiar are you with textbook-free courses or programs?



Would you consider a textbook-free program in the future instead of one that is not “textbook-free”?



RECOMMENDATION:

Textbook-free courses are another way schools can address the cost variables that concern online students more than any other factor. If a program can become textbook-free using OERs and other sources, this can be a strong selling point for prospective students to save money.

SECTION 6:

SERVICING THE ONLINE COLLEGE STUDENT

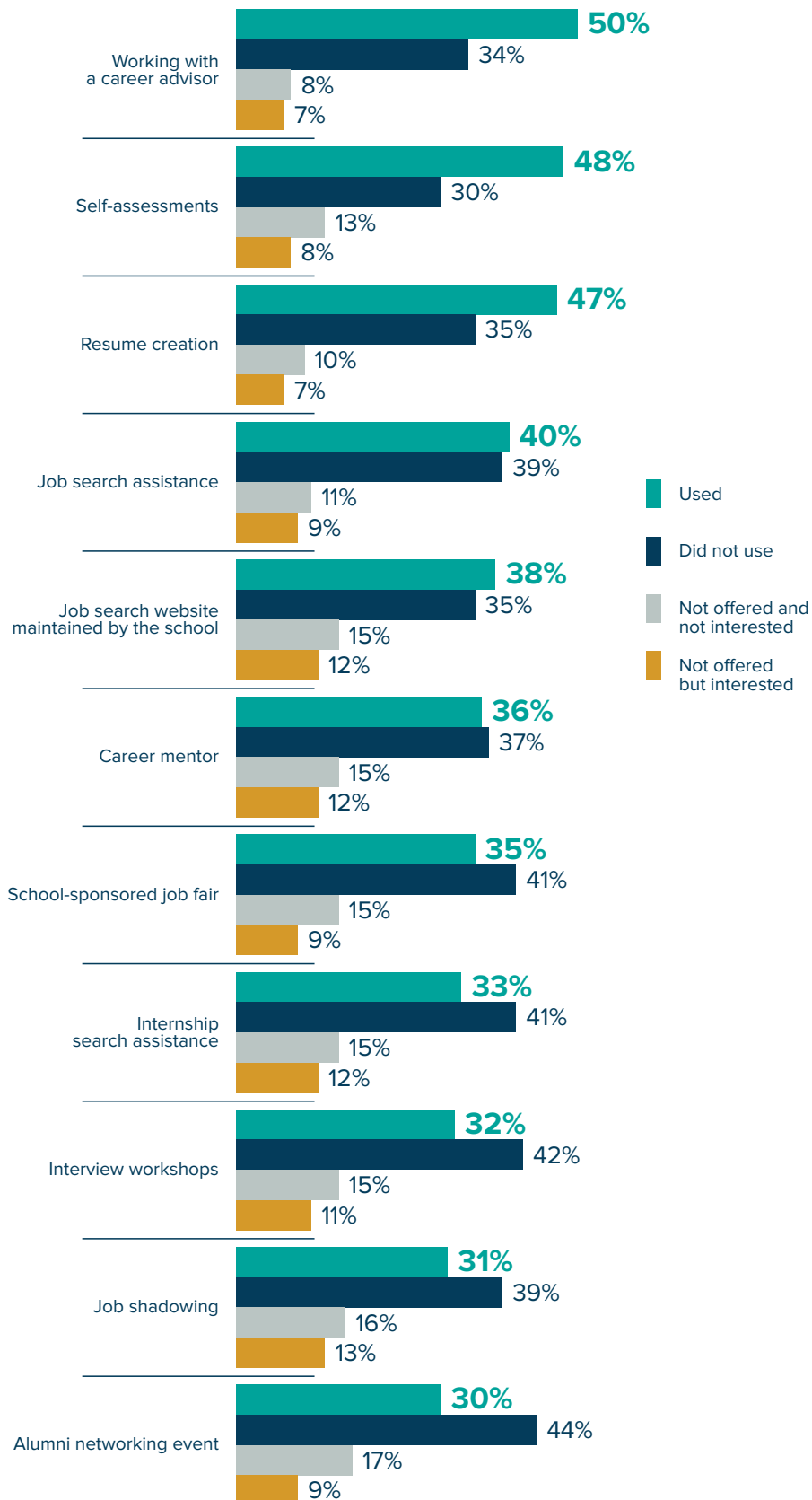
CAREER SERVICES

In 2017, the Online College Students survey first started asking about students' use of and interest in career services. At that time, 75% said that their school offered career services, and of that group of students, 77% accessed the career services offered to them. Of the 12% who said that their school did not offer career services, two-thirds (66%) said that they wished their school would have offered them. We followed up in 2018 to determine specific career services accessed and in what format.

