



2019

ONLINE COLLEGE STUDENTS

Comprehensive Data on Demands and Preferences


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EDUCATION SERVICES

ONLINE COLLEGE STUDENTS 2019

Comprehensive Data on Demands and Preferences

A joint project of Learning House, a Wiley brand, Aslanian Market Research, and Wiley Education Services

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INTRODUCTION

PREFACE

In 2006, a rule that restricted colleges and universities from offering more than 50% of their courses online was eliminated from the Higher Education Act. For-profit and adult-focused public universities swiftly launched online programs that proved popular among adult learners who wanted a flexible program that fit their busy lives. These pioneering schools were soon followed by entrepreneurial nonprofit colleges and universities, often seeking to reverse stagnant or declining enrollments. Their strategy for introducing online programs was simple: “If you build it, they will come.” Students came to these programs in droves.

Once online programs proved profitable, a wave of schools entered the market. By 2016, only 10 years after the 50% rule was eliminated, 32% of college students took at least one online course, and 17% were enrolled in fully online programs (NCES, 2016). At that time, 72% of public and 50% of private, nonprofit schools offered fully online programs (Xu & Xu, 2019). With better-known brands, they captured market share from for-profit schools, forcing many to close or merge.

What’s next? Does the online market have room for schools that have stayed on the sidelines? How can schools develop new online programs that students find meaningful? What strategies and practices will help schools thrive? The purpose of the *Online College Students* report is to answer these questions, provide guidance to school leaders, and help them retain students through to graduation.

This is the eighth edition of the *Online College Students* report. Learning House, a Wiley brand, and Aslanian Market Research, a division of EducationDynamics, have produced this research since 2012 to document the preferences and behaviors of students enrolled in fully online programs.

To develop this report, Learning House and Aslanian Market Research surveyed 1,500 prospective, current, and recently graduated fully online college students. The survey that underpins this annual report has evolved over time. To document trends, certain questions are asked every year, while questions that receive consistent responses are replaced with new questions to identify significant shifts in preferences and behavior.

While this report notes comparisons with past data where significant, readers are encouraged to review the seven previous editions of *Online College Students* for more information. To access those reports, visit www.learninghouse.com/research and www.educationdynamics.com/e-books.

Recommendations for online programs based on survey findings and current best practices are presented in ***bold, italicized text within colored boxes*** at the end of selected sections.

KEY FINDINGS

Below is a summary of key findings within the report.

1. Online Students Believe They Acquire the Soft Skills That Employers Desire

Only one-third to one-half of respondents say their school taught soft skills that employers value, such as writing and critical thinking. Even so, more than 60% reported that their online education helped them improve these skills. Critical thinking and problem-solving (85%) were the most improved skills cited, while teamwork (69%) and oral communication (62%) were the least improved.

2. A Significant Proportion of Online Students Want a Lifelong Relationship With Their School

More than 40% of current online students and graduates plan to return to their alma mater to take additional classes. Beyond opportunities to become a lifelong learner as an alum, about one-third of students say they would recommend their school to prospective students, about one-fifth joined or plan to join their alumni association, and 13% plan to donate to their school after graduation.

3. Most Students Use Mobile Devices to Complete Coursework

Fifty-six percent of current and past online college students use a smartphone or tablet to complete at least some of their online course-related activities, while two-thirds of prospective online college students want to use a mobile device to complete coursework. Despite this demand, 17% of respondents indicated that their program did not support mobile access. Additionally, students 45 and older are significantly less likely to use or want to use a mobile device for coursework, highlighting a generational difference.

4. The Online Population Is Complex

The complex online student population includes learners from multiple generations and segments. About half of online college students are millennials (ages 28 to 38), about one-third are from Generation X (ages 39 to 54), and the remainder is split between baby boomers (ages 55 to 73) and Gen Zers (ages 18 to 22) (Fry & Parker, 2018). One-third of online college students are first-generation college students, and 13% have no prior college experience. Of online students with past college experience, about one-third are returning after a break of five or more years. A single class may include students from each of these age groups, which creates a complex mix of preferences and behaviors among classmates.

5. Distance From Home to Campus Continues to Shrink

When this study was first conducted in 2012, 44% of online college students chose a school within 50 miles of their residence. However, in 2019, 67% of online college students are enrolling at schools within 50 miles of their residence, and 44% of those students live within 25 miles of their school.

6. Career Services Are Popular, Especially Among First-Generation Students

Online students use the full gamut of career services during and after their enrollment. Only about one-quarter to one-third report not using career services. However, this study found that students who are first in their family to pursue higher education are more likely to use career services. For instance, first-generation online college students are statistically more likely to seek internship search help (70% vs. 59%), attend a school-sponsored job fair (66% vs. 55%), or attend an alumni networking event (67% vs. 57%) when compared to non-first-generation students.

7. Support Services Are Desirable

About one-fourth of current online students reported that they use school support services such as child care, financial management, and mental health services. A similar percentage indicated they do not use these services, and the remaining 50% indicated they would use these services if available.

8. School Selection Is Most Influenced by Third-Party Resources

The three most influential sources in the school selection process are online reviews (35%), college search/ranking websites (33%), and friends or family (30%). Various forms of direct advertising are considerably less influential. In a related question for this and past surveys, reputation of the school and/or program consistently appears as one of the top two factors for selecting a school.

9. The Need for Convenience Is Growing

The majority of online college students at the undergraduate (51%) and graduate (70%) levels are employed full time, and 41% of all online students are parents. In recent years, slightly more than 60% of online students were enrolled full time, which jumped to 71% this year. According to U.S. Department of Education guidelines, a typical full-time student needs to dedicate about 30 hours per week to their studies, which is a substantial time commitment for full-time workers. This demonstrates why one-third of students are willing to pay higher tuition for a program that offers more convenience in regard to scheduling and format.

10. Cost Continues to Be a Key Factor

Affordability is the top factor for students who are choosing an undergraduate program. For graduate students, affordability ties with reputation as the top factor. One-third of all students chose the least expensive school, and 20% said that figuring out how to pay tuition was the hardest part of enrolling in a program. For many students, receiving a relatively small incentive – like a free course – can influence their decision-making process.

EMERGING TRENDS TO WATCH

This study identified three trends emerging in online education. First, an increased number of undergraduate students enrolled in arts and humanities programs and STEM programs. While the five percent enrollment increase in these programs is not statistically significant, it warrants observation.

Second, the share of male students in the survey population increased 10 percentage points this year. This may be a sampling anomaly or the result of growing interest among men in computers and IT programs and STEM programs, as interest increased this year for these male-dominated fields.

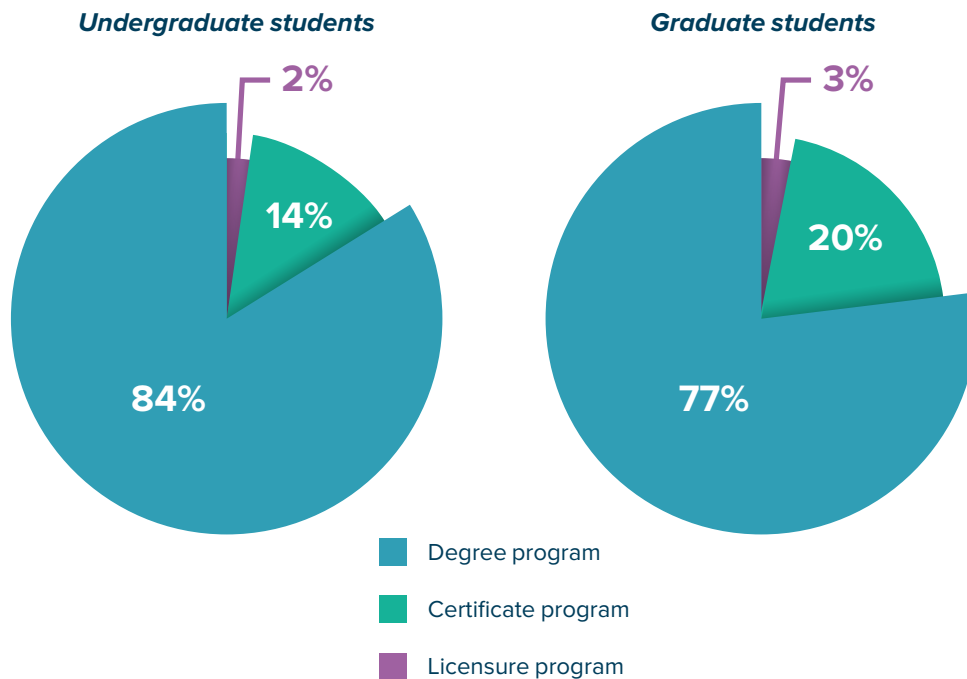
The third potential trend is an expected increase in online Hispanic students. The high school- and college-age Hispanic population in the United States is rapidly growing, and so are Hispanic high school graduation and college attendance rates (Fry & Parker, 2018). Despite rising college attendance, the percentage of Hispanics enrolled in online programs has held steady since 2012 at about 10%. This may stem from only 46% of Hispanics having access to broadband internet at home, while use of mobile devices is more common (Brown, López, & Lopez, 2016). As the percentage of college students who are Hispanic rises and access to broadband increases, online enrollments should follow suit.

SECTION 1:

WHAT ONLINE STUDENTS CHOOSE TO STUDY

TYPE OF PROGRAM

Although most online college students enroll in degree programs, 19% of respondents are interested in or enrolled in online certificate or licensure programs. Interest in certificate or licensure programs was more common for graduate students (23%) than undergraduates (16%).

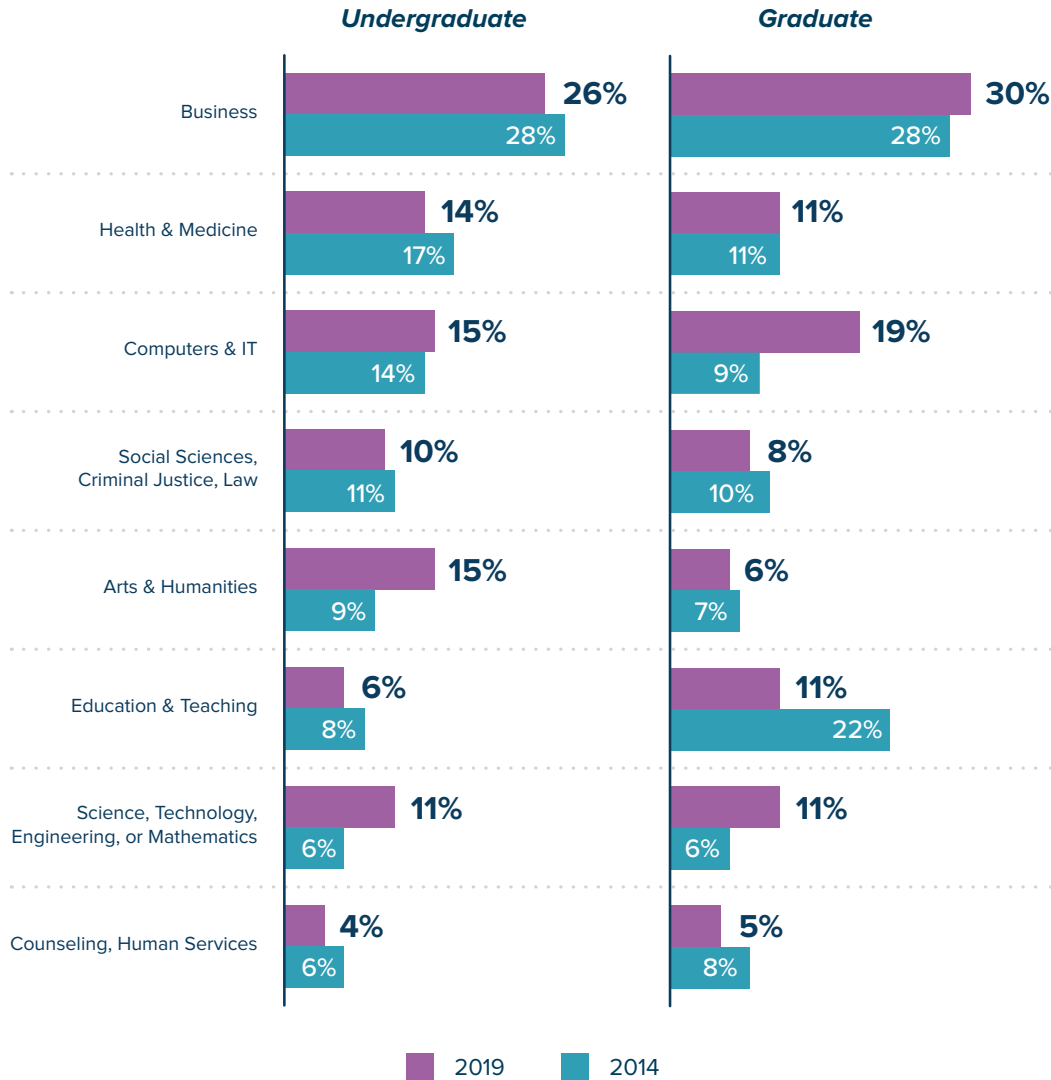


RECOMMENDATION:

Many undergraduate students enroll in certificate/licensure programs to earn a credential for an entry-level position. A cost-effective strategy for serving these students is to package three to five existing programs into a certificate that offers specific job knowledge or skills.

