



2022

MARKET INSIGHTS BY WILEY

# VOICE OF THE ONLINE LEARNER

Shifting Preferences in Post-Pandemic Online Learning

**WILEY** University Services



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Shifting Preferences in Post-Pandemic  
Online Learning

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## INTRODUCTION

This is our 11th year surveying online learners' preferences, behaviors, and ways of selecting programs. Since we began this report over a decade ago, online learning has evolved substantially. But the most significant shifts have occurred over the last two years since the COVID-19 pandemic began.

Last year, we reported on an emerging group of online learners who had never considered a fully remote program before the pandemic. These ***pandemic-driven online learners*** have persisted in the 2022 survey, but questions about their longevity in online learning remain.

For instance, **will they eventually return to on-campus programs?** At the same time, inquiry into ***traditional online learners*** carries on. **How can we also continue serving them as their needs evolve?** We aim to address these different learners' varying needs and concerns in this report.

# Trends, Results, and Actionable Insights

The presence of pandemic-driven online learners is an interesting shift in the landscape of online higher education. At the same time, this shift remains uncertain for two reasons. First, they aren't inherently committed to the online learning modality like traditional online learners, and their future preferences remain unclear. Second, they haven't grown the overall population of online learners. While pandemic-driven online learners represented 33% of all learners surveyed this year, the population of traditional online learners has dwindled. In spring 2022, learners over the age of 24 across all modalities of higher ed **dropped by 5.8%**.<sup>1</sup>

## Spring 2022 Nationwide Enrollment

Learners over 24 (all sectors)

# -5.8%

This decrease in traditional online learners follows overall higher education enrollments, which have continued to slump—irrespective of modality—since our last report. Spring 2022 **enrollments fell 4.1%** compared to spring 2021, marking the fifth straight semester of declines.<sup>2</sup> As a result, higher education institutions have attempted to counter this market-wide enrollment downturn with tuition discounts, now at an **all-time high of 54.5%**.

Taking these trends into account alongside our survey results, we've provided:

- **key findings** summarized at the beginning of the report, with deeper analysis of topics such as cost and admission process throughout the body of the report
- **actionable recommendations** targeted to specific online learner groups within each section of the report
- **a checklist of key actions** to take at the end of the report

With these insights, you may take steps that help retain your current learners, expand to new students, and find measured ways to serve differing student populations as their preferences continue to emerge.



<sup>1</sup> Spring 2022 enrollment declines as reported by the National Student Clearinghouse Research Center on May 26, 2022. <https://nscresearchcenter.org/current-term-enrollment-estimates/>

<sup>2</sup> Ibid.

<sup>3</sup> From NACUBO, as reported on May 19, 2022. <https://www.nacubo.org/Press-Releases/2022/Tuition-Discount-Rates-at-Private-Colleges-and-Universities-Hit-All-Time-Highs>

## About the 11th Edition

In the spring of 2022, we surveyed 2,500 prospective, current, and recently graduated online learners to understand:

- how they chose to study online
- what they were seeking in a program
- what they wanted to accomplish upon graduation
- how they viewed and utilized scholarships, tuition discounts, and employer benefits

With over a decade's experience developing this survey instrument, this year's report features a mix of brand-new and recurring questions and topics. As such, you'll find some questions have

historical trend data, while others are fresh to this year and are often informed by the unique and growing population of pandemic-driven learners. To learn more about our approach, read the [Methodology](#) section at the end of the report.

To learn more about what influences online learners' success and satisfaction in the learning environment, please see our companion report, [Online Learner Experiences 2022](#).

We hope the data and recommendations in this 11th edition help you successfully navigate the ever-evolving online learning marketplace.

## Pandemic-Driven vs. Traditional: Two Types of Online Learners

This year, we've identified a distinct group of online learners with different perspectives and traits than those we've been tracking for the past decade. Throughout the report, we differentiate these groups as **pandemic-driven** and **traditional online learners**. Here are some key differences between them:

### Pandemic-Driven Online Learners

- Learns online initially due to pandemic-related restrictions
- Skews under 25
- More likely to prefer in-person instruction
- Open to synchronous sessions, whether in-person or online
- More likely to switch to an on-campus program in the future

### Traditional Online Learners

- Learns online due to inherent preference
- Skews over 25
- Prioritizes the flexibility of online learning
- Somewhat open to occasional synchronous sessions
- Less likely to transfer to an on-campus program for any reason



# #1

Online learners' loyalty to the modality endures—but the pandemic-driven bubble may still burst



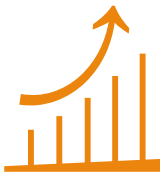
The **traditional online learner** remains fundamentally aligned with the online modality. However, the new **pandemic-driven online student** is not. Similar to our 2021 results, this year's survey found that one in three respondents hadn't considered a fully online program before the pandemic. Of these new, pandemic-driven learners, one-third said they were likely or very likely to change to a campus-based program in the future. **This group skews under 25 and is less motivated by online learning's flexibility, such as not having required on-campus class times.**

While pandemic-driven online learners may persist, some may migrate to on-campus learning from their online programs as they begin to feel more comfortable with in-person instruction. Taking a proactive approach to understanding their needs will be essential, whether keeping them engaged in their current online programs or helping them transition to on-campus options at your college or university.



# #2

## Online students' views of remote education are at an all-time high post-pandemic



Although the media reported on students who filed lawsuits regarding early pandemic emergency remote learning, the students we surveyed show an increasingly positive view of traditional online instruction. Eighty-six percent had a positive or very positive view of the modality before the pandemic; currently, **94% have a positive or very positive view.**

Among current and recently graduated online learners, 87% reported achieving an outcome they can attribute to their degree, such as obtaining a salary increase or more marketable skills. Additionally, at least 80% felt their degree is important to achieving their goals and that a college degree can lead people to better jobs. When asked if they'd learn online again, 83% said they would.

The pandemic created a demand for emergency remote synchronous learning and a new group of online learners. Seventy-nine percent of survey respondents said they'd be willing to log in at a specific time at least once per course for a required discussion or virtual lecture. Additionally, 55% reported a willingness to visit campus at least once per term for an in-person session.

This new openness is noteworthy because not having to go to campus is why most online learners (59%) opt for remote education. Moreover, most online students reported they prefer an asynchronous (69%) and fully online program with no required campus visits (79%). So, **while asynchronous, online learning is still the preferred format, opportunities for high-impact synchronous virtual lessons and on-campus sessions are emerging.**

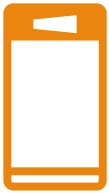
# #3

## Today's online learners are now more open to occasional, synchronous sessions



# #4

## Digital marketing is most memorable to online learners



We found that **online learners are more likely to remember digital marketing** (e.g., email, Google, social media, and college-focused websites) than non-digital marketing (e.g., TV commercials and direct mail). Online learners also remarked that digital ads more effectively raise their awareness about online programs than non-digital ads.

Note that online students are less likely to use some of these same digital sources—social media, third-party college search, and college-focused websites—once they identify a school and seek detailed information. From that point, the college’s website becomes the primary source of information.

Program tuition and fees are very or extremely important to 74% of online learners and, for the past decade, have been top-ranking factors in their program decision-making process. **Despite the demand for affordability, many students with employer-sponsored tuition benefits still don’t use them.** Nearly 50% of online learners with these benefits reported they won’t—or aren’t planning to—use employer-paid tuition assistance.

So, why aren’t learners using these benefits? They cite two main concerns. First, they feel that their **employer benefits don’t cover enough tuition**. Second, **they worry about having to pay back their employer** if they leave the company before finishing their program. Compare this to our finding that nearly one-third of online learners would choose one program over another for an annual scholarship of as little as \$500. As such, many employers need to reexamine their education benefits and reduce the hurdles that prevent employees from using them.

# #5

## Affordability remains a top concern, but employer benefits may be too restrictive to help online learners



## Questions About Learners in 2022, Answered



### How loyal to online learning are today's students?

More loyal than ever. Despite the differing preferences of pandemic-driven online learners compared to traditional online learners, more students overall reported a fundamental preference for online learning. Seventy-seven percent said the online modality was the most important factor in their decision-making process this year.



### How have views regarding lab courses shifted post-pandemic?

While most learners with labs (51%) still report a preference for in-person, on-campus labs, many prefer remote options. Thirty-one percent of all students with required labs now prefer online simulations, and 20% are now in favor of a mail-order kit.



### Has the pandemic affected learners' location preferences?

While the pandemic may have made learners temporarily open to schools slightly farther away, online learning remains localized, and the majority of students still prefer a university less than 50 miles from where they live. In addition, fewer learners today are open to a university more than 50 miles away from home compared to 2012.



### Are learners interested in the same alternative credentials that employers value?

Yes and no. Both learners and employers rank trade skills certificates and industry certifications as their top two choices for degree alternatives, respectively. However, employers put more value on them than learners. Fewer students were generally open to alternative credentials compared to employers.



### Has inflation impacted the value of scholarships?

It appears so. Scholarships are still critical factors in students' decision-making process, but smaller scholarships are less likely to influence their decisions. For example, a scholarship of \$500 or less would have influenced 42% of learners in 2017, but it would now only sway 31% of learners in 2022.