Of the 11 career services listed, all were commonly offered by schools with online programs. Frequently accessed services include working with a career advisor, self-assessments, and resume creation. All three of these services are used by nearly half of current and past online college students, and these services are offered by more than half of schools. Job search assistance and a job search website are also commonly available online, but student use is almost equally split between using and not using them.

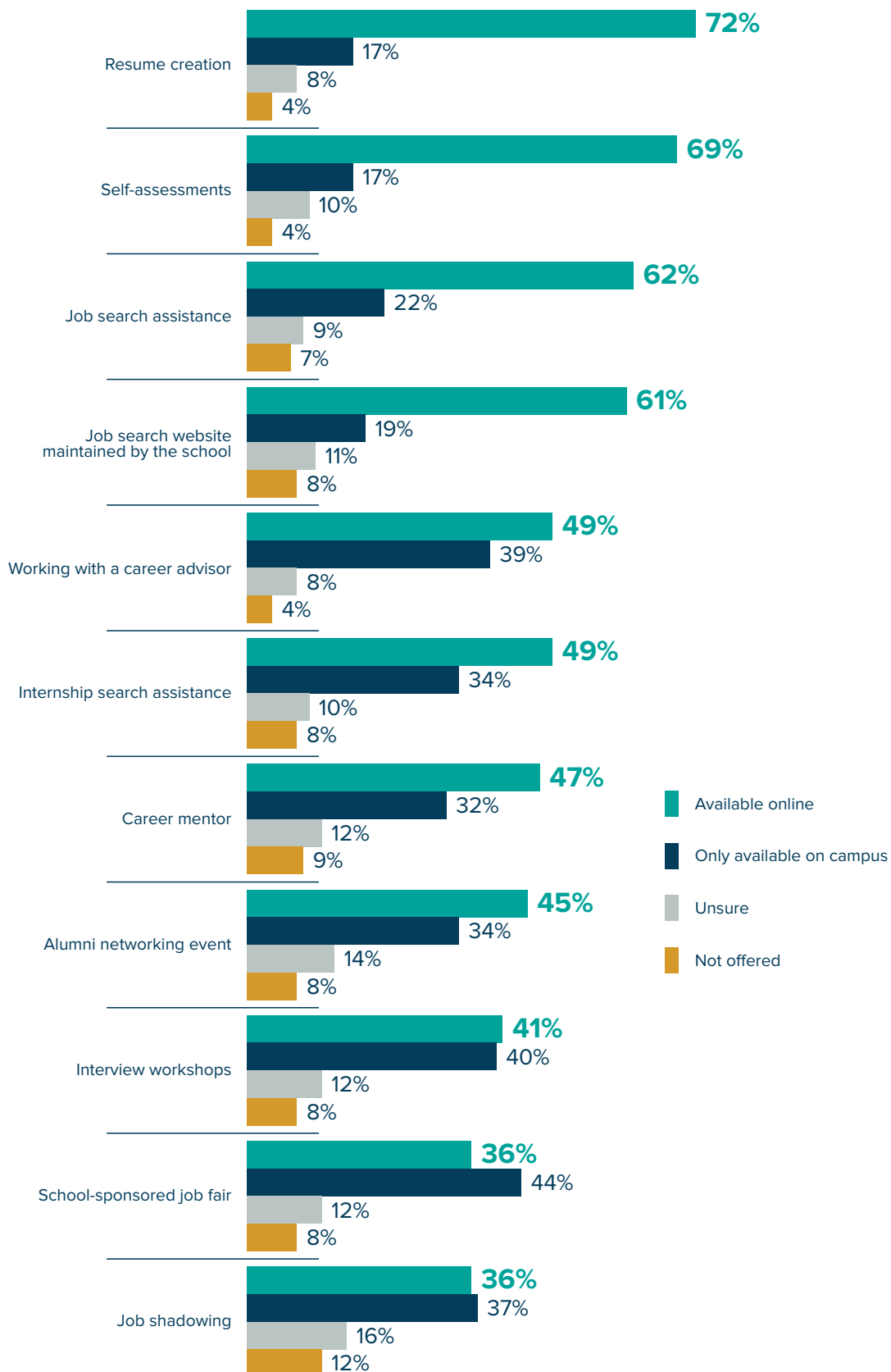
Mentors, job fairs, internship assistance, interview workshops, job shadowing, and alumni events all have a greater percentage of students who do not use these services compared to those who use them. If they are not available, students are nearly equal split in terms of desiring these services. Since they are less likely to be offered online by schools, access could be clouding the use and perceived value of these services.