PROGRAM OF STUDY

As online learning matures, the industry is seeing a proliferation of online providers and the introduction of specialized programs. This is slicing the program pie into smaller pieces, as legacy programs lose students to niche fields of study.



At the graduate level, interest in computer and IT programs — which this study analyzed separately from other STEM fields — grew from nine percent in 2014 to 19% in 2019. There is a corresponding contraction in education and teaching programs, where interest plunged from 22% in 2014 to 11% in 2019.

Interest in online STEM programs at the undergraduate level increased from six percent in 2014 to 11% in 2019. Online enrollment in undergraduate arts and humanities programs also claimed modest gains, likely due to growing interest in communication and liberal arts degrees. However, growth in undergraduate STEM programs and arts and humanities programs are within this study's margin of error. Online business, health and medicine, and education programs also sustained slight declines.

Men are about three times more likely than women to choose a STEM field or computers and IT program, according to the 2019 data. More men participated in the 2019 survey than in previous years, which could contribute to increased interest in these fields. Women are about three times more likely than men to choose health and medical fields, which are fields that declined in this year's survey.

RECOMMENDATION:

Schools should not abandon legacy programs despite stagnating enrollments. Instead, they should identify unique features of their legacy programs to differentiate from options offered by other schools, such as cost or career services offered. At the same time, schools should analyze niche programs to assess how their institutional strengths match those specialized fields. There is less competition in some of these specialized areas, but students likely want to enroll in an online program that has a strong reputation in that field.

PRIOR COLLEGE EXPERIENCE

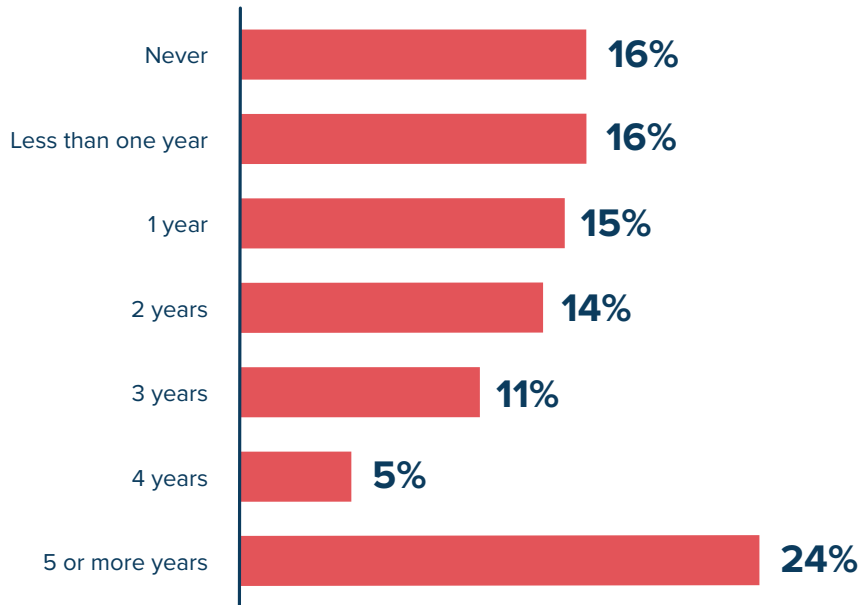
Undergraduate Students

Most respondents (87%) had transfer credits when they began their latest undergraduate online program. In fact, more than one-quarter (28%) had credits that equal or exceed what is required for an associate degree.

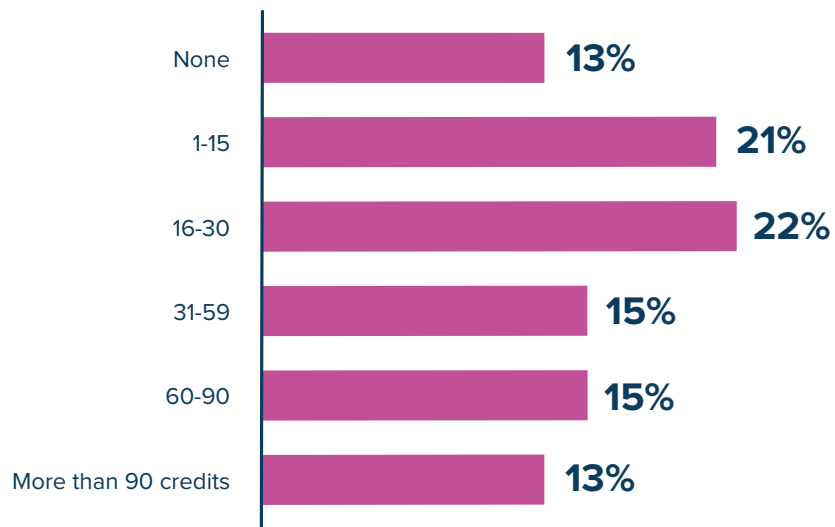
Forty-five percent of undergraduate students were previously enrolled in college within the past two years, and one in five were enrolled five or more years ago. In addition, 13% of current undergraduate students had never taken college classes before. This segment of beginners is represented by students of multiple generations.

Of the undergraduate respondents with prior college experience, 55% earned all past credits from one school. About half (51%) earned credits through a mix of online and face-to-face courses, and 15% earned all past credits in fully online courses.

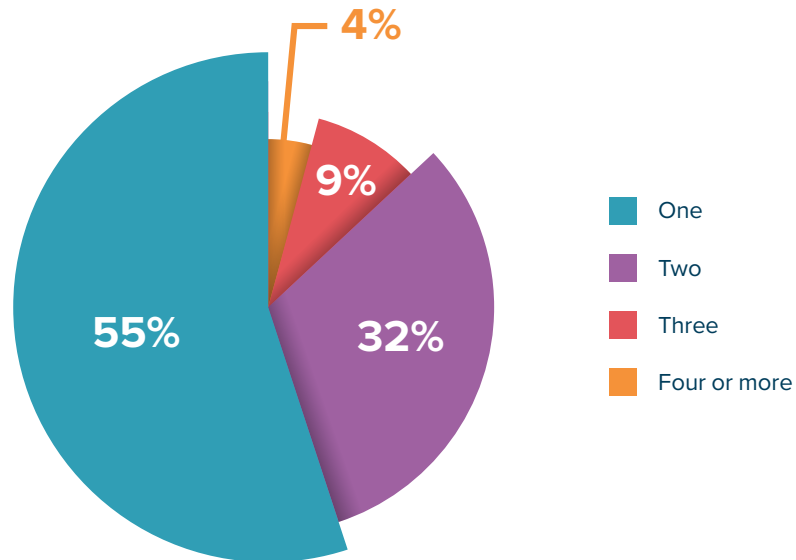
How long has it been since you were last enrolled in undergraduate study?



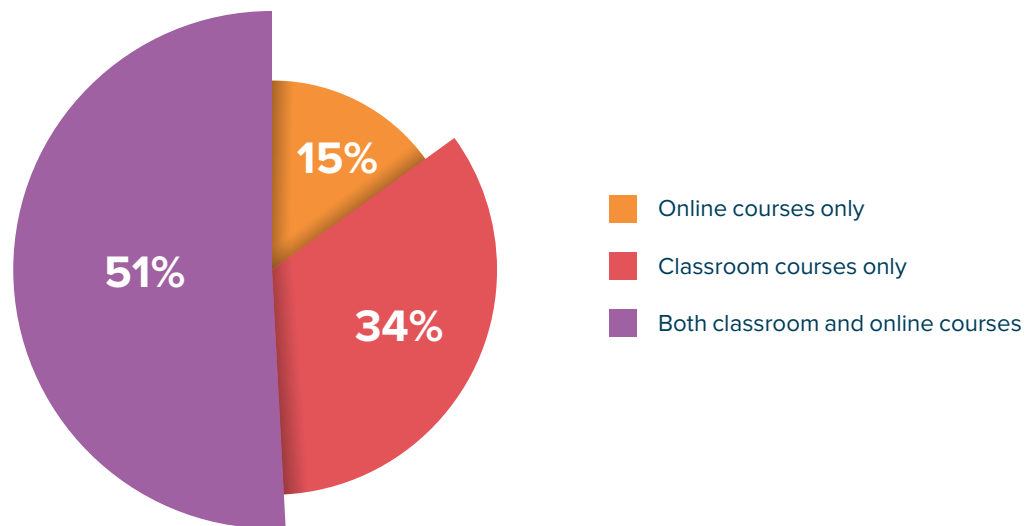
How many undergraduate credits had you accumulated prior to enrolling in your most recent fully online program?



At how many institutions have you previously earned undergraduate credit?



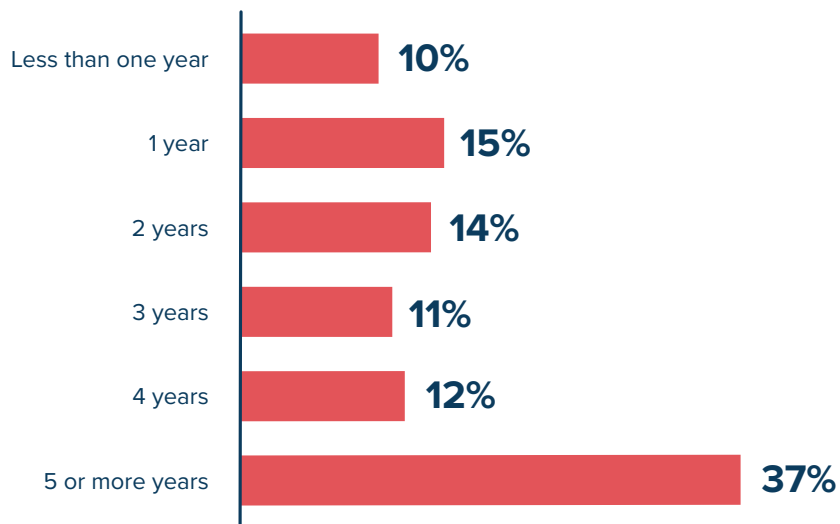
How were those credits earned?



Graduate Students

At the graduate level, 39% of online students were enrolled in an undergraduate program within the last two years. A near equal number (37%) were previously enrolled five or more years ago.

How long has it been since you were last enrolled in undergraduate study?

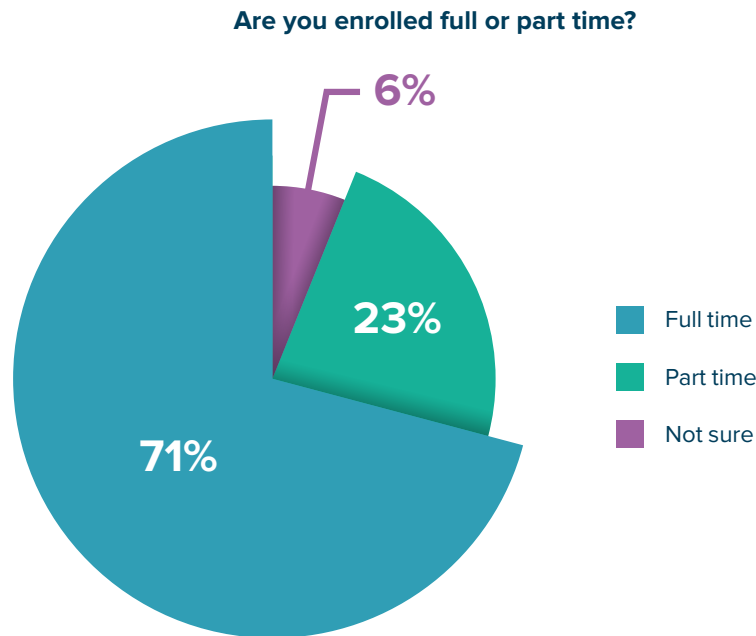


RECOMMENDATION:

The education history of online college students varies considerably, which presents opportunities and potential stumbling blocks for schools. Advisors should tailor their guidance to a learner's experience, and schools should provide support services that target students of different backgrounds, such as intensive advising for first-generation students and technical support for older students without online experience.