For guidance on implementing these findings, visit this report's final section, **Next Steps: How To Grow and Support Online Learners.**



# WHAT LEARNERS THINK AND VALUE ABOUT ONLINE LEARNING

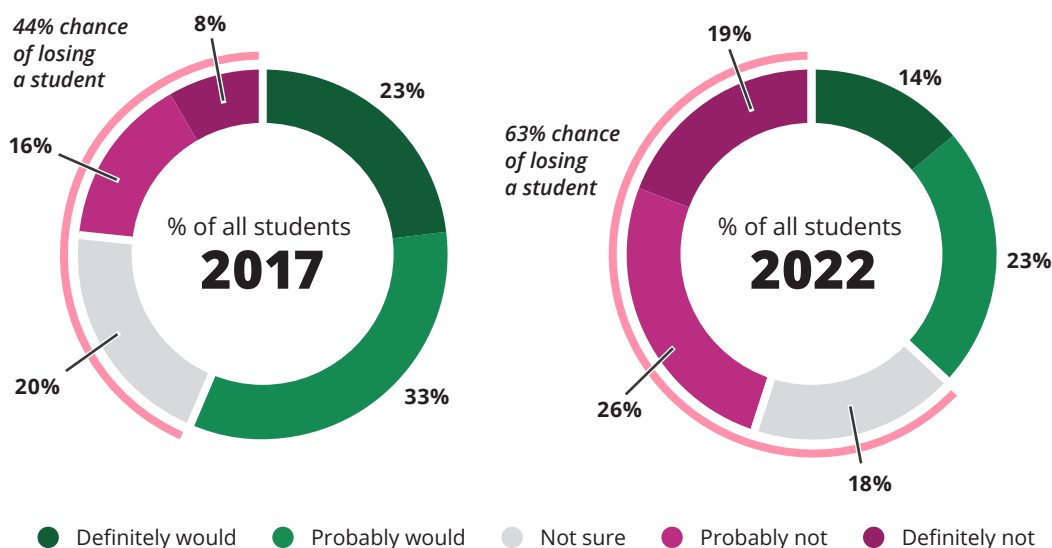
## Learners Prioritize the Online Modality More Than Ever

When first adding online programs to their portfolio, colleges and universities are sometimes concerned that on-campus programs will compete for the same students. However, this is generally not the case. Even with the new group of pandemic-driven online learners less aligned with remote education, students prioritize learning online more than ever. This year, **77% of learners reported they decided on the online modality before any other factor**, such as school or program.

To understand this preference better, we also asked learners how likely they'd be to attend an on-campus program if their preferred program wasn't available online. This year, only 37% of learners said they'd enroll in a campus-based program, down from 56% five years ago.

*77% choose modality before other factors*

**If the program you wanted was not available in an online format, how likely is it that you would have enrolled in an on-campus program?**



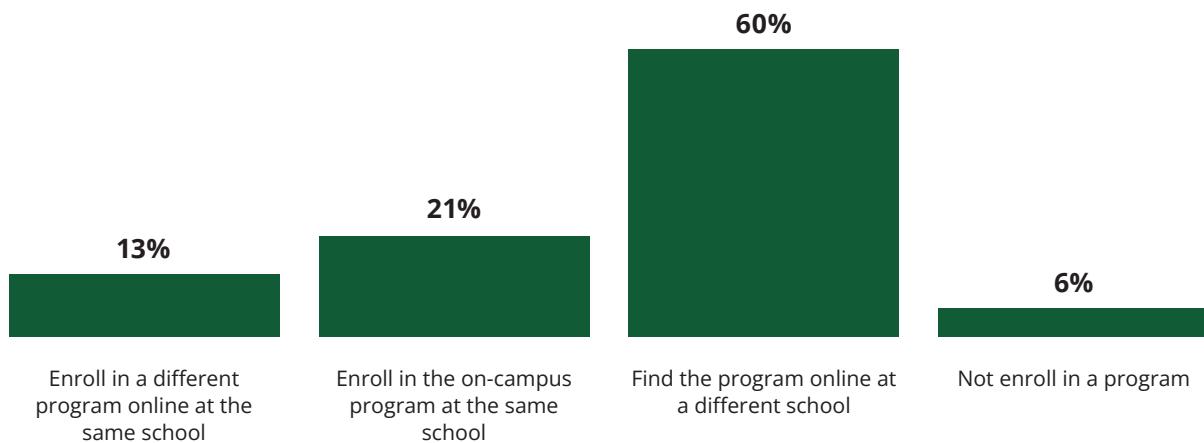


**While most online learners prioritize modality, fewer prioritize their specific college or university.** Sixty percent said they'd choose the equivalent program at a different school if their preferred college or university didn't offer their program online. These results indicate that **having the right programs online is more likely to secure enrollments than create competition with the same school's on-campus programs.**

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

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## Some Pandemic-Driven Online Learners Want to Return to Campus

About one in three (35%) prospective online students hadn't considered learning online before the pandemic. Of this group, most (48%) aren't likely to change to a campus-based program in the future. Just over one-third are likely to transfer to campus, with 14% remaining unsure about their transfer status.

# The Pandemic Improved Views of Online Learning

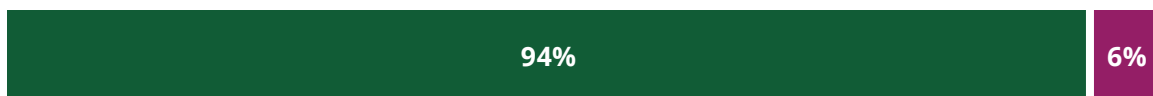
Overall, the pandemic has improved students' view of remote education. Where 86% of respondents had a positive view of online learning before the pandemic, **94% have a positive view now**. By contrast, negative views fell from 14% pre-pandemic to just 6% currently.

## How did/do you view online learning?

### Prior to the pandemic



### Currently



● Positive opinion    ● Negative opinion



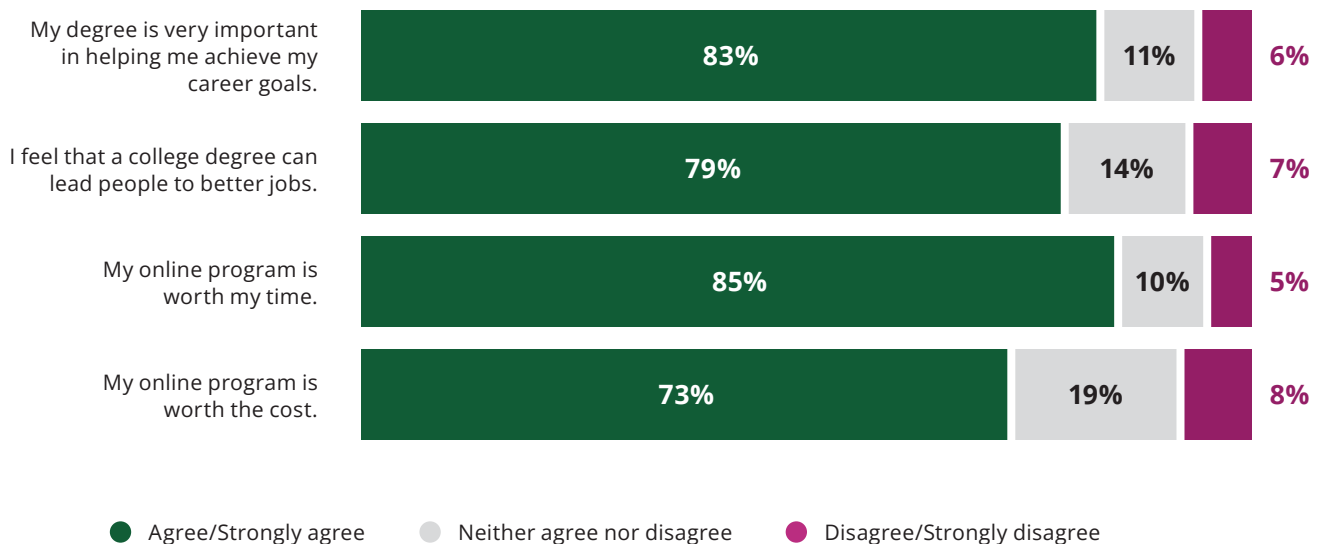


## Online Learners Highly Value College Education

Today's widespread enrollment declines have indicated that learners are questioning the overall value of higher education. Despite this broad trend, the online learners we surveyed indicated that they highly value a college education. Eighty-three percent agreed that their degree will be very important in helping them achieve their career goals (only 6% disagree). A similar proportion (79%) agreed that a college degree can lead people to better jobs (7% disagree). A similar proportion (79%) agreed that a college degree can lead people to better jobs (7% disagree).

Online learners also highly value the programs in which they're enrolled. When asked about their program, **85% agree that their online degree program is worth their time**, versus 5% who disagree. Furthermore, 73% believe it's worth the cost, compared to 8% that disagree.

### How strongly do you agree or disagree with the following statements?



# Learners See Pros and Cons to Online Learning

Online learners continue to gravitate towards the modality's flexibility. The top reasons reported this year include not being required to go to campus (59%), completing coursework when they want to (58%), and having no set class meeting time (54%).

Despite these positives, some have concerns about online learning, which you can find out more about in our companion report, [Online Learner Experiences 2022](#). There, you'll read about learners' concerns regarding faculty expectations and interactions, building relationships with classmates, and recommendations for improving the online classroom.



## DIVE DEEPER

### Which Learners Would Return to Campus?

More than two years into the pandemic, a significant group of pandemic-driven learners have persisted online. These learners weren't considering an online program pre-pandemic, skew younger than the traditional online learner, and would more likely enroll in an on-campus program if the online equivalent weren't available. Location also more likely influenced their enrollment decisions because visiting the physical campus is important to their learning experience.

Besides their differences in age and location preferences, they're also more likely to learn about online programs via email. This may indicate a more passive search process than the traditional online learner who tends to search Google or college sites for information.

When asked about their concerns regarding learning online, students who want to return to campus are more likely to cite the quality of instruction and lack of interaction with classmates.