Which of the following career services did you use?



SECTION 6: SERVICING THE ONLINE COLLEGE STUDENT

How were each of these services made available?



SECTION 6: SERVICING THE ONLINE COLLEGE STUDENT

STAYING LOCAL

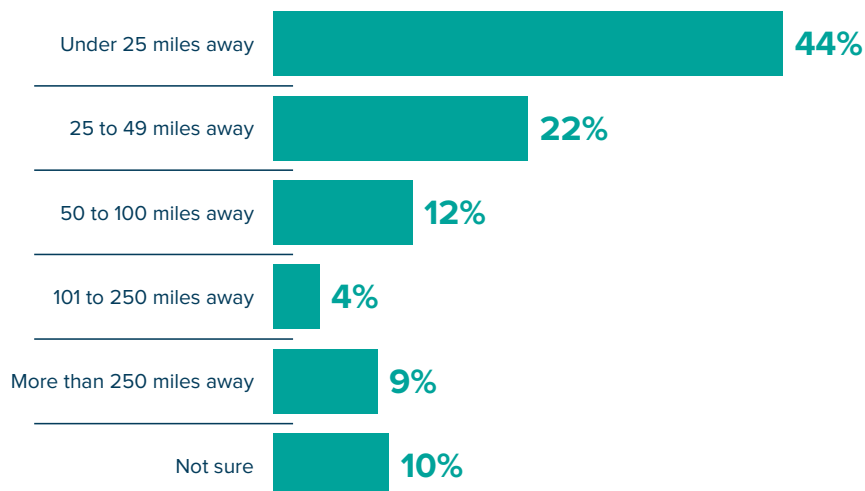
Although online learning allows a student to study anywhere there is an internet connection, the overwhelming majority of online college students are local to their school. This finding has been consistent since we first published the Online College Students report in 2012.

Over three-quarters of students enroll at an institution within 100 miles of their home. Part of the reasoning may be that students and their employers are familiar with and value these schools. However, some online students want to visit the physical campus, with a portion of those doing so regularly. Seventy-six percent visit their campus at least once a year, and 45% do so three or more times per year.

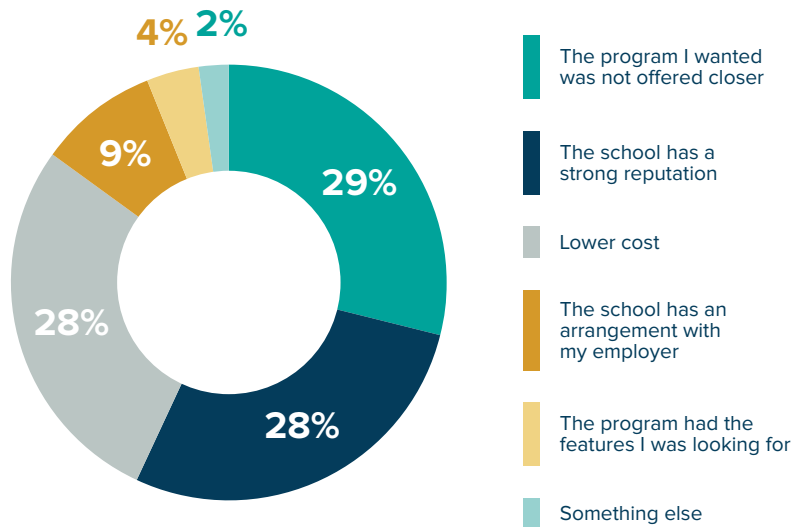
Why are online students visiting campus? Common reasons include meeting with their instructor (40%), making a payment (31%), meeting a study group (29%), and using the library or lab (29%).