TIME AND MOTIVATION

Seventy-one percent of respondents attend school full time. This falls in line with historic data showing online learners want to graduate as soon as possible. With 59% working full time and 18% working part time, students must juggle their job responsibilities with heavy class loads.

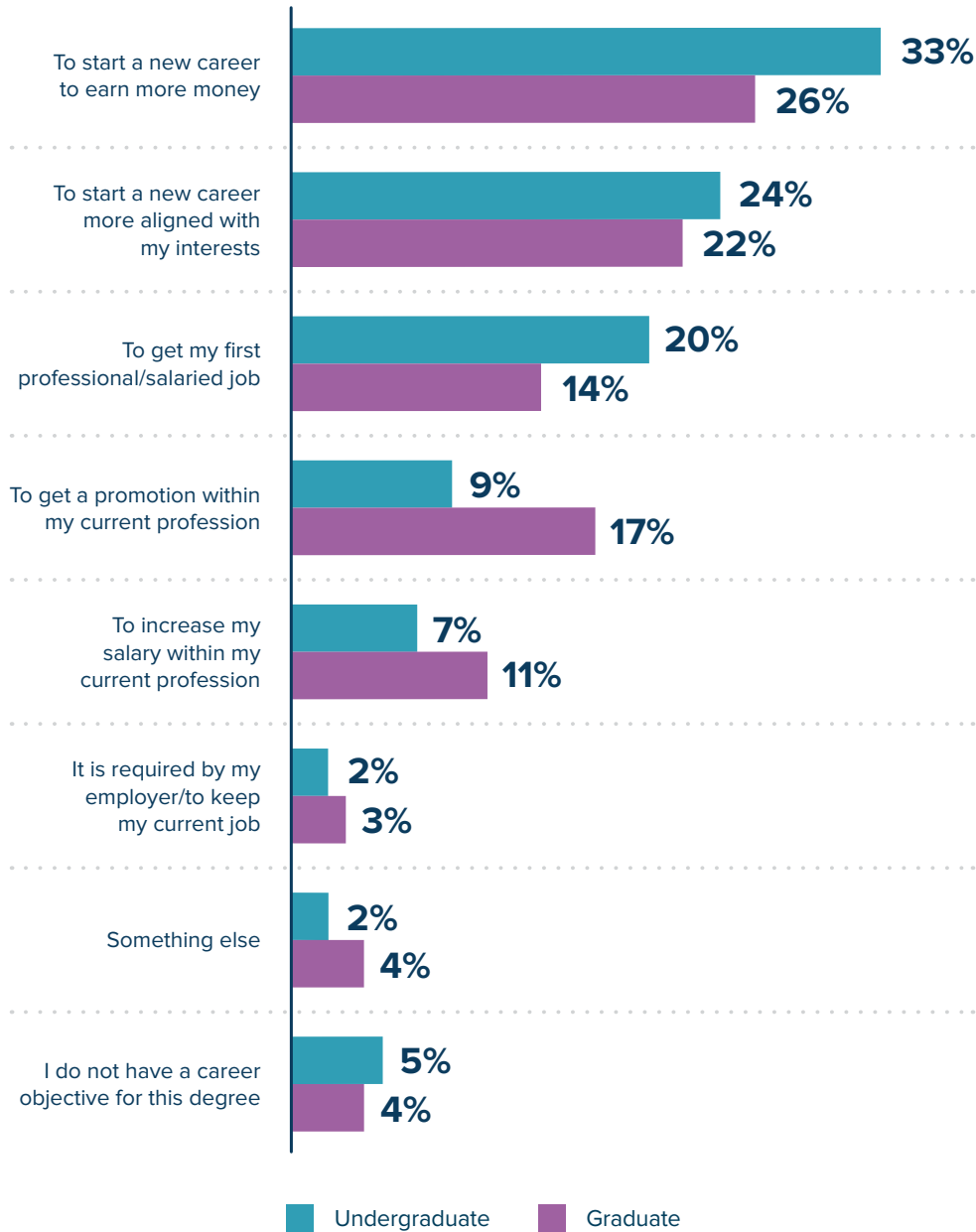


RECOMMENDATION:

Online students tend to have full schedules, so anything a school can do to help students save time is beneficial. This includes simplifying the enrollment process by acquiring transcripts on behalf of transfer students and offering to help students complete financial aid forms. To aid current students, schools can provide audio versions of textbooks and reading assignments that students can listen to during their daily commute. In addition, using a mobile-accessible learning management system (LMS) enables students to participate in discussion forums and complete assignments via smartphone or tablet during short periods of downtime. Finally, back-to-back scheduling of courses across 12 months promotes timely completion.

Ninety-three percent of online college students join a program to fulfill career aspirations. Fifty-three percent enroll in an online program with the goal of starting a new career, and 18% are preparing for their first professional job. These goals are particularly common for undergraduates, while graduate students tend to pursue promotions and higher salaries.

What is your career objective for this online degree?



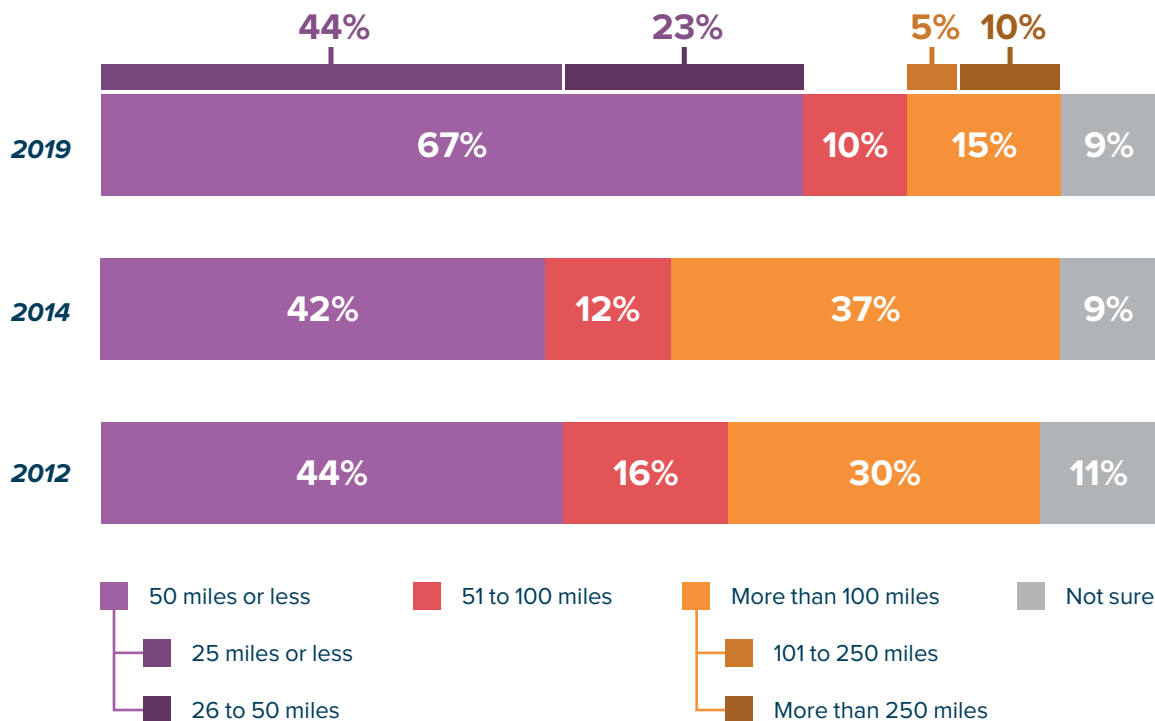
SECTION 2:

THE ONLINE COLLEGE STUDENT'S DECISION-MAKING PROCESS

STAYING LOCAL

Though online learning allows students to attend classes anywhere they have internet access, a growing majority of online students are choosing a nearby school. Since the first edition of this report in 2012, the distance between a student's home and school has steadily contracted. During the past five years, the number of online students choosing a school within 50 miles of home grew from 42% to 67%. At the same time, the portion of students choosing a school more than 100 miles from home fell from 37% to 15%.

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



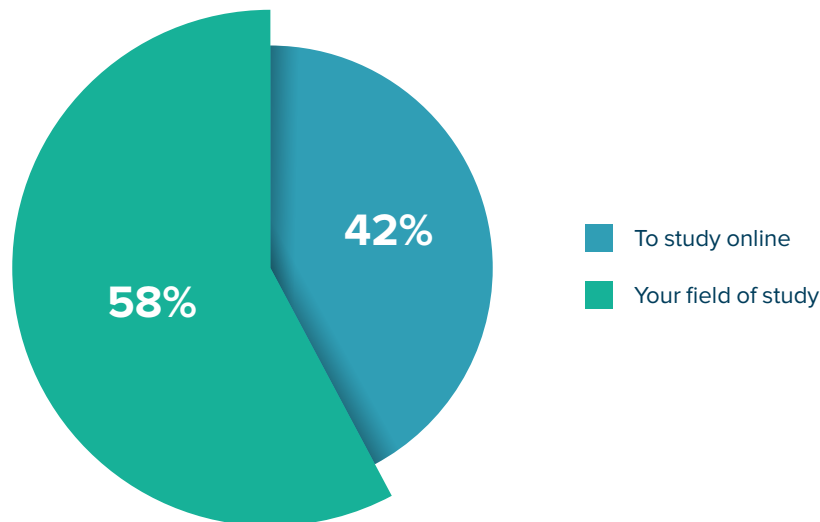
RECOMMENDATION:

The growing number of schools offering online programs provides students with more options closer to their home. Local schools have greater visibility among employers and others in the community, which is valuable to students. Data indicates that many students would like to visit campus and schools should engage this group by inviting them to campus events such as meetings with faculty and staff or extracurricular activities.

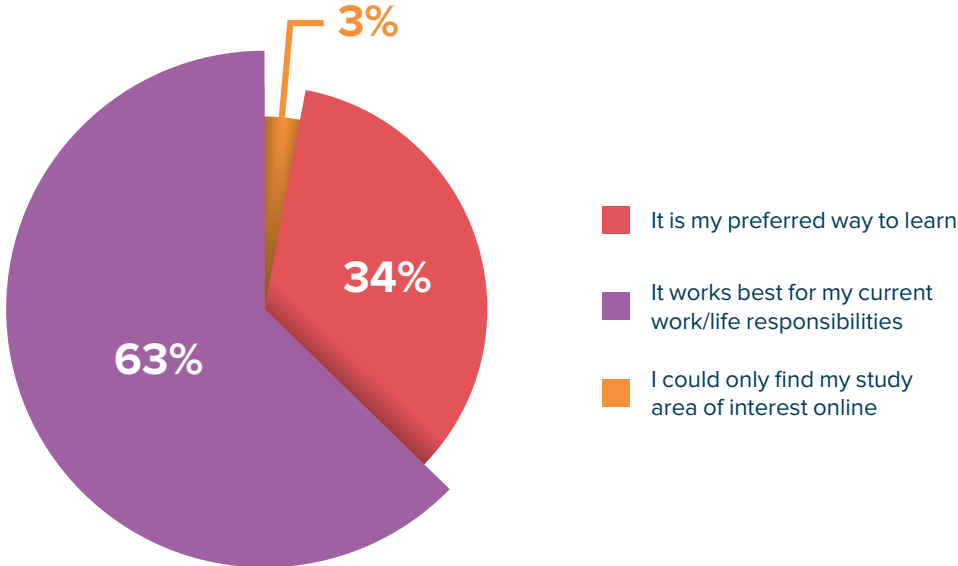
FIELD OF STUDY MATTERS MORE THAN MODALITY

The majority of online college students (58%) identified their desired field of study before they decided to study online. The flexibility of online learning is one of its major draws, as 63% of students said the modality works best for their responsibilities. In addition, 63% of respondents would have enrolled in on-campus classes if their field of study wasn't offered online. This demonstrates the appeal of online programs, as most have an on-campus counterpart that students could have chosen. When students answered this question in 2013 and 2014, only 30% would have attended an on-campus program if studying online was not an option.