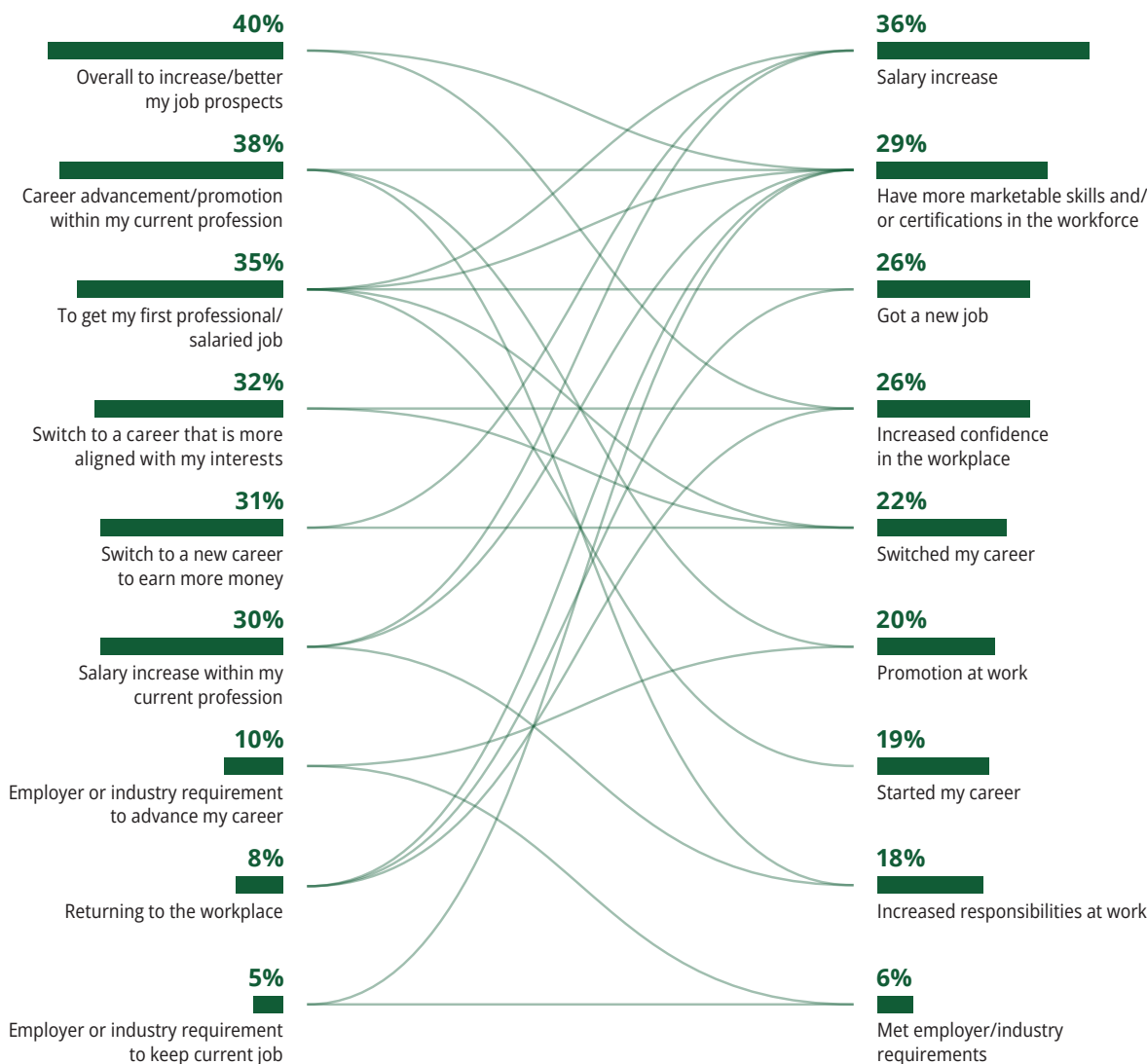


# Career Outcomes Motivate Online Learning

Overall, online learners are motivated by career outcomes. Their top motivations for pursuing their degree are to improve their job prospects (40%), advance their careers (38%), and start their careers (35%). Career switching is the next largest motivation, such as switching to a career that aligns with their interests (32%) and switching to earn more money (31%). Just behind these is a general motivation to increase their salary within their current profession (30%). As illustrated below, a single factor influencing a student's decision to pursue degrees can lead to multiple positive outcomes.

**Which of the following factors influenced your decision to pursue a degree?**

**Which of the following occurred during your program and can be attributed to your receiving this degree?**



Online learners are not only motivated by specific career goals, they're also likely to achieve outcomes aligned with their motivations. **Nearly 90% of current online learners and recent alumni reported an outcome they can attribute to their program.** In addition, 36% of learners reported a salary increase, and many reported getting new roles. Twenty-six percent got a new job, 22% switched careers, 20% were promoted, 19% started their careers, and 18% now have more responsibilities at work.



#### RECOMMENDATION

### Prioritize Modality- and Values-Focused Messaging

Despite the concern that different learning modalities create internal enrollment competition, our data doesn't support this concept. How so? We've found that most remote learners prioritize the online modality, while those interested in returning to campus only considered remote learning because of the pandemic.

That's why **program messaging should appeal directly to traditional online learners** when it comes to marketing programs. Students looking for remote programs are unlikely to consider on-campus options, so **marketing should explicitly communicate the online modality.** It should also align with learners' strong belief that a college degree can improve their lives and help them achieve their career goals.

Support staff can also align with learners' values and beliefs about earning a college degree. When advisors are proactive and remind learners why they began their degree, they can help students stay motivated, provide the interpersonal connection learners may demand from their online programs, and help students persist through to graduation.

## SECTION 2

# HOW ONLINE LEARNING PREFERENCES HAVE SHIFTED

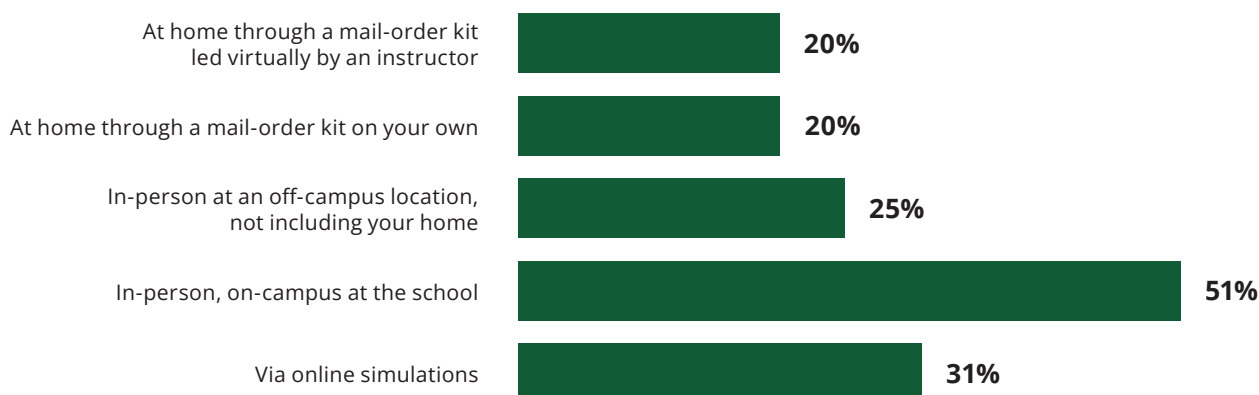
## New Ways to Learn: Remote Labs and Mobile Devices

When we asked online learners whether they expect to take part in courses with labs, 18% confirmed they anticipate lab work in their program. These courses are typically associated with nursing, health, and now engineering programs, although engineering wasn't considered easily delivered online before the pandemic.

**Of the 18% that anticipated laboratory courses, most prospective learners (58%) said they'd prefer to take those courses in-person and on-campus at their college or university.** Beyond this majority preference, 26% of prospective learners would like to complete online simulations, and about one-fifth would prefer to take lab courses through a mail-order kit.

Prospective students' lab preferences align with current and recent graduates' actual experiences. Despite the pandemic, nearly half of current and recent online students were able to take their labs in-person on campus, closely matching prospective online learners' preferences.

### % of learners who report required laboratory courses as part of their online program (N=451)



**The use of a mobile device**—defined as a smartphone or tablet and not a laptop—**has also been growing amongst online learners.** In this year’s study, we asked students what percentage of their coursework they’d like to complete on a mobile device. On average, online learners would prefer to complete nearly half of their coursework on a smartphone or tablet, with 43% of coursework performed on a mobile device for currently enrolled and recently graduated students and 49% for prospective students.

## Flexible Formats Still Preferred, Synchronous Learning Trending

Not every online student wants the same type of program format, but there are formats most students prefer. For example, we found that **69% of online learners want a program with a fast completion time**, including back-to-back courses and few breaks between courses. This aligns with our findings about learners’ preferences for multiple start dates. Eighty-eight percent want multiple dates so they can begin their program sooner, compared to 12% who prefer fewer start dates so they can have a larger class size.

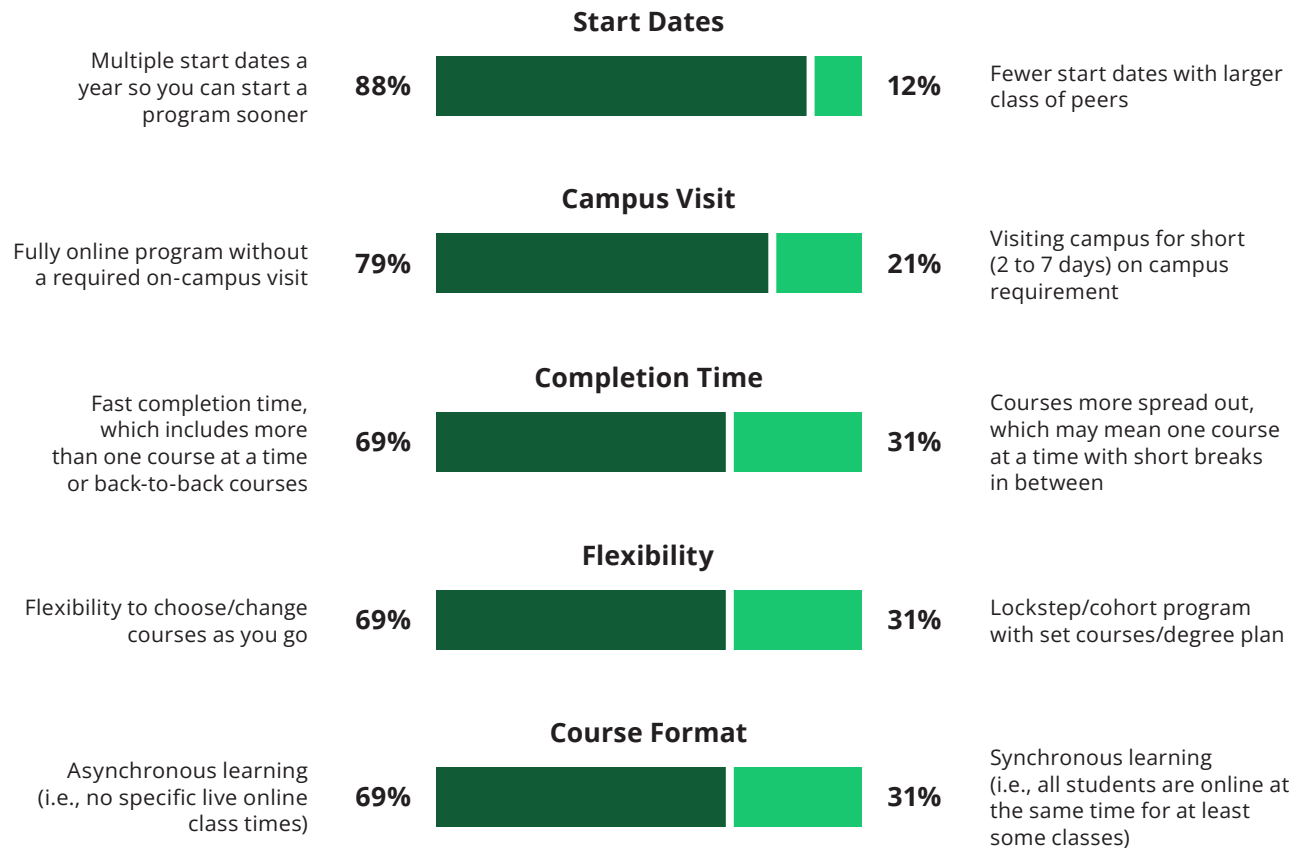
We also found that online learners prefer to learn on their own schedule as more than two-thirds (69%) of respondents prefer learning in an asynchronous format. Sixty-nine percent also favor the flexibility of working through courses at their own pace rather than having a lockstep cohort program with a set degree plan. This preference for flexibility also translates to on-campus requirements, as eight in ten (79%) learners reported wanting a fully remote experience without having to go on-campus.