On the other hand, a small portion of students (13%) choose schools more than 100 miles away from them. There are three main reasons for this: The program was not offered closer to them (29%), the school had a strong reputation (28%), or the program was at a lower cost (28%). Graduate students are more likely than undergraduates to seek out a school with a better reputation, even if it is farther than 100 miles away (32% versus 24%).

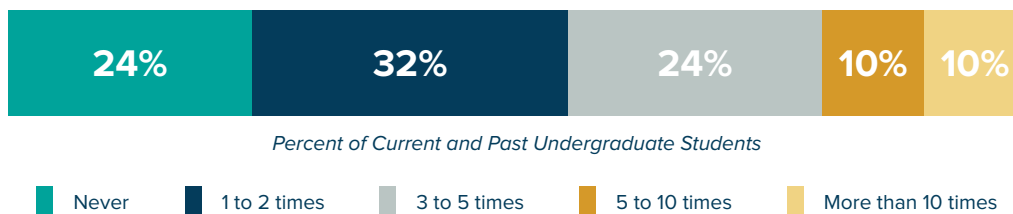
How far do you live from the closest campus/service center of the college/university in which you enrolled?



Why did you choose a school more than 100 miles away from you?



In the course of a year that you were enrolled in fully online study, how often did you visit the school's campus/service center?



RECOMMENDATION:

Online college students are local and tend to visit campus. Career services can be another reason for a student to want to connect with the campus; however, certain services likely can, and should, be developed for online delivery. Working with a career advisor or job search assistance could be done via Skype or a similar platform. Resume help could take place via email for online learners. Additionally, on-campus faculty office hours as well as the hours for the library and other service centers should be made apparent to online students, as they may wish to build a personal connection with the institution.

DOING IT OVER AGAIN

If online college students could change any part of their search or enrollment process, nearly half would not change anything. This is a positive finding, but it shows room for improvement — more than half of students have something they wished they did differently. One-quarter (24%) feel they should have contacted or researched more schools. Keep in mind that the average number of schools contacted is two to three, and 27% apply to just one school. Part of this trend may be that online students have a degree of confidence because some of them they know what they want to study and have experience with online learning. However, this confidence may betray them given how many wished they researched more schools, learned more about their financial aid (15%), learned more about tuition and fees (14%), or spoken more to their enrollment counselor (14%). All of these tasks could have been completed before enrollment took place.

If you had the opportunity to change any part of your search or enrollment process, what would you do differently? [Selected all that applied]	Current and Past Students
I would not change anything	44%
Contact/research more schools	24%
Learn more about my financial aid package	15%
Learn more about the tuition/fees	14%
Talk more with an enrollment counselor	14%
Learn more about the school's transfer credit policies	11%
Talk to a friend/family member about the decision	10%
Learn more about the program requirements	8%
Choose a different subject area	5%
Choose a different school	5%
Choose a program with more on-campus coursework	5%
Learn more about the school's values and reputation	4%
Better my understanding of my employer's attitudes about online education	4%
Check my program out with my employer	4%
Something else	0%

RECOMMENDATION:

Since online students tend to choose their schools quickly and without weighing many options, it is not surprising that they wish they had sought out more information before enrolling. Institutions should present relevant information to students clearly so they have what they need to make their decision. Otherwise, students may have feelings of buyer's remorse once they start their courses.

APPENDIX:

DEMOGRAPHICS

What is your gender?	Undergraduate	Graduate
Male	25%	32%
Female	74%	68%
Prefer not to say	0%	0%

What is your annual household income?	Undergraduate	Graduate
Under \$25,000	29%	23%
\$25,000-39,999	23%	18%
\$40,000-54,999	15%	15%
\$55,000-69,999	13%	14%
\$70,000-84,999	8%	9%
\$85,000-99,999	4%	6%
\$100,000-114,999	4%	8%
\$115,000-129,999	1%	2%
\$130,000-149,999	2%	2%
\$150,000 or more	2%	5%

What is your employment status?	Undergraduate	Graduate
Employed full time	47%	64%
Employed part time	25%	17%
Not employed	25%	18%
Retired	1%	0%
Prefer not to say	2%	1%