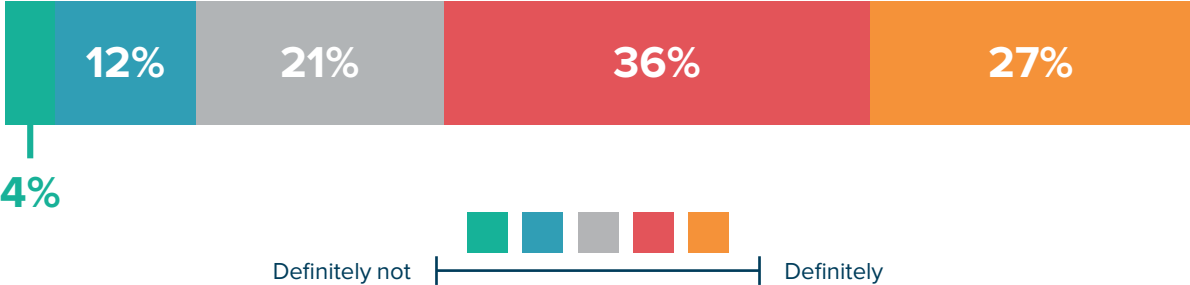
What did you decide first?



What drove your decision to study online?



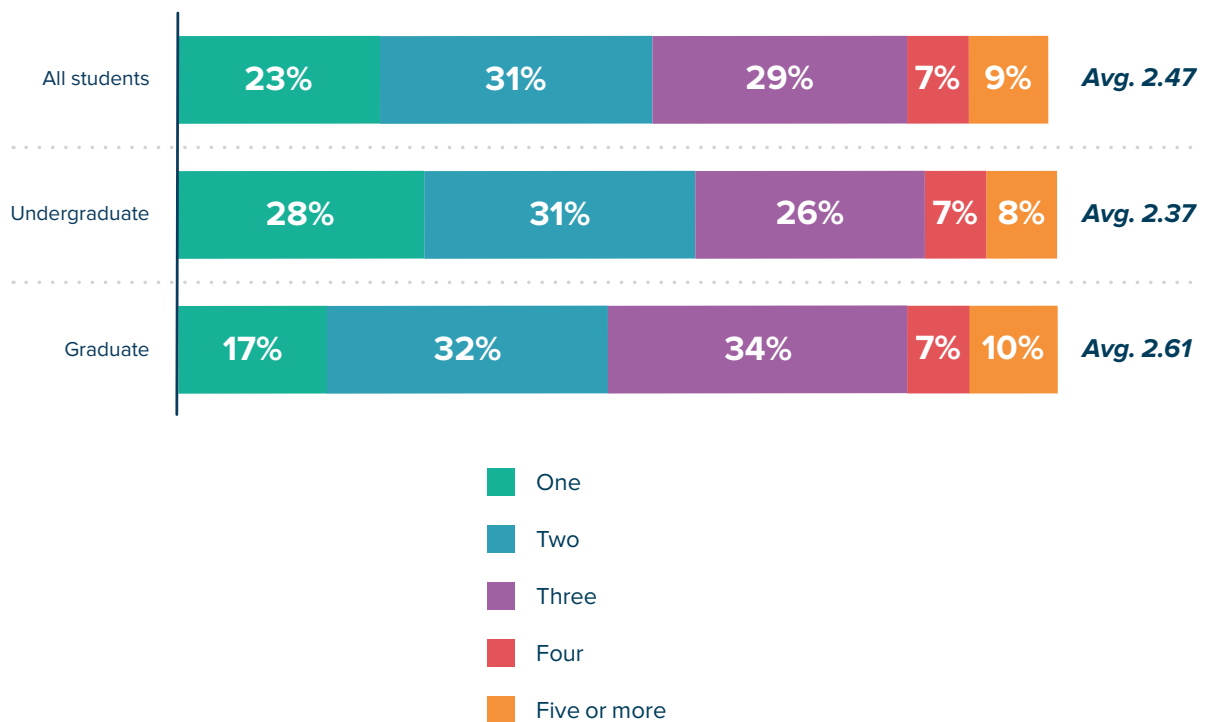
If the program you wanted was not available in an online format, how likely is it that you would have enrolled in a classroom program?



NUMBER OF SCHOOLS CONSIDERED

Before students apply to an online program, 60% contact two or three schools for information. On average, students contact 2.47 schools, with graduate students averaging 2.61 contacts compared to 2.37 for undergraduates. In the past five years, the percentage of students who only contacted one school declined from 33% to 23%. This indicates students are doing more research before they apply.

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



RECOMMENDATION:

One-quarter of online college students reach out to only one school, which makes the first contact a precious resource. Enrollment teams must rapidly respond to students, and school websites should feature comprehensive, easy-to-find information. Past surveys found that students want to review details about financial aid and transfer credits before they apply. Therefore, schools should make this information readily available on their website. Websites should also deliver an optimal user experience and provide an easy way for students to contact the school via their preferred communication method.

MOST IMPORTANT FACTORS IN THE DECISION-MAKING PROCESS

Since 2015, cost has been the top factor in the online college student's decision-making process. This year, 60% of undergraduates selected affordability as a top three factor, as did 46% of graduate students. Although reputation is the second most important factor, it lags far behind affordability for undergraduate students. However, graduate students rank reputation (39%) and affordability (46%) relatively close. In addition, the quality of faculty is significantly more important to graduate students than undergraduate students (34% vs. 20%). Factors ranking in the top three for more than one-quarter of online college students include whether the program offered the quickest path to a degree (this may be due to transfer credits or accelerated courses or year-round study) and the ability to switch between online and face-to-face courses.

<i>What are the most important factors in your decision about which school to choose for an online program? (Select top 3)</i>	Undergraduate	Graduate
Affordability	60%	46%
Reputation of the school/program	39%	39%
Offered quickest path to a degree	31%	29%
I can take both online and on-campus courses during my program	28%	24%
Proximity to where I live or work	21%	20%
Had favorable admissions requirements	21%	18%
Quality of faculty	20%	34%
The school's mission/values align with my values	17%	19%
Positive interactions with staff during search process	16%	16%
Familiarity with the school	16%	13%
Recommendation from people I respect	13%	17%
Alumni achievements	8%	10%
My employer had a relationship with the school	8%	11%
Something else	2%	2%

RECOMMENDATION:

Cost is critical. Half of online college students include affordability in their top three factors for selecting a school. In addition, one in five say that determining how to pay for school is the hardest part of the enrollment process. Therefore, if a school is not the least expensive provider in its market, it should promote its value proposition to show added benefits that validate higher costs. Another option is to find ways to reduce the total cost of a program outside of tuition.

INFLUENTIAL FACTORS

When online college students consider which school to attend, they are mostly influenced by online reviews (35%), college search/ranking websites (33%), and recommendations of friends or family (30%). Fewer students are most influenced by paid marketing initiatives, such as direct mail (12%), email (11%), TV spots (10%), and Google advertising (10%). Five percent of respondents say that something else influenced their decision, with many reiterating that their decision boiled down to affordability.

<i>What was most influential in selecting a school? (Select up to three)</i>	All students
Online reviews	35%
College search/ranking websites (eLearners.com, ClassesUSA.com, U.S. News & World Report, etc.)	33%
Recommendations of friends or family	30%
College fair or event	14%
Community college I attended	12%
Direct mail from the school	12%
Emails from the school	11%
TV commercials about the school	10%
Online advertisements on Google	10%
Online advertisements on social media (Facebook, YouTube, Instagram, etc.)	10%
People or groups I follow online	9%
My employer	8%
Radio commercials about the school	2%
Something else	5%

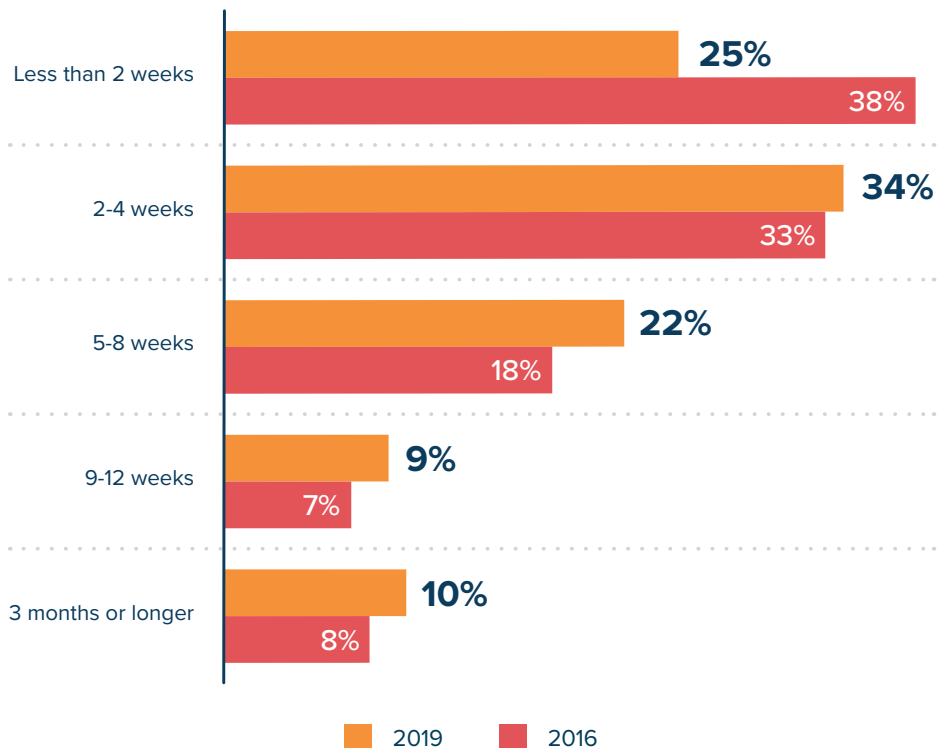
RECOMMENDATION:

Schools must monitor the numerous websites and publications that review and rank colleges, as students value this information. Generally, schools should place a premium on all third-party recommendations, as students find them much more influential than paid advertising.

APPLICATION TIMELINE

Most online college students complete an application for an online program within two months of starting their search process. However, many students are taking longer to decide than in previous years, as the portion of students who apply within two weeks declined from 38% in 2016 to 25% in 2019. Even so, 59% of students apply to at least one school within four weeks. Graduate students usually take longer to apply, as only 51% apply within one month of starting their search, compared to 64% of undergraduates.

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



SECTION 3:

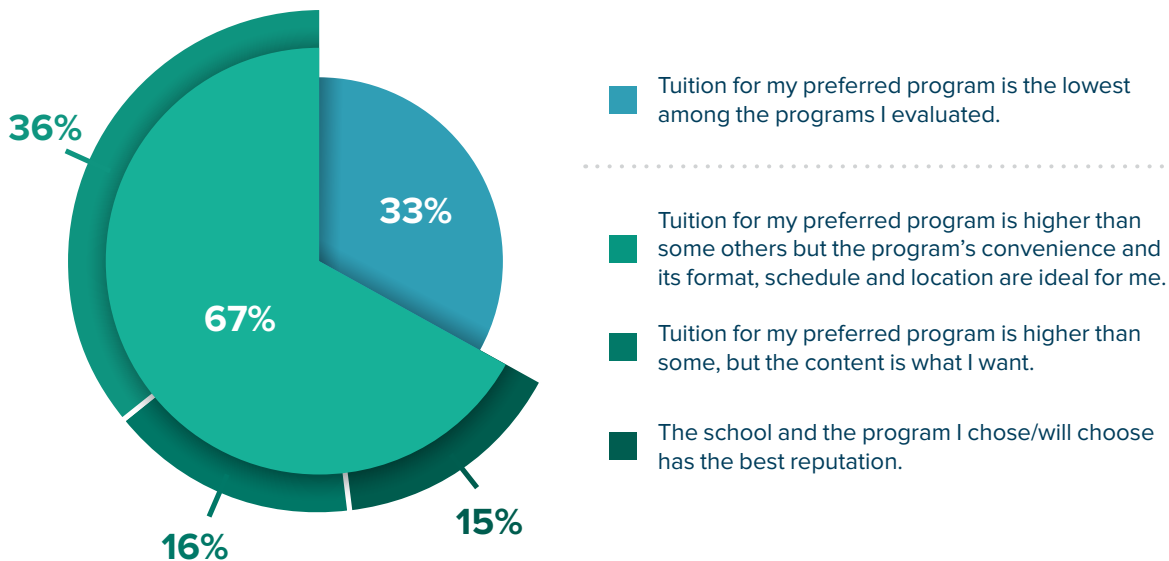
FINANCING EDUCATION FOR THE ONLINE COLLEGE STUDENT

PRICE VERSUS OTHER FACTORS

While online college students emphasize affordability, other factors could spur them to pay more for tuition. Possibilities include convenience, preferred programmatic content, and reputation.