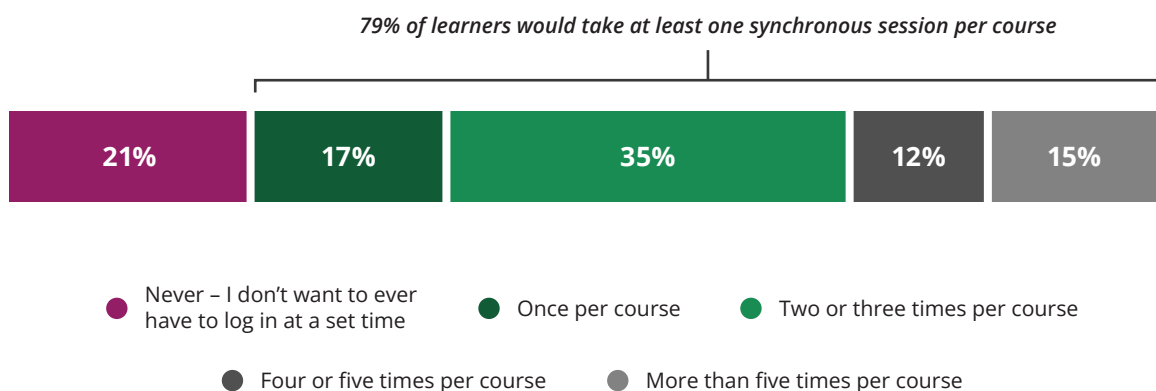


**When thinking about the format of a program, which options do you prefer from the following listed below?**

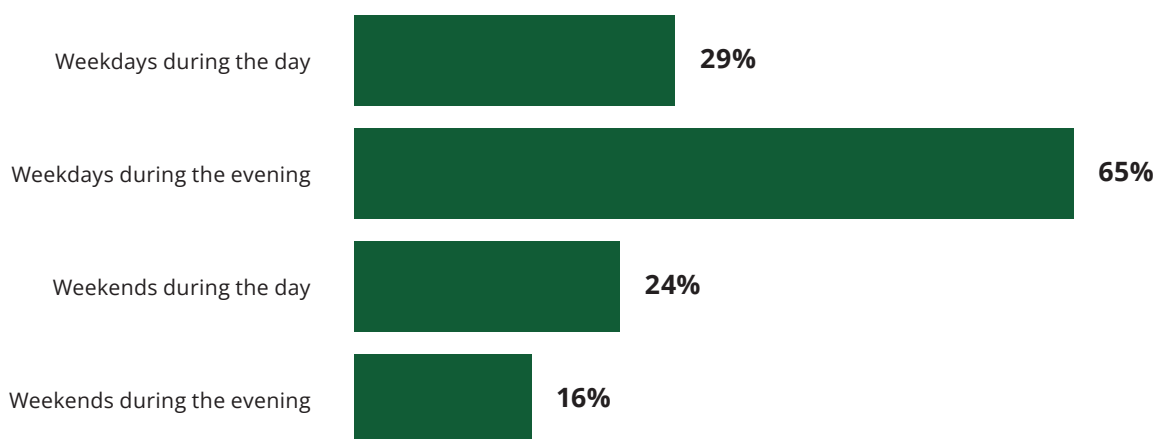


Although most online learners prefer asynchronous class formats, synchronous sessions are not out of the question. As of this year, **79% of respondents reported they're open to some form of synchronous online learning**. Fifty-two percent of remote students would be receptive if the synchronous requirement were one to three times per course. Of learners who were open to synchronous sessions, 65% said they'd prefer evening sessions during the week.

**How often would you be willing to log in at a specific time to join a required discussion or virtual lecture with your instructor and classmates for each class that you attend?**



**Would you want these synchronous sessions to be:**





## RECOMMENDATION

### Uncover Learners' Specific Flexibility Preferences

The online learner has evolved over the last 11 years we've conducted this survey. Students' interests and the programs available have diversified, and online learners' increased willingness to consider synchronous sessions is new to this year.

So, how should you respond? For those with existing programs, start by **discovering how much flexibility your learners want** while keeping in mind that a one-size-fits-all approach won't work for everyone. As we've found, some groups of learners may be more open to participating in synchronous sessions or a lockstep cohort than others. Once you survey your students, you can develop courses and support services tailored to their exact needs.

For those just entering the market, start by designing flexible programs with no required synchronous sessions and **eight-week terms** to align with online learners' overall preference for flexibility. Then, as cohorts of students move through their first courses, you can survey them for their preferences and make any necessary adjustments.

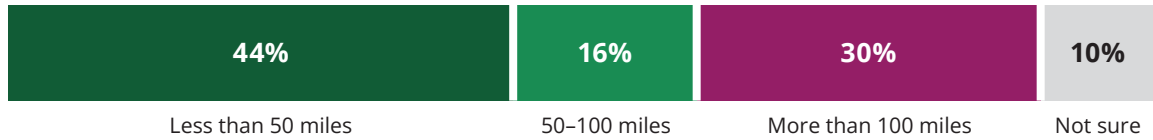
## Location Preferences: Campus Within Driving Distance

Online learning remains local, though the pandemic may have widened what was once a tightening radius. And even as the pandemic has subsided, **online learners still prefer a campus within a reasonable driving distance** as they have for the past decade. In 2022, for instance, 48% of online learners sought a school within 50 miles of where they lived, slightly up from 44% of learners in 2012.

While the majority preference has remained, one thing has changed over the past 11 years: the preferred radius overall. In 2012, 30% sought a school more than 100 miles from their location, but in 2022, this group decreased to 24%. Similarly, learners seeking a school between 50 to 100 miles have decreased from 16% in 2012 to 12% in 2022.

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

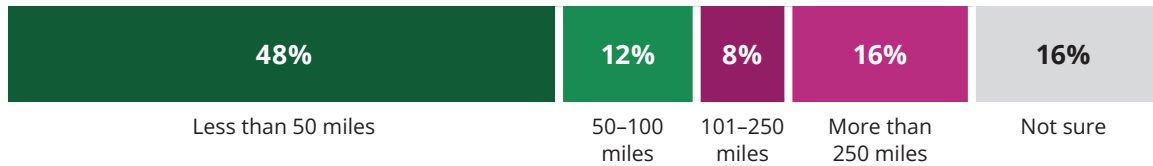
2012



2017



2022



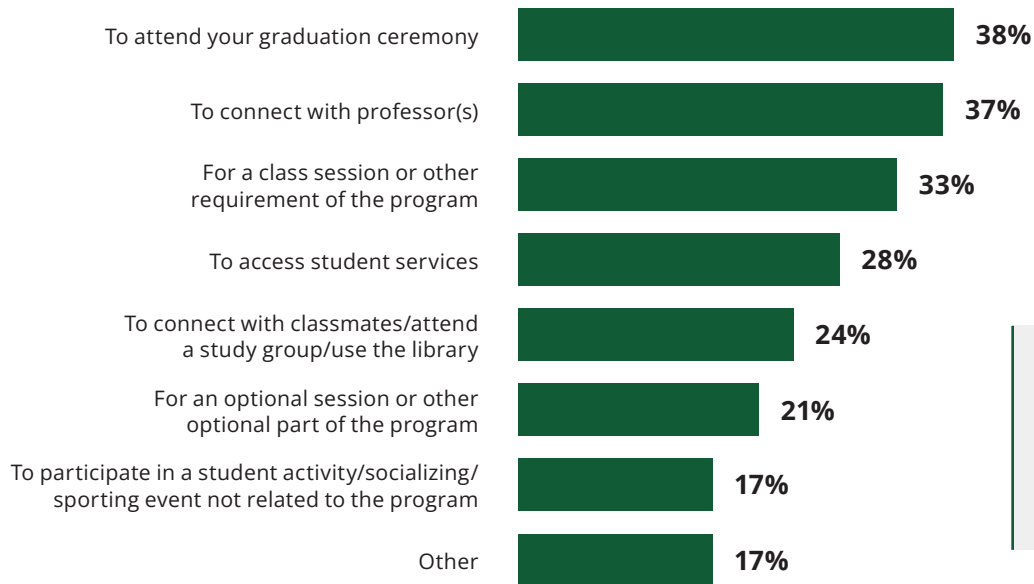
So, why has the radius shrunk?

**As students' online learning options have increased, they're more likely to be familiar with and consider local colleges and universities.** And whether or not learners visit their campus, many want the option. More than one-third (34%) of surveyed online learners noted that being close to the physical campus is important to very important to them. Of those learners, their reasons for visiting campus include attending their graduation ceremony (38%), connecting with an instructor (37%), and attending a required, on-campus class session (33%). By contrast, 24% said being physically close to their campus wasn't at all important to them.





## Why might you visit campus? (N=1,878)



*34% say it's important to visit campus*





While a physical campus is important to many students, a sizeable group prefers entirely remote learning. For instance, 45% of online students wouldn't be open to visiting campus for an in-person session. Meanwhile, nearly a quarter would be open to going to campus at least once per term. The most popular time for an in-person session was weekday evenings, with nearly half (45%) of learners open to on-campus sessions preferring this option.