Level of Study	All Students	Undergraduate	Graduate
Associate degree	20%	33%	-
Bachelor's degree	27%	45%	-
Master's degree	22%	-	54%
Doctorate	4%	-	10%
Certificate program	23%	19%	30%
Licensure program	4%	3%	6%

What is your marital status?	Undergraduate	Graduate
Married/partnered	36%	45%
Single	63%	54%
Prefer not to say	2%	2%

How many children under age 18 do you have?	Undergraduate	Graduate
None	57%	49%
One	19%	23%
Two	15%	18%
Three or more	9%	9%
Prefer not to say	0%	1%

What is your race or ethnicity?	Undergraduate	Graduate
African-American	17%	20%
Asian or Pacific Islander	6%	8%
Hispanic	13%	10%
Native American	1%	1%
White	62%	59%
From another background	1%	1%
Prefer not to say	2%	1%

METHODOLOGY

In winter 2018, Learning House and Aslanian Market Research conducted surveys with 1,500 individuals nationwide. Respondents were at least 18 years of age; had a minimum of a high school diploma or equivalent; and were recently enrolled, currently enrolled, or planned to enroll in the next 12 months in a fully online undergraduate or graduate degree, certificate, or licensure program.

According to the U.S. Department of Education, graduate students represent 14.7% of the total college population but 27.5% of online population. The sample for this survey was weighted to include approximately 40% graduate students to ensure a large enough sample for meaningful conclusions. The data are presented for both undergraduate and graduate students combined unless there were noteworthy differences.

Aslanian Market Research's partner interview group identified the sample of 1,500 respondents. The sample was drawn from an actively managed, 100% market research-only panel that represents the U.S. Census Bureau, which enables the selection of groups that prove difficult to source. Up to 250 behavioral and demographic data points on each consumer panelist have been collected, which allows Aslanian Market Research to target respondents for specific research objectives.

To recruit for this study, a panel of consumers was invited from across the nation 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 years of age or older. Panelists were allowed to participate in the study if they had participated or were planning to enroll in a fully online degree, certificate, or licensing program.

Respondents hailed from all 50 states. The states that represent 51% of the nation's population (according to the 2012 U.S. Census) represented 51% of the study's respondents. These states include California, New York, Florida, Colorado, Illinois, Texas, Georgia, New Jersey, Pennsylvania, and Ohio.

The National Center for Education Statistics (2018) IPEDS data show that in 2016, 3.3 million higher education students were enrolled in courses that were exclusively delivered via distance education. Eduventures (2017) estimated the size of the wholly or majority online program market for the fall of 2014 to be 3.75 million students. Based upon these findings, a sample of 1,500 represents approximate sampling error of +/-3% at a 95% confidence level.

A similarly small margin of error was achieved in the 2012, 2013, 2014, 2015, 2016, and 2017 surveys; therefore, differences between these survey results over 6 percentage points may be significant. We only address differences between the surveys that are at least 10 percentage points to err on the side of caution. The margin of sampling error is greater for subgroups.

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TECHNICAL NOTES

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

PARTNERS

The Learning House, Inc. helps people improve their lives through education. As an academic program manager, Learning House offers technology-enabled education solutions designed to meet the needs of a dynamic global market. Solutions include Online Program Management (OPM), Enterprise Learning Solutions, The Software Guild, Learning House International, and Advancement Courses. With a focus on data-driven decision-making, Learning House is on the leading edge of higher education. Learning House provides expertise in research and analytics, marketing, enrollment, retention, and instructional design. Through its broad portfolio, Learning House delivers more students, more graduates, and better outcomes.

EducationDynamics is a proven leader in helping higher education institutions find, enroll, and retain students. The organization maintains its industry leadership through a deeply rooted philosophy of serving our schools best by serving students first. This commitment has been at the heart of its success since it began more than a decade ago, and it continues today as we proudly serve more than 1,200 colleges and universities of all types and sizes.

Aslanian Market Research (Education Dynamics' market research unit) conducts market demand studies, institutional audits, program and marketing reviews, and professional development seminars and workshops for colleges and universities seeking information and data on how to expand adult and online student enrollments. Throughout the last 25 years, our staff has worked with more than 300 colleges and universities of all types — public, private, large, small, rural, suburban, and urban — in every region of the U.S. Its seminars have provided thousands of college administrators with practical, hands-on tactics that they can implement at their institutions at minimal cost for maximum impact.

REFERENCES

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