In 2017, 74% of respondents said they would select a more expensive program if it offered more convenience, preferred programmatic content, or a strong reputation. This year, only 67% of respondents answered this way. Convenience (36%) now matters more than content (16%) and reputation (15%), with one-third of students defaulting to the program with the lowest tuition.

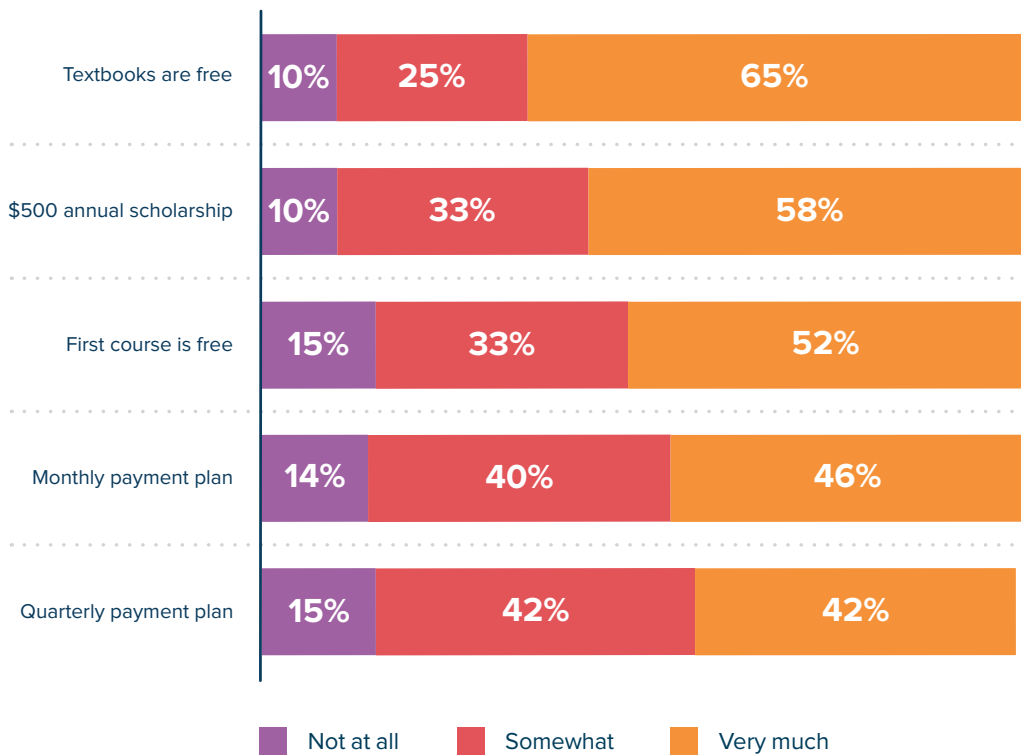
Which statement about tuition is the closest to how you made your enrollment decision?



THE INFLUENCE OF FINANCIAL INCENTIVES

"Free" items like textbooks, courses, scholarships, and payment programs are attractive to cost-conscious students. Between 85% and 90% of respondents said these options would "somewhat" or "very much" impact their decision to enroll. However, payment plans are less enticing than free textbooks and scholarships.

To what extent would each of the following be likely to impact your decision to choose one online program over another?



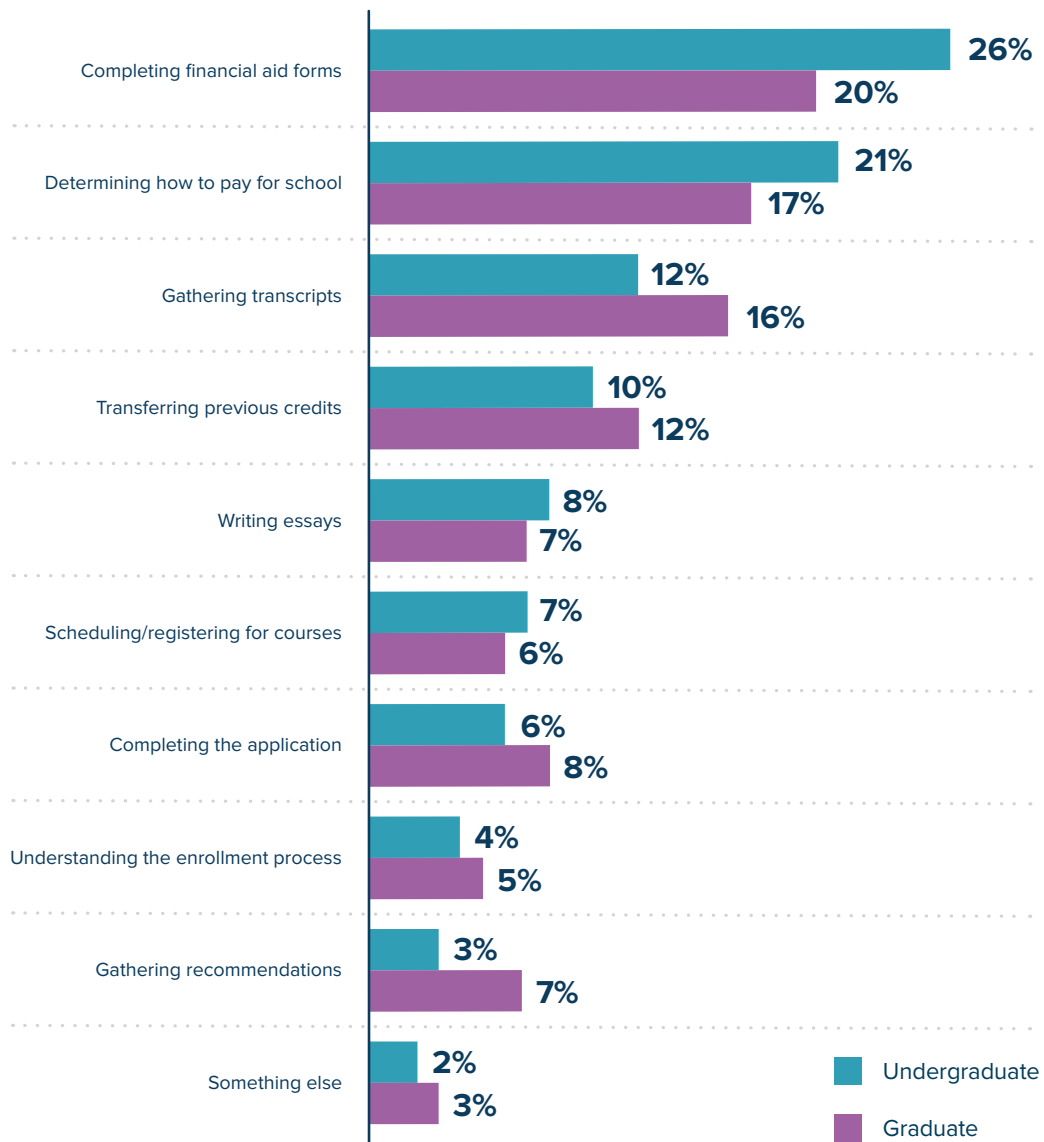
RECOMMENDATION:

Affordability is so important to online college students that inexpensive incentives can influence enrollment decisions. Cost-effective options include payment plans or using open education resources (OER) to negate textbook fees. Additionally, small scholarships (about \$500) or free courses could attract additional enrollees. Typically, the lifetime value of an enrollee far exceeds the costs of these initiatives. As such, school leaders should consider offering each of these cost-effective incentives to net more students.

HURDLES IN THE ENROLLMENT PROCESS

Undergraduates are more likely than graduate students to struggle to complete financial aid forms. This may be because graduate students acclimate to the enrollment process when they earn their undergraduate degree. Another explanation may be that fewer graduate students rely on financial aid to pay tuition. Determining how to pay for an online program can be an obstacle for undergraduate (21%) and graduate students (17%) alike. Also, 10% or more of all online students struggle to gather transcripts and transfer past credits to a new program.

What was the most difficult part of the enrollment process?



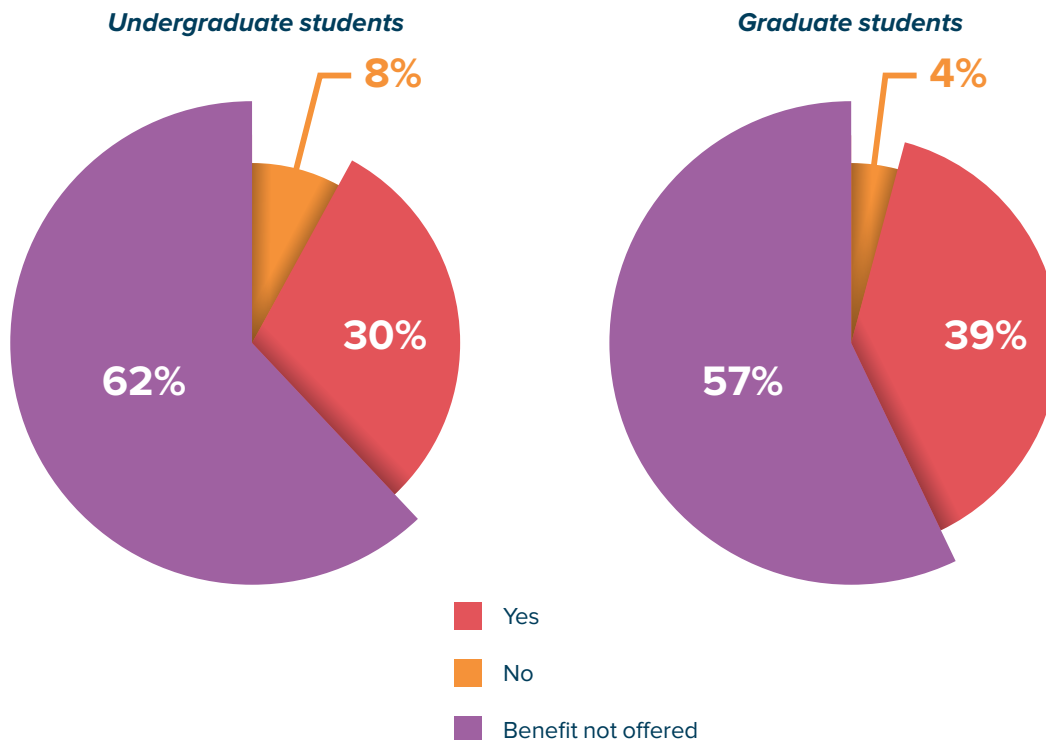
RECOMMENDATION:

Although online college students now take slightly longer to apply than in past years, most students select a school relatively quickly. To efficiently serve this eager population, schools must be highly responsive to student needs and do as much as possible to streamline the admission process. This includes assisting with tasks that some students find difficult, such as completing financial aid forms, collecting transcripts, and fulfilling transfer credit requirements.

TUITION REIMBURSEMENT

About one-third of online college students are reimbursed tuition by their employer while 40% of respondents said their employer offers such a benefit. Of all respondents who had this benefit, 85% took advantage of it. Twenty-eight percent of online graduate students say their employer and school partner to offer discounted tuition, but these discounts are available to only 17% of undergraduates.

Did you use employer tuition reimbursement? [Employed full or part-time]



<i>Does your school offer tuition discounts for employees at your company? [Employed full or part-time]</i>	Undergraduate	Graduate
Yes	17%	28%
No	57%	54%
Unsure	27%	19%

RECOMMENDATION:

Partnering with businesses to offer tuition discounts to employees can be an effective recruiting tool. Moreover, online alumni can be an effective resource for establishing these partnerships. Nearly half of online college students intend to take classes after graduation, and one-third plan to refer potential students to their alma mater and/or join their alumni association. These extended relationships can help schools form partnerships with companies that employ their alumni.