#### DIVE DEEPER

## Who's Open to Synchronous Learning?

Synchronous learning is on the rise due to the pandemic. It brought an influx of younger students to online education for whom synchronous, emergency remote learning became ubiquitous. These learners were also less likely to have considered a fully online program before the pandemic. Therefore, they're also more likely to value visiting campus than students who aren't open to synchronous learning.

Besides this, online learners' openness to synchronous sessions appears evenly spread throughout the population. There are no stark differences across age, degree level, employment status, or field of study. Although learners may be open to at least one synchronous session per term, they still generally prefer asynchronous learning.



#### RECOMMENDATION

## Limit On-Campus Components to Essential Activities

Online learners have been and continue to be local. **While most learners would visit campus if explicitly required, they generally aren't looking for programs with required, on-campus components.** And although they may be open to some synchronous learning, most online students seem resistant to regular on-campus components. That's why we recommend reserving campus-based components for courses where in-person learning has a high impact. At the same time, it's important to continue providing equitable options, such as recorded lessons, so that students who face barriers to attending in-person sessions are included.

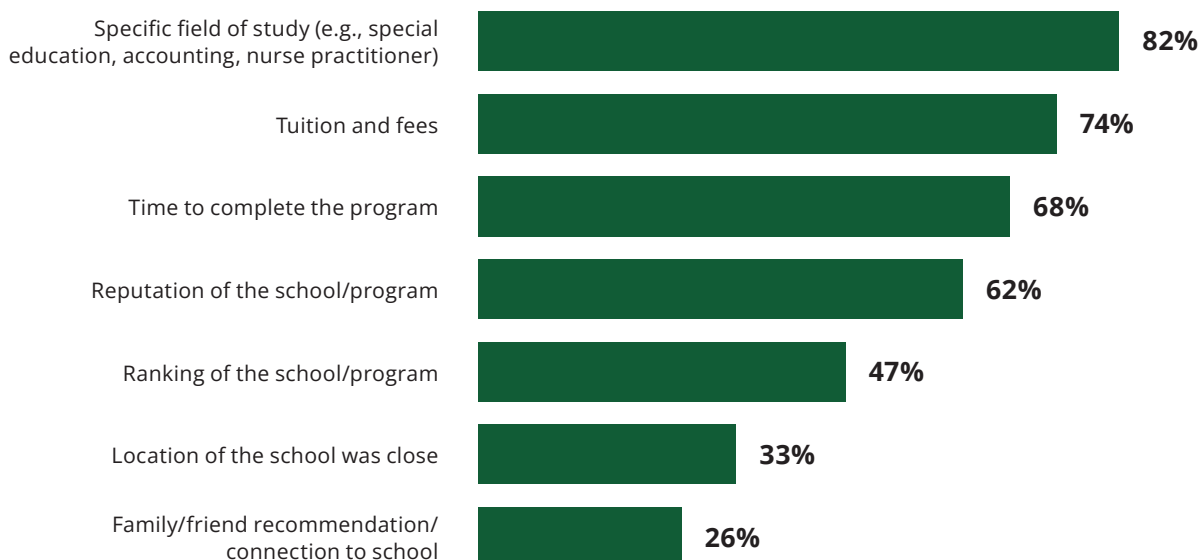
# HOW ONLINE LEARNERS CHOOSE PROGRAMS

## Inspired by Program, Convinced by Cost

While modality is the top reason learners choose online programs, we wanted to understand what factors lead them to consider and apply to specific programs. When we asked about distinct factors influencing them to first look at a program, learners reported that the particular field of study was the most important (82%), followed by tuition and fees (74%), and time to complete the program (68%). However, when it came to finally apply to a program, their top motivations came down to affordability (59%), followed by time to completion (33%) and accreditation (32%).

As a result, colleges and universities must first offer learners' preferred programs but ultimately provide a competitive cost and speed to a degree. These findings align with learners' reasons for not applying to a program, with tuition and fees topping the list (42%), followed distantly by on-campus requirements (24%).

### How important are the following factors that first led you to look at a program?



## Digital Marketing is Most Memorable and Effective

Seventy percent of remote learners recalled seeing online program information or ads in specific marketing. Overall, learners recalled digital marketing mediums most, with the highest recall from email marketing (28%), followed by listings on Google (26%), ads on social media sites like Facebook (22%), and ads on college search sites (21%). Non-digital mediums were recalled less often, with TV commercials and direct mail remembered by fewer than 15% of the surveyed online learners.

**Online learners' non-digital marketing recall has trended downward in recent years.** In 2017, 29% of learners recalled TV commercials, and 18% remembered direct mail ads about online programs. However, in 2022, only 14% and 10% of learners remembered these non-digital mediums, respectively. The most likely reason for this trend? The expense of non-digital marketing. Based on our higher education marketing expertise, it is used and thus viewed less in 2022 than in 2017 because it costs more than digital forms.

Learners reported that digital marketing was more effective than non-digital methods, although this gap was less severe. Respondents that remembered the advertisement felt that listings on Google were the most effective (78%), followed by email (70%), ads on college search sites (70%), and ads on Facebook (69%). Behind these digital mediums were TV commercials, with 67% of learners reporting they were effective or very effective at making them aware of potential online programs. Direct mail was the least favored, with 61% of learners calling it effective or very effective.



**How effective were each of the following methods in making you aware of potential online programs?**

	<b>% Remembered advertisement</b>	<b>% Found it effective/very effective ▾</b>
Listings on Google	26%	78%
Email	28%	70%
Ads on college search sites	21%	70%
Ads on Facebook or other social media sites	22%	69%
Commercials on TV	14%	67%
Direct mail	10%	61%

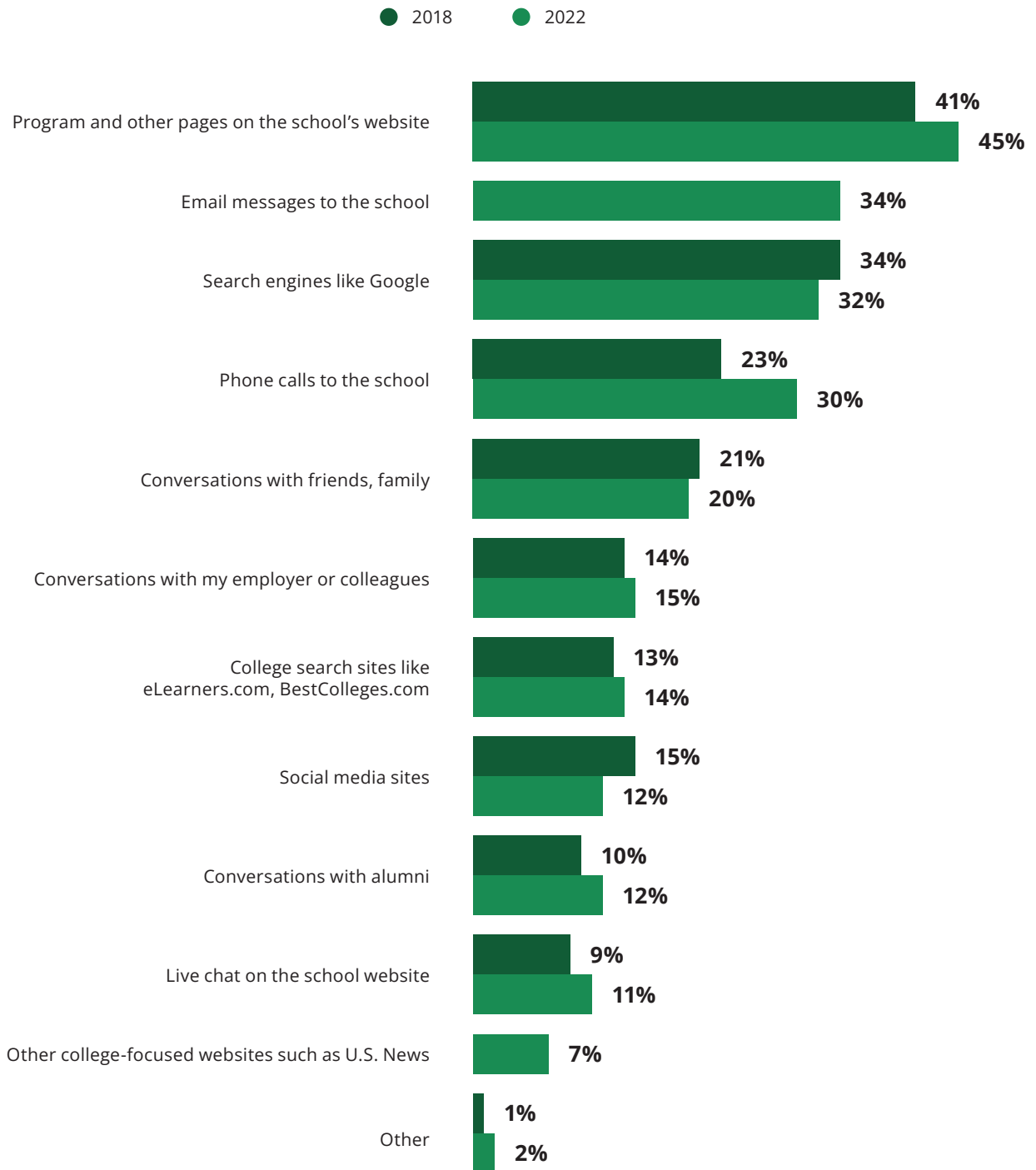


## Primary Information Source: The College Website

Once learners identify a school of interest, 45% primarily use the higher ed institution’s website to gain detailed program information. While they search the website independently, only 11% expect to utilize live-chat functionality, if available. Additionally, just over one-third (34%) email the school, and one-third (32%) turn to Google for information.

Although 30% of learners will pick up the phone and call the school, they aren’t as likely to have conversations with others to gather detailed program information, as fewer than one in five online learners will talk with their employer or co-workers (15%) or alumni (12%). In addition, third-party sites, such as college search sites (14%), social media sites (12%), and other college-focused websites (7%), are also less used to source detailed information. Consistent with 2018, this year’s findings revealed no significant change in students’ preferred primary sources of information.

**After identifying school of interest, what will be your primary sources of detailed information about your intended programs?**







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## RECOMMENDATION

# Optimize Digital Search for Learners and Machines

Digital mediums resonate with online learners most, so optimizing the searchability of essential program information is crucial to both prospective students and the machine algorithms that guide them.

Regarding the program search phase, this includes developing **comprehensive search engine optimization (SEO) and affiliate marketing strategies**, streamlining your website's layout, and highlighting key program information front and center on the first page. This lets machine algorithms easily pull key information for the search engines and directory sites that lead learners to your site.

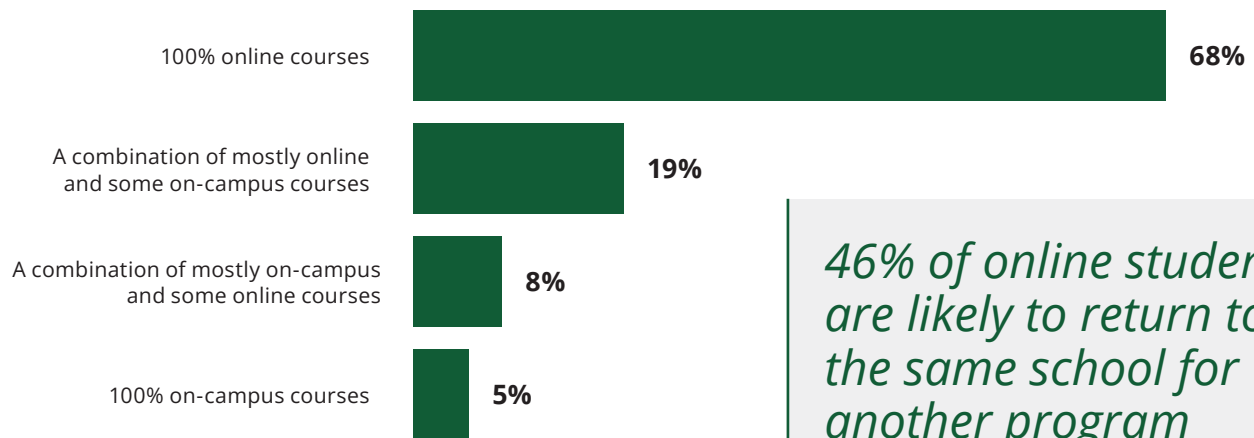
These measures also improve learners' experience since they need to navigate your website easily and quickly access necessary program information. For instance, we've found that the best sites show the length of time to complete high on the first page. In addition, collecting learners' email addresses through a form can help with outreach, but learners need to make informed decisions whether they fill out a form. That's why **a streamlined website with transparent and targeted program information is critical.**

Special Note from Our Researchers: Learners' preferences for digital marketing haven't changed in the past five years. In fact, we were very surprised by how similarly they've responded in the past two years.

# They Aim to Be Engaged Alumni

Learners graduating from online programs generally want a continued relationship with their alma mater. **Nearly half (46%) of online learners say they're very likely or likely to go back to the same school for another program.** Of those learners, 68% would want that program to be entirely online, with 27% preferring a hybrid experience. Among learners still completing their online degree who would return to the same school, 26% would enroll in another program, 25% would take classes, and 43% would refer another student. These results again underscore learners' fundamental alignment with the online modality.

How would you like to complete the courses for that program? (N=1,125)



*46% of online students are likely to return to the same school for another program*



# Most Online Learners Are Open to Degree Alternatives

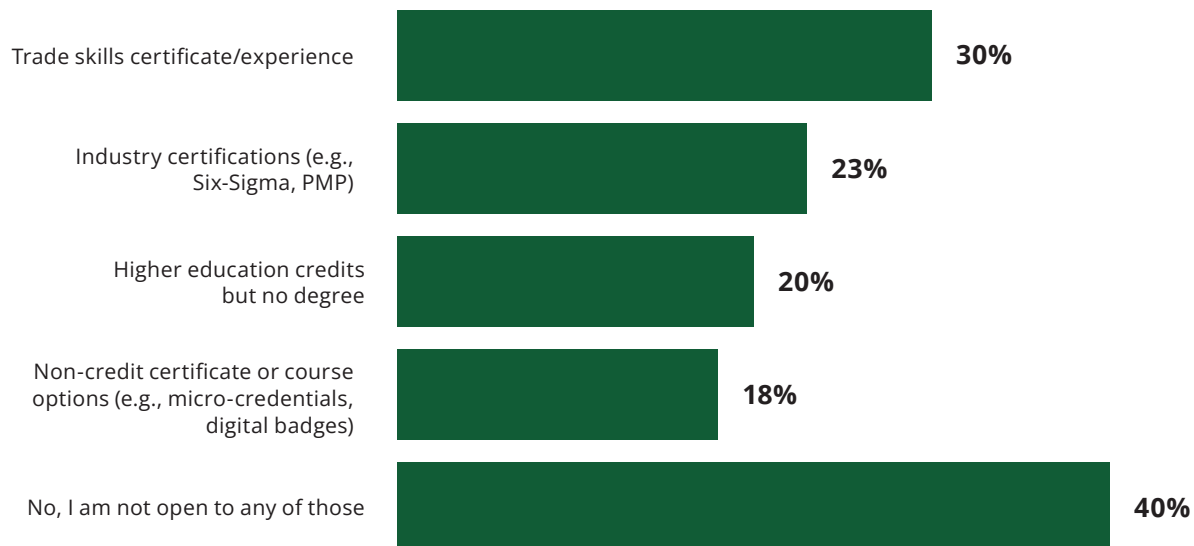
**Sixty percent of online students surveyed said they're open to pursuing a non-traditional credential instead of a college degree.** A trade skills certificate or experience (30%) was the most popular alternative for these learners, followed by an industry certification, such as Six Sigma (23%). Non-credit certificates or course options, such as micro-credentials and digital badges, were of interest to 18% of online learners.

**Interestingly, employers appear to value different non-degree credentials.** In our report, [Reimagining the Workforce 2021](#), human resources leaders still felt a college degree is the top educational credential for evaluating new hires (72%). But they also said that trade skills certificates (68%), industry certifications (60%), and digital badges and micro-credentials (50%) were important.

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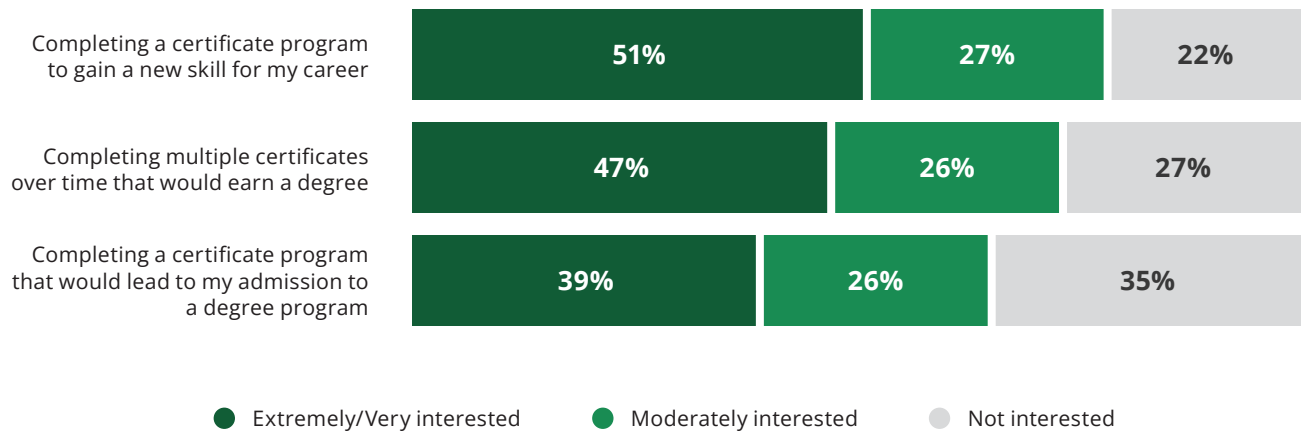
## Are you open to pursuing any of the following non-traditional degree alternatives in place of a college degree?

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When asked about ‘stackable certificates,’ learners were very or extremely interested in pursuing such credentials to gain new skills for their career (51%) or earning certificates to build towards a degree (47%). Slightly fewer were very or extremely interested in completing a certificate to gain admission to a degree program (39%).

**How interested would you be in the following certificate options if they were available in your subject area of interest?**



**DIVE DEEPER**

**Understanding Boomerang Learners**

Learners who indicated a likelihood of returning for another online program are more likely to gravitate towards asynchronous learning. They also tend to share similar traits: They’re more likely to be under 30 and prefer programs with accelerated completion times.

Surprisingly, these learners are also likely to seek a traditional degree program rather than a degree alternative. They showed less interest in stackable certificate options, such as taking a certificate program to gain admission to a program or completing certificates that would ladder up into a degree. These learners were also less likely to be open to any of the asked options, including industry certification and micro-credentials.

## SECTION 4

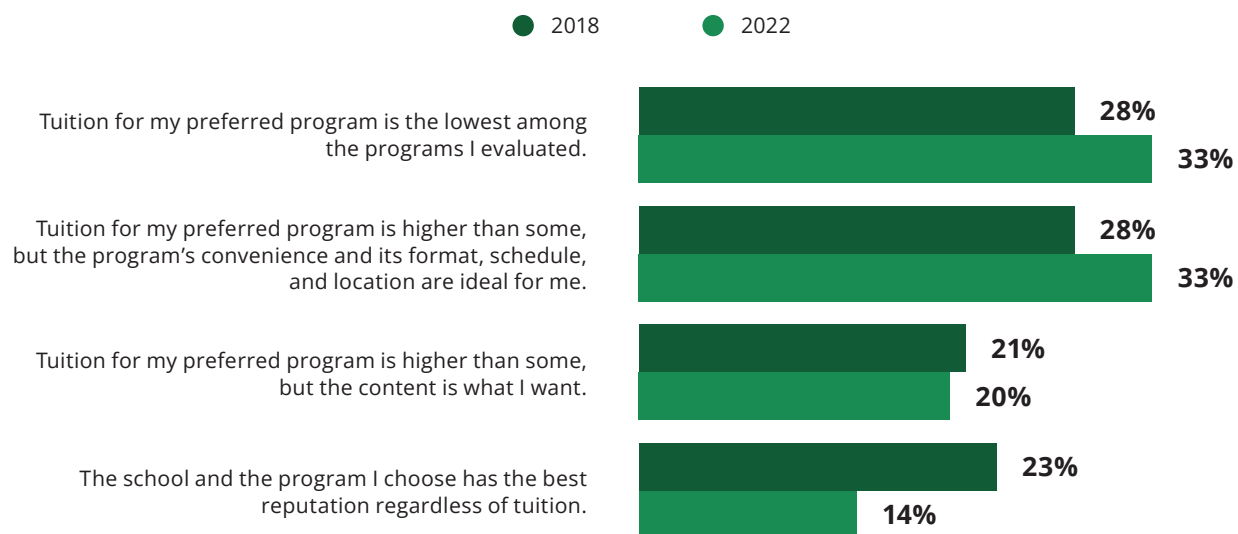
# AFFORDABILITY AND OTHER BARRIERS TO ADMISSION

## Cost is Key, But Not Always King

Tuition and fees are top reasons learners choose one program over the other, but **learners fall on a spectrum when it comes to cost**. On one end are **reputation-first learners**. Fourteen percent of online learners would choose the program with the best reputation regardless of the tuition cost, indicating that price won't be their deciding factor. However, this sentiment is down from 23% in 2018. On the other end of the spectrum are **cost-first learners**. One-third (33%) said they would choose the program with the lowest tuition when making their decision, which increased from 28% in 2018.