SECTION 4:

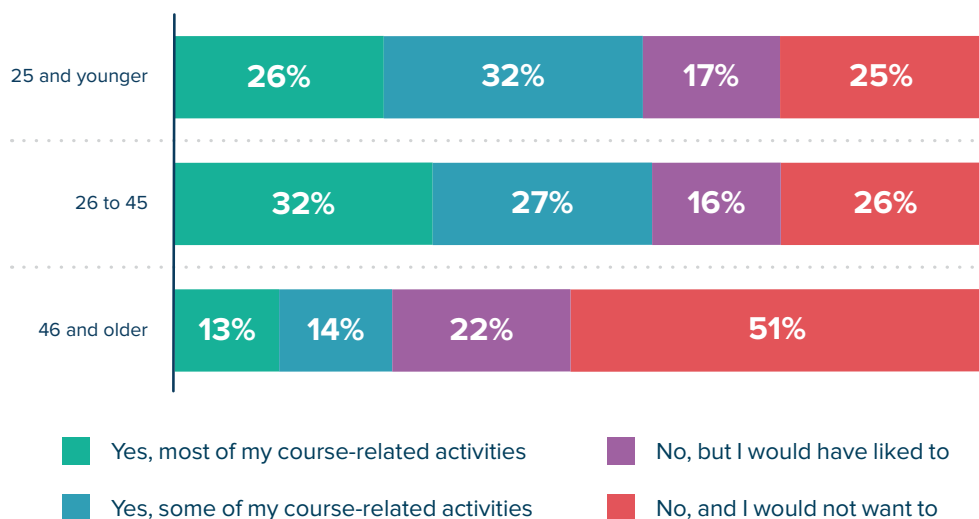
THE ONLINE COLLEGE STUDENT IN THE CLASSROOM

USING MOBILE DEVICES FOR ONLINE EDUCATION

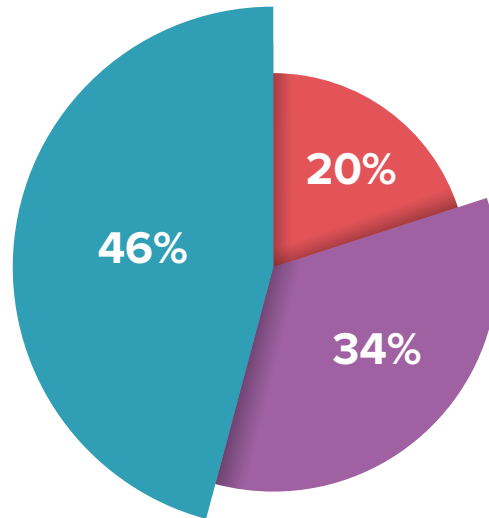
The majority of online college students are using or want to use mobile devices to access online classrooms and complete activities. Fifty-six percent of online college students use a smartphone or tablet to complete at least some of their online course-related activities. Graduate students (63%) are significantly more likely than undergraduates (52%) to use a mobile device in conjunction with online courses. An additional 17% of current or past online students would have liked the option to complete activities using a mobile device. These preferences are comparable to what prospective online college students reported, as 66% would like to complete at least some course-related activities on a mobile device.

There is a clear demarcation between younger and older students regarding mobile use. About 60% of students age 45 and younger use a mobile device for some or all online coursework, but only 27% of students 46 and older agree.

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



Would you want to complete any online course-related activities using your mobile device (phone/tablet)?



- Yes, most of my course-related activities
- Yes, some of my course-related activities
- No, and I would not want to

RECOMMENDATION:

There is a strong division between students who want to use mobile devices for class activities and those who do not. A red flag is that 17% of current students would like to use a mobile device but do not, likely because their school uses a learning management system (LMS) that is not mobile-friendly. To meet the needs of students, schools without a mobile-friendly website and LMS should modernize their systems soon.

Checking grades, due dates, and schedules is the top reason current and past students (68%) use their mobile device for online courses. And 74% of prospective students would use their mobile device for the same purpose. Prospective students also want to use mobile devices to communicate with professors (55%) and other students (50%). Other top reasons that current and past students used mobile devices include completing course-related readings (44%) and watching videos (36%).

<i>During your online studies, when did you use a mobile device (a phone/tablet but not a laptop)? (Select all that apply)</i>	Current and past students
Checking grades, assignment due dates, or course schedules	68%
Completing digital readings	44%
Completing videos or other multimedia learning	36%
Communicating with professors	35%
Researching additional information	32%
Completing practice activities	28%
Communicating with other students	26%
Completing graded activities	24%
Participating in a discussion forum	24%
Something else (please specify)	0%

<i>During your online studies, when would you want to use a mobile device (a phone/tablet but not a laptop)? (Select all that apply)</i>	Prospective students
Checking grades, assignment due dates, or course schedules	74%
Communicating with professors	55%
Communicating with other students	50%
Completing videos or other multimedia learning	40%
Completing digital readings	39%
Completing practice activities	37%
Researching additional information	35%
Participating in a discussion forum	30%
Completing graded activities	25%

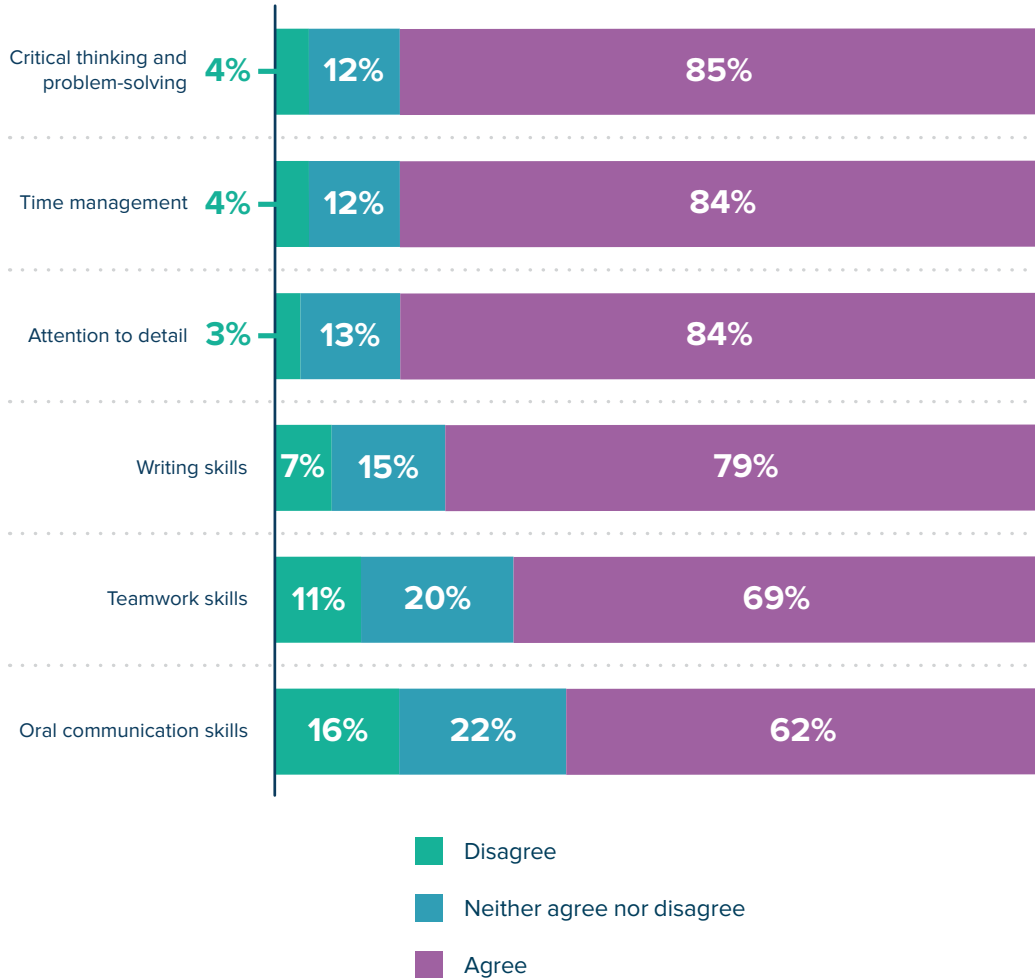
SOFT SKILLS DEVELOPMENT

The survey asked students and recent graduates if their programs taught specific soft skills that employers value. Then the survey asked students if their skills in each area improved as a result of their online program. At 63%, critical thinking is the skill taught most often during online instruction. About half of students report learning writing skills, time management, and attention to detail. Slightly more than one-third of students learned teamwork and oral communication skills.

Although respondents report that many programs did not teach all skills, a majority of students say their skills improved as a result of their online education. About 85% agree that their program improved their attention to detail, time management, and critical thinking skills. An additional 79% say their writing skills improved. A lower percentage of students improved their teamwork (69%) and oral communication (62%) skills in their online program.

<i>Which skills did your online program teach you? (Select all that apply)</i>	Past students
Critical thinking and problem-solving	63%
Writing skills	52%
Time management	51%
Attention to detail	49%
Teamwork skills	38%
Oral communication skills	36%
None of the above	3%

**How strongly do you feel your online program improved these skills?
[Current and past students]**



RECOMMENDATION:

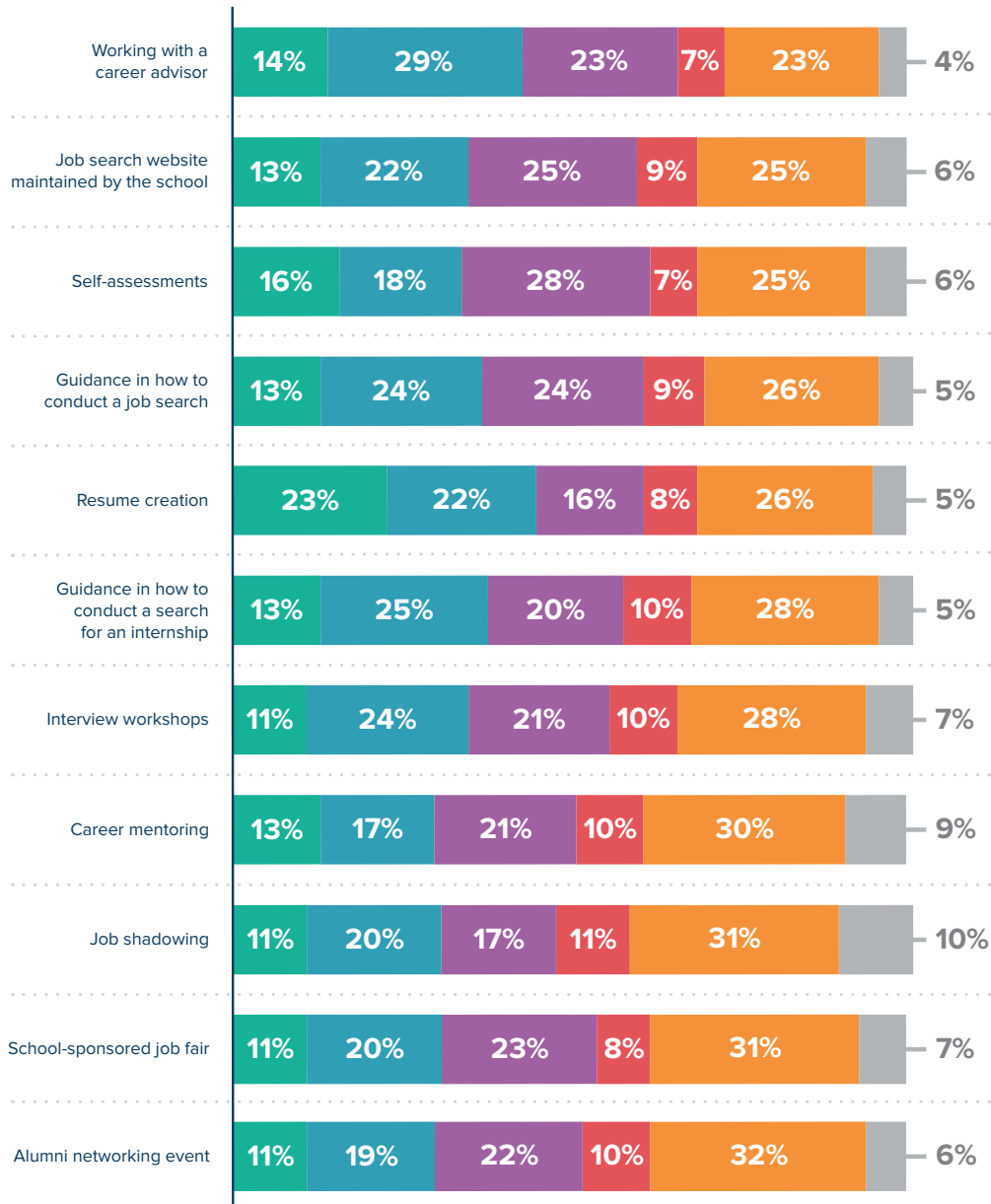
Students can improve soft skills even if their online program doesn't teach them overtly. Instructional leaders can help students acquire these important skills by designing courses with lessons that teach skills directly. Course and lesson design should also identify why employers value these skills and demonstrate to students the importance of learning these skills. This knowledge could empower students who are seeking their first professional job, a career change, or a promotion.

CAREER SERVICES

Even though many online college students are employed full time, they still value and use career services. A large portion of respondents used or plan to use services listed in this survey if the services are offered by their school. In addition, this survey found that minority and first-generation students use these services more often.