Between these two ends of the spectrum are **structure- or content-driven learners** who value other program aspects over cost. One-third of students value a program's convenience, format, scheduling, and location, and an additional 20% value a program's specific content over price.

### Which of the following statements about tuition is closest to how you will make your enrollment decision?







**More than half (55%) of current and recently graduated online learners report receiving financial help when entering their programs.** Tuition discounts (24%) and scholarships (21%) were the most common, while free textbooks (16%), locked-in tuition rates (14%), free technology equipment (11%), and receiving a free course (5%) were the least common.

These findings track with general trends around discount rates, which are continuing to [hit record highs](#).<sup>4</sup> Like scholarships, these appear to have become a regular part of the admissions process. Our 2021 study also found that discounts, scholarships, and free textbooks were very likely to motivate online learners to choose one school over another.

#### Did you receive any of the following when you enrolled in your program?

	2022 Current/ Recently graduated (N=1,503)	2021 Very likely to choose one program over another if received
Tuition discount	24%	78%
Scholarships	21%	70%
Free or no textbooks	16%	70%
Locked-in tuition rate	14%	69%
Free technology equipment (e.g., computer, iPad)	11%	67%
First and/or last class free	5%	61%
I did not receive any of the above when I enrolled	45%	-
Other	3%	-

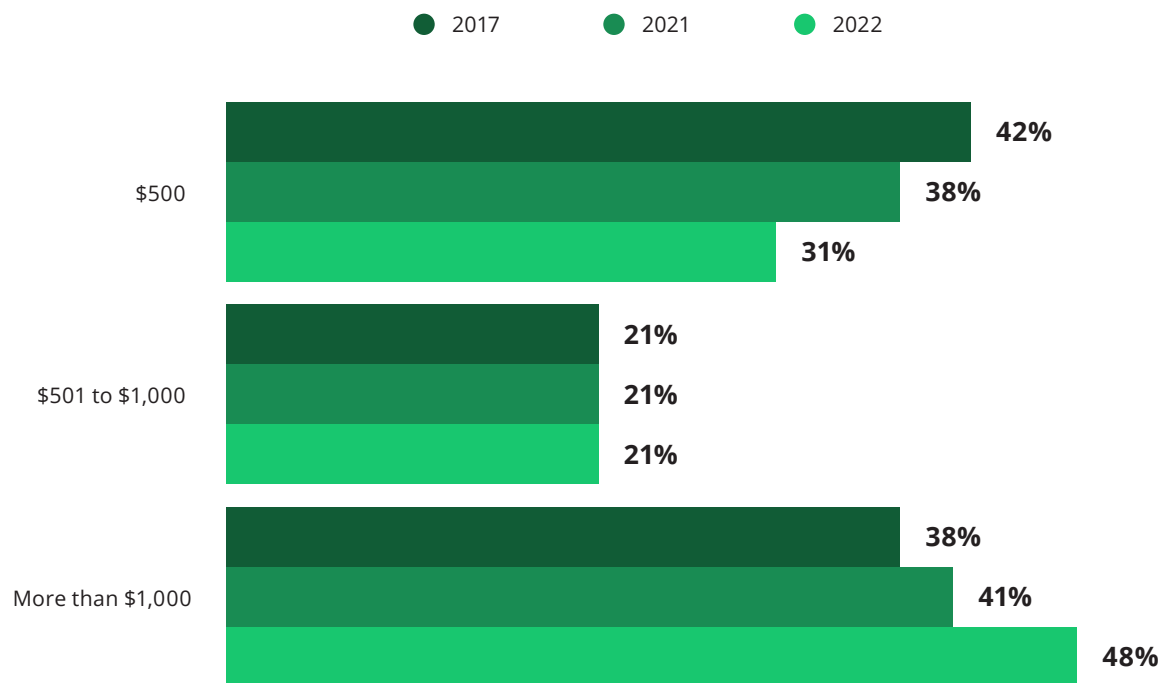
<sup>4</sup> From NACUBO, as reported on May 19, 2022. <https://www.nacubo.org/Press-Releases/2022/Tuition-Discount-Rates-at-Private-Colleges-and-Universities-Hit-All-Time-Highs>

## Smaller Scholarships Wield Less Influence

The importance of scholarships cannot be understated. Tuition and fees remain critical factors in students' decision-making process, and one in five online learners receive a scholarship. For example, **for as little as a \$500 annual scholarship, 31% of online college students said they would be very likely to enroll in one school over another.** And an annual scholarship of at least \$2,500 could sway up to 71% of learners to choose one school over another.

**While micro-scholarships are still important, they've become less influential.** For example, in 2017, \$500 could sway up to 42% of online learners, while more than \$1000 would motivate 38% of learners. In 2022, however, \$500 would influence 31% of learners, and more than \$1000 would compel 48% of students.

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

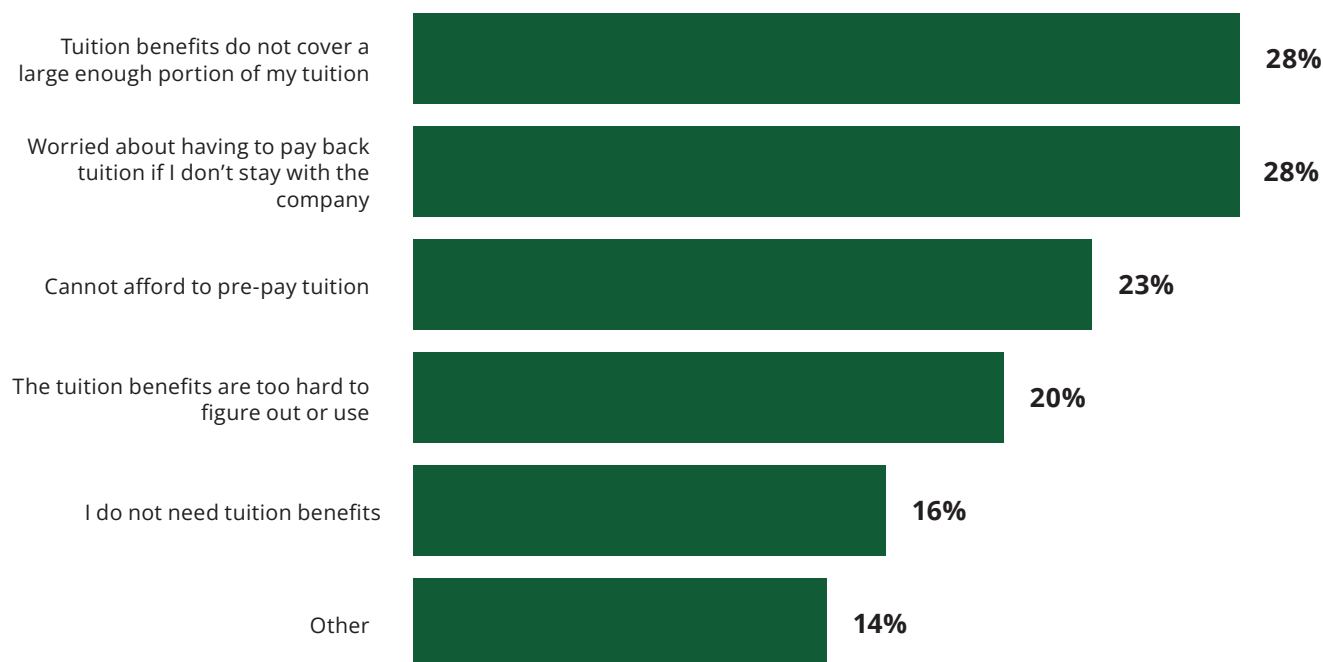


# Some Have Employer Tuition Benefits, Few Are Using Them

**One-third of online learners have access to tuition reimbursement benefits, but almost half don't plan to use them.** When asked why, learners cited several payment-related reasons. They reported benefits not covering enough of tuition (28%), worrying about having to “pay back” the tuition if they leave the company (28%), and being unable to afford pre-paying tuition before getting reimbursed (23%).

**Learners also cited process, time, and eligibility concerns.** One in five (20%) felt their benefits were too hard to figure out how to use, and those that had “Other” concerns (14%) noted such issues as being too busy to figure out the benefit, wanting to use it but not being able to because the school didn't meet employer eligibility criteria, or benefits not covering a certificate program. Among current online learners and alumni, 25% received a tuition discount for their program through an employer-sponsored benefit.

**What are the main reasons why you will not use your tuition benefits? (N=394)**





## RECOMMENDATION

# Showcase Program Value and Give Employees Opportunities

Most learners' motivations are pre-determined, so it's best to **highlight program details that naturally align with those priorities**. For instance, your website should make tuition information, including discounts, transparent and easily accessible because cost is a top factor for most online learners. Your website should also easily direct special populations, such as military learners, to any applicable tuition discounts.

But cost isn't the deciding factor for all learners. That's why you should identify what's unique and valuable about your specific programs and highlight those in all marketing, especially on your website. This is critical for attracting learners for whom other considerations such as program structure (e.g., format, scheduling, or university location) or curriculum content can be the deciding factor.

**Cultivating relationships with regional employers can also lead to substantial growth opportunities.** For instance, you can determine which programs would appeal to employees, establish your institution's eligibility to participate in tuition benefits, and set up employee scholarships and tuition discounts.