The survey explored how respondents use 11 different career services. Résumé creation (23%) is the most popular service that past students used early in their academic career. For students nearing graduation, working with a career advisor (29%) is the most popular service. Throughout their time in school, self-assessments (28%), job search websites maintained by their school (25%), and job search guidance (24%) are used most. While usage of career services decreased after graduation, 10% or more of students are interested in help with internship placement, job interviews, job shadowing, career mentoring, and networking.

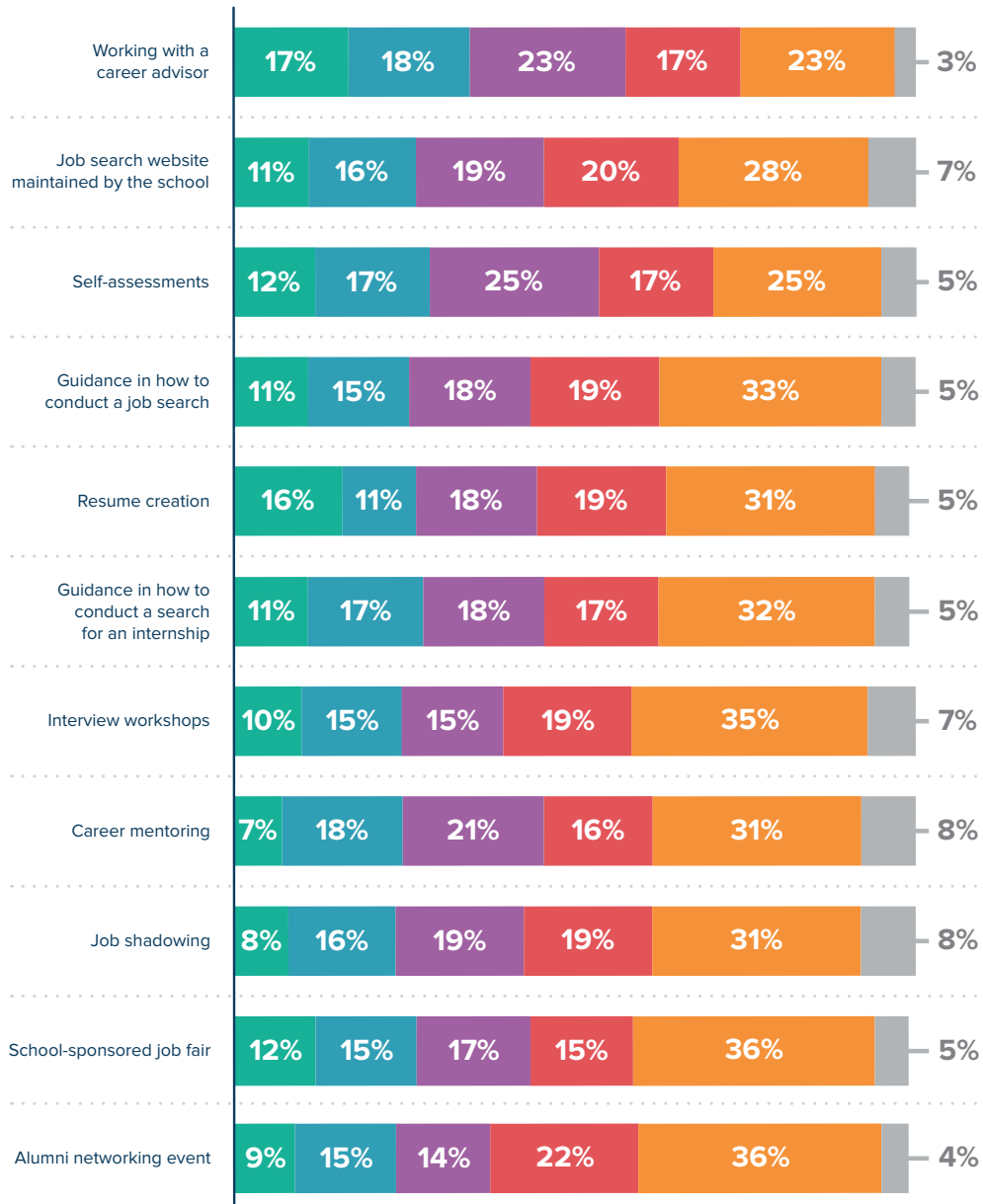
Which career services did you use, if any, during your most recent online program? [Past students]



- Used during the first or second semester of my studies
- Used toward the end of my studies closer to graduation
- Used intermittently throughout my studies
- Use or plan to use after graduation
- Did not use
- Not offered by my school

Top career services that current online college students intermittently use include self-assessments (25%) and career advising (23%). Like graduates, 23% to 36% of current students do not use services listed in the survey.

Which career services do you use, if any, during your online program? [Current students]



- Used during the first or second semester of my studies
- Used toward the end of my studies closer to graduation
- Used intermittently throughout my studies
- Use or plan to use after graduation
- Did not use
- Not offered by my school

RECOMMENDATION:

Although about one-third of online college students do not use career services, others use a variety while enrolled and after they graduate. First-generation and minority students use career services more often than others. As about one-quarter of online students are minority and one-third are first-generation students (proportions likely to increase over time), schools should communicate the availability of career services to these populations. About seven percent of students identified at least one career service that their school does not offer. In an increasingly competitive environment, such an oversight could place schools at a disadvantage.

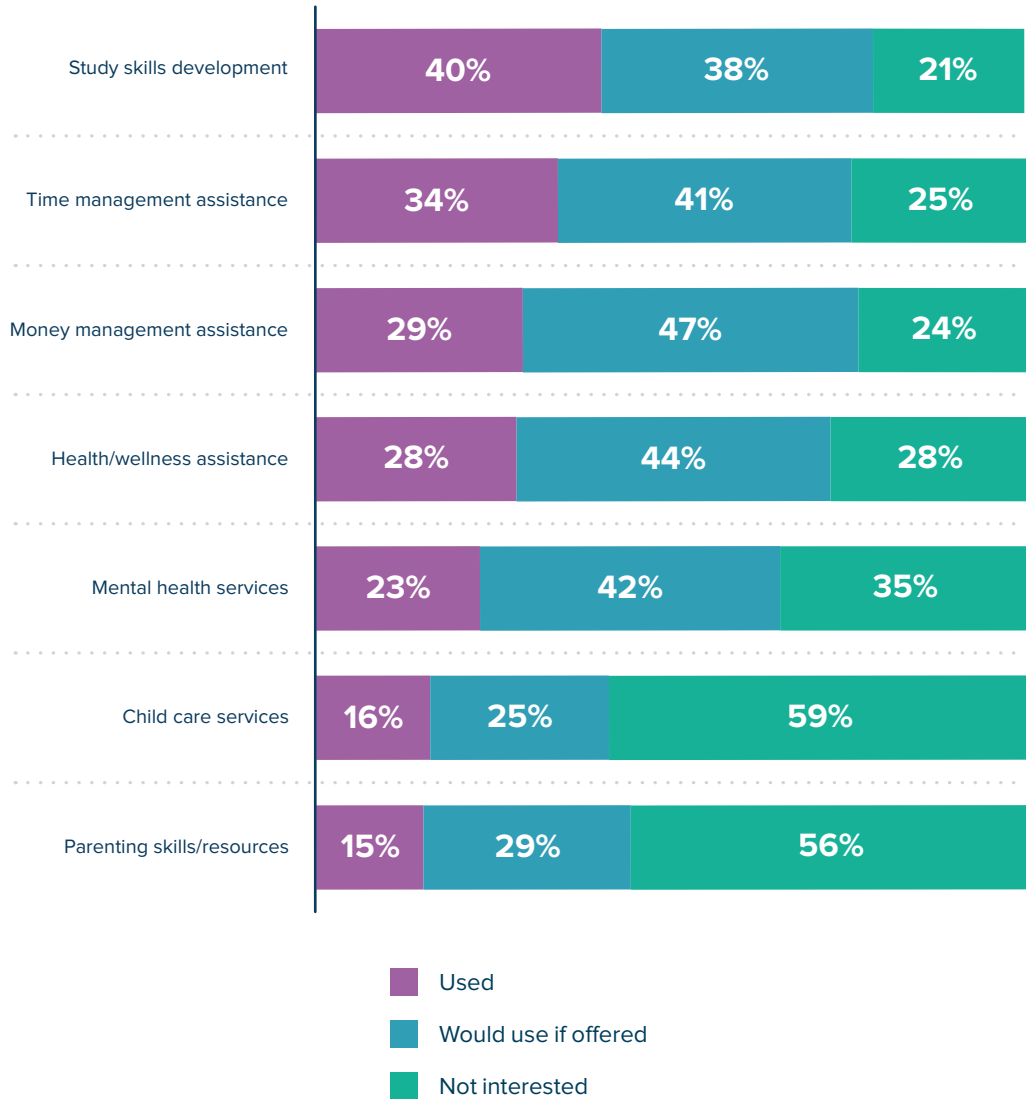
SUPPORT SERVICES

Since career services are popular among students, this year's survey was expanded to explore interest in other student support services offered by schools. Study skills development garnered the most interest, as 40% of current and past students used such a service. Time management (34%), money management (29%), and health/wellness assistance (28%) are the next most used support services.

At schools where services are not offered, at least 38% of current and past students would have used each service in the survey except for parenting skills/resources (29%) and child care services (25%). The majority of students are not interested in these two services, while about one-quarter have no interest in any services listed.

First-generation students are significantly more likely to use each of these services. For each service listed, except study skills development, first-generation students were 10% more likely to use the service than other students. Among prospective students, the largest areas of interest are money management (56%), study skills development (51%), time management assistance (46%), and health/wellness assistance (40%). Nearly 10% of prospective students are not interested in any services listed.

Which support services did you use, if offered, by the provider of your online program? [Current and past students]



<i>Which support services would you use, if offered, by the provider of your online program? (Select all that apply)</i>	Prospective students
Money management assistance	56%
Study skills development	51%
Time management assistance	46%
Health/wellness assistance	40%
Mental health services	31%
Child care services	16%
Parenting skills/resources	14%
Something else	0%
None of the above	9%

RECOMMENDATION:

Traditional thinking has been that online college students are adults who do not need the array of student support services provided to on-campus students. However, this survey found that online college students want a variety of support services. On average, one-quarter report using support services, and a significant percentage of respondents would use student support services if offered. By offering student support services to online learners, schools could gain a recruiting advantage, enhance the learning experience, and improve completion rates.

LEARNING OUTCOMES

Online students are positive about their classroom experience. Eighty-one percent of current and past students agree that their most recent course was compelling and interesting, and the same percentage feel their instructor presented materials effectively. A smaller majority (66%) report that discussion forums in their courses were engaging.

Recently, there has been a public debate about the value of a college education. In response, school leaders have taken steps to document the connection between a degree and meaningful employment. A 2017 survey explored this topic by asking 30,000 college students how well their school prepared them for the workforce (Gallup, 2017). Two of those questions appeared on the 2019 survey of online college students with similar results, as 75% of *all* college students in 2017 and 81% of *online* college students in 2019 affirmed they would graduate with the knowledge and skills to succeed in the workplace.

The 2017 Gallup survey also found that 63% of all college students said at least one professor, faculty, or staff member initiated a conversation about their career options. This is comparable to 71% of respondents to the 2019 *Online College Students* survey who answered the same way.

These conversations appear to have a positive impact. In the 2017 Gallup survey of all college students, 41% of students who had a conversation about career options were also very confident they would graduate with skills necessary for workplace success, while only 28% who did not have such a conversation were very confident. Similarly, the 2019 *Online College Students* survey shows that 49% of respondents who discussed career options with a professor, faculty, or staff member are confident they will be prepared to succeed at work, while only 21% who did not have that conversation are confident.

<i>Do you agree or disagree with the following statements about your online learning experience?</i>	Disagree	Neither agree nor disagree	Agree
The most recent online course I completed was interesting and compelling.	7%	12%	81%
I am confident I will graduate with the knowledge and skills I need to be successful in the workplace.	5%	14%	81%
The instructor effectively presented the material in my most recent online class so that I was able to learn.	4%	15%	81%
What I learned in my most recent online course I will be able to apply in my current or future workplace.	7%	17%	76%
At least one professor, faculty, or staff member has initiated a conversation with me about my career options.	13%	16%	71%
Discussion forums in my most recent online courses were engaging.	11%	23%	66%

RECOMMENDATIONS:

Students who have at least one conversation about career options with a faculty or staff member feel significantly more prepared for workplace success. Therefore, it is helpful for schools to create an environment and expectations for such conversations to happen. Online courses heavily rely on adjunct faculty, who may not be prepared to systematically initiate these conversations. However, academic advisors and career services staff can do this easily. By encouraging these conversations, schools could better prepare students for the workforce. This is important, as 47% of employers feel college graduates aren't ready to work and 51% believe colleges don't provide the right skills for graduates (Learning House & Future Workplace, 2018).