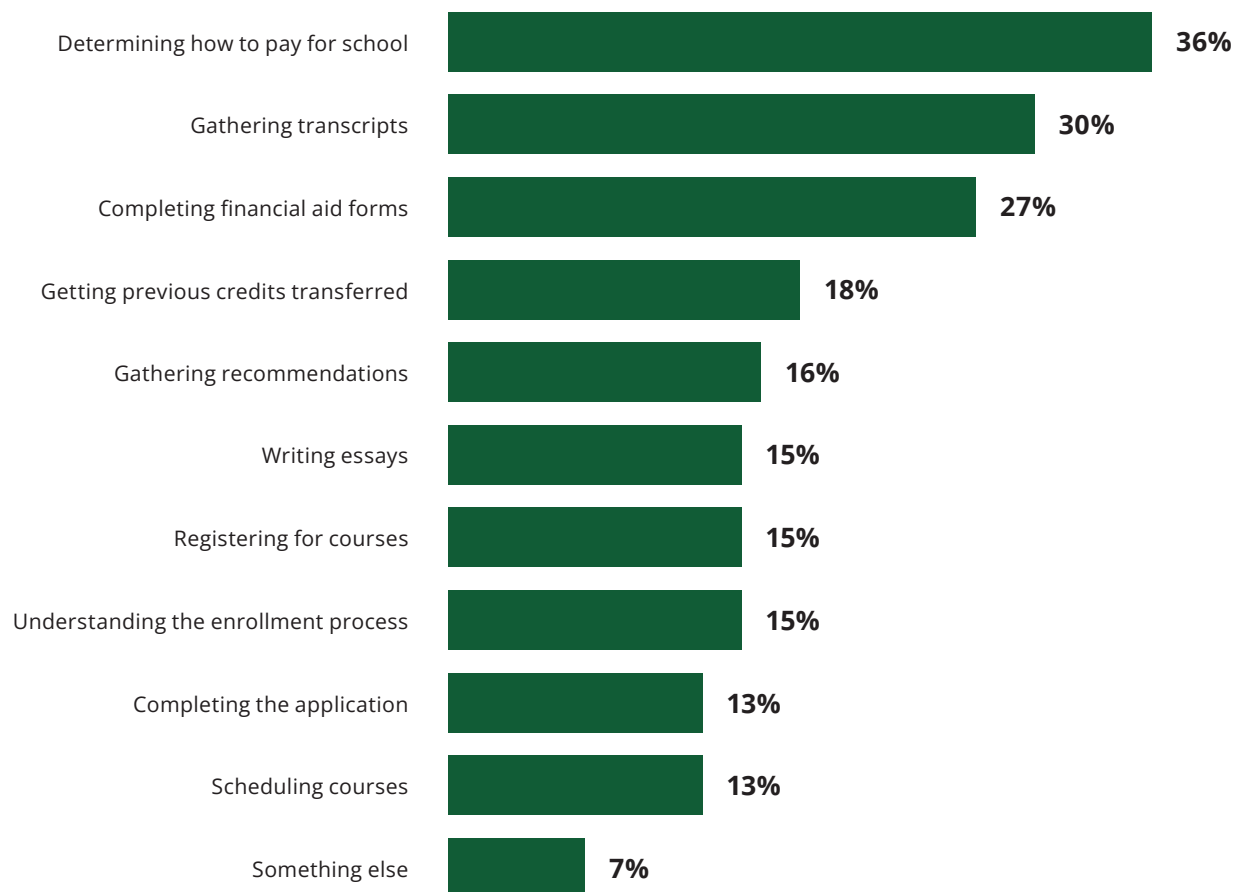
No matter the employee education opportunities you create, ensure both the employer and your college admissions counselors proactively inform employees about their benefits and empower employees to use them.

# Finances and Enrollment Logistics Make Applications Difficult

Just as finances heavily influence online learners during the program search and consideration stages, **finances are the top concerns during the application process**. Determining how to pay for their program tops learners' list of concerns (36%), with completing financial aid forms as their third most challenging issue (27%).

Beyond financial difficulties, enrollment logistics trouble learners most. Gathering transcripts (30%) was their second most significant challenge, and getting previous credits transferred (18%) was their fourth-biggest concern.

## What is the most difficult part of your admissions process?







Receiving credit for previous learning is essential as **most undergraduate learners (65%) have credits to transfer to their next program**. Among undergraduate students, 31% hold one to 30 credits, 22% have more than 60 credits, and 12% have 31 to 59 credits to apply to a new program.

Interestingly, 7% of online students seeking an undergraduate degree have already earned a bachelor's degree. Excluding these learners, the proportion of online students who had credits to transfer in 2022 is lower than in 2016. This could be attributed to an influx of pandemic-driven online learners newly starting their degrees. Although slightly fewer learners had credits to transfer, the gross number of transfer credits in 2022 is similar to 2016.



#### DIVE DEEPER

## Understanding Dissatisfied Online Learners

A small percentage of current and recently graduated online learners (6%) said they likely wouldn't learn online again if they had to do it over. This group had concerns about the quality of online instruction and didn't appear to value the typical benefits of online learning, such as an asynchronous learning format, quicker time to completion, or the ability to customize their degree. As a result, these students likely needed more time management support from their advisor and regular check-ins with their instructors.

NEXT STEPS:

# HOW TO GROW AND SUPPORT ONLINE LEARNERS



The data we collected for this survey point to specific actions you can take. With these recommendations, you can improve how prospective learners find your programs and ensure your current and future online learners graduate and accomplish their goals.

## Learn more about your pandemic-era learners' needs to ensure they persist.



Identify and reach out more frequently to students enrolled in online programs due to the pandemic to ensure they're engaged and well-informed about support services.



Try to understand and address any issues they may have in their online programs. For instance, if they need more engagement with their instructors, how can you help facilitate regular check-ins?



Consider more fluid learning opportunities for pandemic-driven students to explore their options and learning modality preferences.



### Build long-term relationships with alumni and plant the seed for future learning.



Many online learners want to stay engaged with their college or university post-graduation, whether through social media or additional study. Contact learners nearing the end of their program to understand if, about what, and how they'd like to communicate after graduation.



Inform students of additional learning opportunities, including the next degree they can obtain, skills-based coursework or certificates you offer, and a direct point of contact regarding any questions. Also, be sure to provide them with an alumni scholarship or discount.

### Consider targeted, high-impact synchronous opportunities.



Though most online students prefer asynchronous learning, targeted, synchronous online sessions may enrich certain learning experiences. Explore how synchronous weeknight sessions once or twice per semester could improve courses with complex material. As you implement synchronous sessions, ensure you provide equitable learning options so all students can participate.



Clearly and proactively communicate any synchronous sessions with learners before they register for courses. Such requirements would be a novel part of their program and may require adjustments to their non-academic responsibilities.

## Foster relationships with local employers and help communicate education benefits to employees.



Local employers are a significant source of potential learners. But first, you need to understand employers' needs and how they plan to support their people. Once you do, you can develop a strategy to ensure your university, local employers, and future students all benefit.



Consider tailoring existing programs to emphasize the skills employers need most. Understanding employers' needs may even lead you to develop brand new programs.



Offer employees a scholarship or discount and help employers and admissions counselors proactively communicate benefits.



Try to understand employers' education benefits and what might be preventing employees from using their benefits more.

## Focus on digital marketing channels, especially your website.



Digital marketing channels, such as email, search engines, third-party website listings, and social media, are more effective for marketing online programs than non-digital mediums. Link all ads to your website, whether to the online program's listing or a program-specific microsite. And make sure the information learners need most, such as tuition and fees, course information, and admissions requirements, are transparent and easy to access.



A digital marketing and recruitment strategy is critical to growing online enrollments since prospective learners primarily use digital information sources to search and apply to programs. That's why we recommend investing in high-impact digital marketing channels, such as optimizing your SEO and tailoring your university website messaging to appeal to your ideal learners as they gather information and decide to apply.



# METHODOLOGY

In the spring of 2022, Wiley University Services surveyed 2,500 individuals nationwide. Respondents were at least 18 years of age and had a minimum educational credential of a high school degree or equivalent. They were also recently enrolled, currently enrolled, or planned to enroll in a fully online undergraduate or graduate degree or certificate program in the next twelve months.

In the fall of 2019, graduate students represented 15% of the total college population but 29% of the online population.<sup>5</sup> The sample for this survey was weighted to constitute approximately 59% graduate students. This ensured a large enough sample to draw meaningful conclusions about this significant segment of the online learning market. We combined undergraduate and graduate data unless there were noteworthy differences.

The sample consisted of 2,464 respondents. Of these, 1,310 responses came from an external, national panel, and 1,155 were from an internal panel of prospective, current, and recently graduated students at Wiley partner institutions.

To recruit for the external sample, a panel of consumers from across the nation were asked to participate in an online survey through custom email invitations. Invitations were sent randomly across the US to reflect the basic population distribution, targeting persons 18 or older. Panelists were then allowed to participate in the study if they had participated in or were planning to enroll in a fully online degree or certificate program.

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

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

In 2019, 3.45 million higher education students were enrolled in courses exclusively delivered via distance education.<sup>6</sup> Based on these findings, a sample of 2,464 represents an approximate sampling error of +/-1.98% at a 95% confidence level.



<sup>5</sup> We compared our sample to the most recent version of the Digest of Educational Statistics (the 2020 edition) which uses figures from 2019.

<sup>6</sup> Ibid.





## Study Demographics

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

Demographic	2022 Voice of the Online Learner Sample	US Higher Education 2020 <sup>7</sup>
Male	29%	41%
Female	69%	59%
White	68%	52%
African American/Black	20%	13%
Hispanic	12%	19%
Asian	6%	7%
Under 35	67%	89%

### Access more insights about online learning

We're committed to thought leadership and driving growth through research. From research reports and podcasts to infographics and case studies, [our resources](#) offer insights on how your university can succeed as higher education evolves.

<sup>7</sup> From the 2020 edition of the Digest of Education Statistics

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## Technical Notes

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



## COMPANION REPORT Online Learner Experiences 2022

Online Learner Experiences 2022, formerly *Student Perspectives on Online Programs*, is a survey of over 2,000 learners enrolled in Wiley-supported online programs and is a companion piece to this report. The study looks at how colleges and universities can improve online learner satisfaction and outcomes by enhancing student support, course design, and online learning community engagement. It also contains an actionable checklist to elevate the online learning experience based on what students value most in the online classroom.



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