Discussion forums are a significant part of online courses, as students typically post and respond to other students' posts weekly. But only 66% of respondents say that forums are engaging, highlighting an opportunity for improvement. Ways to enhance discussion forums include using them for small group activities, replacing citation-based assignments with opinion pieces, incorporating thought-provoking topics, and encouraging instructors to contribute their opinions and examples.

SECTION 5:

THE IMPACT OF ONLINE PROGRAMS

POST-GRADUATION SUPPORT & ENGAGEMENT

As online programs mature, there is increasing interest in how schools can maintain a relationship with their growing population of online graduates. Nearly half of current students (47%) and past students (42%) are interested in taking courses at their alma mater in the future. About one-third plan to refer students to their school, and nearly one-quarter plan to join the alumni association or attend an on-campus event. Current students and graduates gave similar responses to these questions, indicating that students decide while enrolled what kind of relationship they plan to have long-term with their school.

<i>After graduating from your current online school/program, which of the following actions do you expect to take? (Select all that apply)</i>	Current students
Take classes there in the future	47%
Utilize career services	37%
Refer students to the school	35%
Join the alumni association	32%
Follow the school on social media channels	28%
Attend future college events (athletic, speaker series, etc.)	22%
Donate to the school	13%
I plan no relationship with my school in the future	11%

<i>Since graduation, which activities have you done or expect to do? (Select all that apply)</i>	Past students
Plan to take classes there in the future	42%
Refer students to the school	34%
Follow the school on social media channels	30%
Utilize career services	24%
Attend future campus events (athletic, speaker series, etc.)	22%
Join the alumni association	22%
Donate to the school	14%
I have no relationship with my school	16%

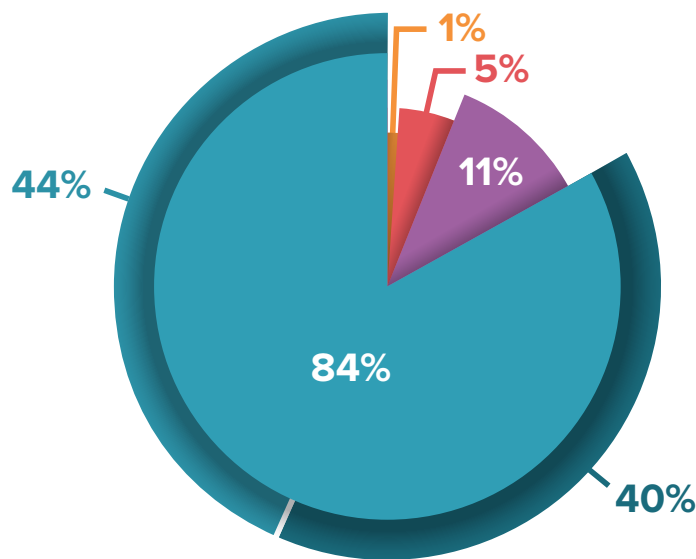
RECOMMENDATION:

The growing ranks of online alumni are a valuable resource. Recommendations from friends and family is one of the top factors that people consider when selecting a school. Alumni can also help form partnerships with companies where they work. Schools should develop forward-thinking strategies to effectively engage and leverage online graduates, drawing from communication preferences and other data gathered while students were enrolled.

THE PERCEIVED VALUE OF ONLINE LEARNING

Online programs have suffered a negative stereotype that they produce inferior outcomes compared to their face-to-face counterparts. However, the overwhelming majority of students dispute this perception. When asked to consider if their online education was worth its cost, 84% of respondents agree or strongly agree. By contrast, only six percent disagree or strongly disagree.

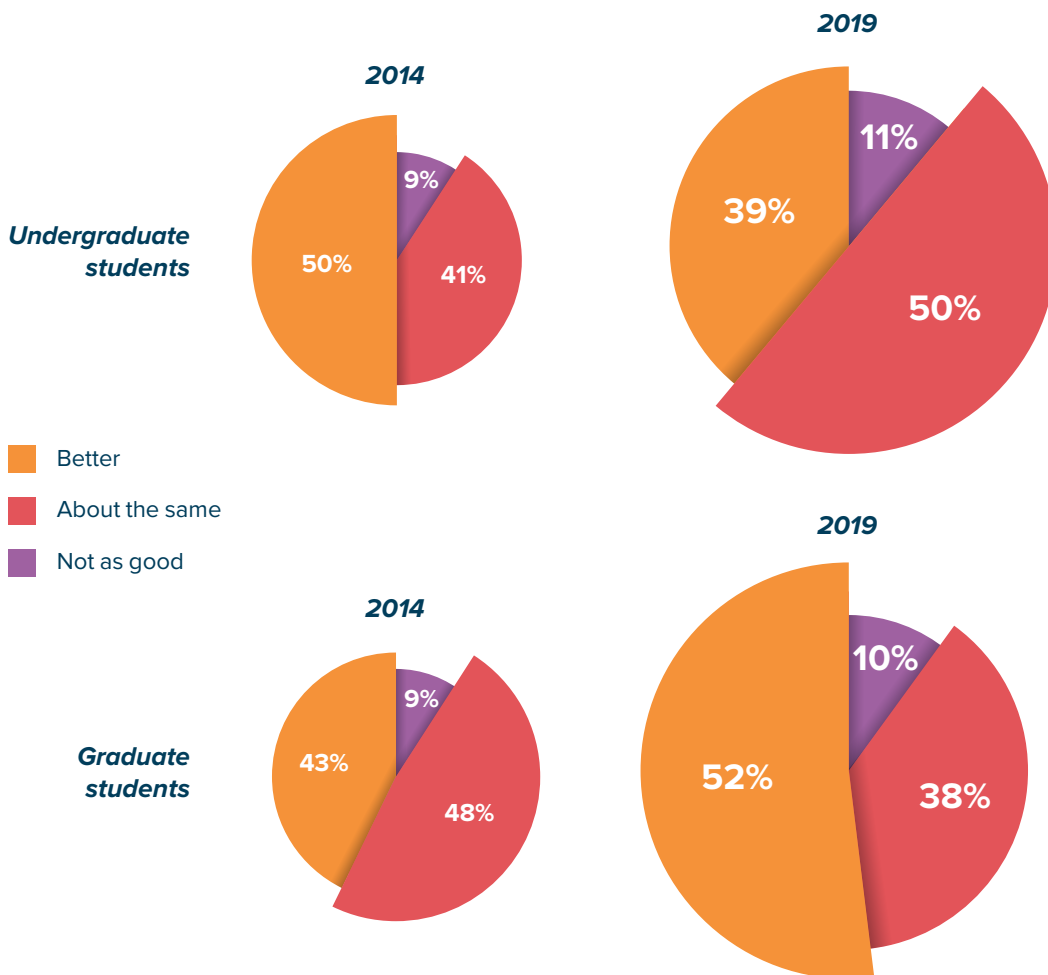
My online education was worth the cost. [Current and past students]



ONLINE VERSUS IN-PERSON INSTRUCTION

Online learning stacks up well against classroom instruction, per respondents who experienced both modalities at the college level. Most of those students said online instruction was better than or equal to face-to-face instruction. However, a trend at the undergraduate level indicates fewer students feel that online instruction is better than their previous face-to-face experience, as more indicated that instruction is about the same in both modalities. There is opposite movement at the graduate level, where a greater percentage of students now feel online instruction is superior to their face-to-face experience. The percentage of students who feel online education is inferior to their face-to-face experience remains statistically unchanged.

How would you compare the instruction of your college-level online learning experiences with your college-level classroom experiences? [Current and past students with both online and face-to-face course experience]



APPENDIX:

DEMOGRAPHICS

EVOLVING DEMOGRAPHICS

In the first *Online College Students* survey in 2012, 74% of undergraduates and 66% of graduate students were female. While that held fairly constant during the following six years, 2019 may signal a shift. This year's survey reveals an influx of male students at both levels of study, with a close to 50-50 split at the graduate level. While this may be a data anomaly, it may indicate that the online population is beginning to mirror the demographics of "traditional" higher education.

One recent trend is the population of online students is getting younger. In 2015, the average undergraduate student was 32.3 years old and the average graduate student was 35. Both averages fell by nearly two years in 2019, as the average undergraduate is 30.5 years old and the average graduate student is 33.7.

<i>What is your gender?</i>	All students	Undergraduate students	Graduate students
Male	40%	35%	46%
Female	60%	65%	54%
Prefer not to say	0%	0%	0%

Age	All students	Undergraduate students	Graduate students
18 to 24	32%	39%	23%
25 to 29	19%	18%	21%
30 to 34	14%	12%	16%
35 to 39	10%	10%	10%
40 to 44	8%	7%	10%
45 to 49	7%	6%	8%
50 to 54	4%	4%	5%
55 or older	6%	5%	7%
Average age	31.8	30.5	33.7

<i>What is your marital status?</i>	All students	Undergraduate students	Graduate students
Married/partnered	44%	38%	53%
Single	55%	61%	46%
Prefer not to say	1%	1%	1%

<i>How many children under the age of 18 do you have?</i>	All students	Undergraduate students	Graduate students
None	60%	63%	55%
One	20%	18%	22%
Two	15%	13%	16%
Three or more	6%	6%	7%
Prefer not to say	0%	0%	0%

EARNING A LIVING

Seventy-two percent of online college students at the undergraduate level work full or part time, which is also true of 70% of all college students (Powell, 2017). At the graduate level, 70% work full time and 14% work part time. The percentage of students working full time has increased in recent years, while the percentage of unemployed students has declined with U.S. employment trends.

<i>What is your annual household income?</i>	All students	Undergraduate students	Graduate students
Under \$25,000	17%	22%	10%
\$25,000-39,999	19%	21%	15%
\$40,000-54,999	14%	15%	13%
\$55,000-69,999	12%	12%	13%
\$70,000-84,999	11%	10%	13%
\$85,000-99,999	8%	6%	12%
\$100,000-114,999	5%	5%	6%
\$115,000-129,999	2%	1%	3%
\$130,000-149,999	4%	2%	3%
\$150,000 or more	5%	3%	7%
Prefer not to say	3%	3%	3%

<i>What is your employment status?</i>	All students	Undergraduate students	Graduate students
Employed full time	59%	51%	70%
Employed part time	18%	21%	14%
Not employed	20%	25%	13%
Retired	2%	1%	2%
Prefer not to say	2%	2%	1%

<i>What is your race or ethnicity?</i>	All students	Undergraduate students	Graduate students
African American	16%	18%	13%
Asian or Pacific Islander	8%	7%	9%
Hispanic	10%	9%	10%
Native American	1%	1%	1%
White	64%	63%	66%
From another background	2%	2%	1%
Prefer not to say	1%	0%	1%

<i>Are you the first in your family to attend college?</i>	All students	Undergraduate students	Graduate students
Yes	30%	29%	32%
No	69%	70%	67%
Prefer not to say	1%	1%	1%

METHODOLOGY

In early 2019, Learning House and Aslanian Market Research conducted surveys with 1,500 individuals nationwide. Respondents were ages 18 and older, had a minimum of a high school degree 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.

Although graduate students represent only 15% of the total college population, they account for 27.9% of the online population (National Center for Education Statistics, 2019). 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 organization drew the sample from its 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 from across the nation was invited to participate in an online survey. Custom email invitations were sent randomly across the U.S. to reflect the basic population distribution, targeting people 18 and older. Panelists were then allowed to participate in the study if they had participated in an online program of study within the past 36 months, were currently enrolled, or were planning to enroll in a fully online degree, certificate, or licensure program within the next 12 months.

Respondents hail from all 50 states. States that represent 51% of the nation's population (according to the 2012 U.S. Census) represent 52% 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 IPEDS data shows that, in 2017, 3.1 million higher education students were enrolled in courses that were exclusively delivered via distance education. In 2017, Eduventures estimated the size of the wholly or majority online program market for the fall of 2018 to be 3.9 million students. Based on these findings, a sample of 1,500 represents approximate sampling error of +/-2.6% at a 95% confidence level.

A similarly small margin of error was achieved in each annual survey conducted from 2012 to 2018; therefore, differences between these survey results over six 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.

TECHNICAL NOTES

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

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