



2023

MARKET INSIGHTS BY WILEY

# VOICE OF THE ONLINE LEARNER

Responding to students' evolving preferences and concerns



---

# 2023

MARKET INSIGHTS BY WILEY

# VOICE OF THE ONLINE LEARNER

Responding to students' evolving preferences and concerns

**David Capranos**  
**Loralee Dyers**  
**Andrew J. Magda, Ed.D.**

The authors thank the following individuals for contributing to this project: Maya Leon, Shandi Thompson, Brianna Hines, Dave Girtman, Helen Eassom, Payton Rigsby, Anna Blake, and Tamar Kimmel.

**Suggested Citation:** Capranos, D., Dyers, L., Magda, A. J. (2023). *Voice of the online learner 2023: Responding to students' evolving preferences and concerns*. Maitland, FL: Wiley Inc.

June 2023

Copyright ©2023 by Wiley Inc.  
All rights reserved.

---

# CONTENTS

**Introduction** .....5

**2023 Key findings**.....8

## SECTION 1

**Views and value of online learning** .....11

The pandemic continues to shape opinions ..... 11

Primary concerns around online learning persist ..... 12

Outside issues cause learners to leave programs ..... 12

Degrees are key to their career goals ..... 14

Graduates achieve positive career outcomes ..... 16

Online alumni want to engage with their alma mater ..... 17

## SECTION 2

**Understanding their decision-making process** .....18

Online learners prioritize modality over institution ..... 18

Affordability is a top influential factor ..... 20

Students recall digital over non-digital marketing ..... 21

The institution's website is a primary research tool ..... 22

Online learners are open to degree alternatives ..... 23

## SECTION 3

**Affordability and other admissions roadblocks** .....26

Value-adding features can outweigh tuition costs ..... 26

Learners dip into their savings despite financial assistance ..... 27

Reducing hurdles during admissions processes can help ..... 30

## SECTION 4

### Online program enhancements .....32

Online learners prefer shorter terms .....	32
Program formats aren't a one-size-fits-all model .....	33
Online learning remains local .....	35
Learners prefer on-campus laboratory courses .....	37
Students want to use mobile devices for course activities .....	38

### NEXT STEPS:

### How to support online learner growth.....40

### Methodology .....44

### References .....45

### About us .....46

### Authors .....47



## INTRODUCTION

This is our 12th year surveying and reporting online learners' preferences, behaviors, and experiences with regard to selecting and attending online learning programs. Over the past decade, and particularly in recent years, learners' needs have evolved in reaction to transformations in online learning and higher education.

**With institutions facing enrollment declines and increasingly price-conscious students, attracting and retaining online learners are challenging priorities.** As different groups of learners encounter unique struggles, online programs can expand access with greater flexibility and support. Some students are returning to higher education after a time away, while others are the first in their families to attend a post-secondary institution.

In this report, we highlight the range of challenges online learners experience during their educational journey across admissions, academics, and beyond. And we provide specific, actionable recommendations to help you counter hurdles and reduce students' anxieties.

## Trends, results, and actionable insights

Compared to last year, spring 2023 higher education enrollments are steady but still below pre-pandemic levels.<sup>1</sup> Affordability remains a top concern for online learners. Colleges and universities continue to solve for students' needs and counter declining enrollments with tuition discounts, which are sometimes well over 50%.<sup>2</sup>

Still, not all learners base their decision on affordability. For some students, colleges and universities can deliver value-adding features that outweigh competitive tuition. So, higher education institutions may be asking themselves a number of questions. First, **where can additional benefits support learners?** And how can we differentiate our programs?

Furthermore, interest in quicker alternatives to full degree programs remains strong. Learners are open to degree alternatives, such as trade skills certificates, industry certifications, and non-credit certificates. Since students typically perceive these alternatives to be less expensive than full degree programs, they'd be willing to pursue them without financial aid. **As such, when should institutions consider innovating their educational options?**

As we emerge from the COVID-19 pandemic, online learners are becoming more open to synchronous and in-person sessions in their online programs. However, some students are opposed to any on-campus components. **So, how can colleges and universities find the right balance to meet learners' disparate needs?**

To answer these questions, this report details findings to help shape your understanding of the ever-changing online learning marketplace. We also address how to reduce learners' barriers

to enrollment beyond offering discounts, which are increasingly unsustainable for institutions. Considering wider landscape trends alongside our survey results, we've provided:

- **a summary of key findings** at the beginning of the report, with deeper analyses of individual topics throughout
- **actionable recommendations** targeted to specific online learner groups within each section
- **key next steps** to take at the end of the report

With these insights, you can take action to support your diverse population of learners throughout their entire journey, from finding and enrolling in a program to engaging in their studies and reaching their educational goals.



<sup>1</sup> From National Student Clearinghouse, as reported on March 29, 2023. <https://nscresearchcenter.org/stay-informed/>

<sup>2</sup> From National Association of College and University Business Officers, as reported on April 24, 2023. <https://www.nacubo.org/Research/2022/NACUBO-Tuition-Discounting-Study>

## About the 12th edition

In spring 2023, we surveyed over 2,600 prospective, current, and recently graduated online learners to understand:

- what they were seeking in a program
- how they chose where to study
- how they viewed scholarships and tuition discounts
- their preferences in program format, schedule, and location

Since we have over a decade's experience surveying online learners, some recurring questions and topics feature historical trend data. However, other questions are original to this year as we continue developing new questions and topics to stay up to date on learners' evolving views. To learn more about our approach, read the [Methodology](#) section at the end of the report.

We hope the findings and recommendations in this 12th edition help you attract, retain, and engage students as you face the challenges of this continuously changing marketplace.

## What learners keep saying

After 12 years of surveying online learners, we know some of their views and preferences stay the same.

### **Modality comes first.**

Most online learners determine modality before deciding on other factors. Typically, eight out of 10 respondents choose their modality first. And their minds aren't easily changed. Few are willing to switch to an on-campus program if the institution doesn't offer an online program.

### **Students are price-sensitive but value quality.**

When choosing between online programs, affordability has been online learners' top selection factor for 10 of the past 12 years. Nearly one-third typically choose the lowest-priced college or university. However, not all learners base their decision on cost if a school can offer valued benefits to meet their needs.

### **They prefer to stay local.**

For over a decade, most online learners haven't strayed far from home. In 2012, 60% chose an institution within 100 miles of where they live. And this has only increased over the last decade, up to nearly 70% this year. As the number of online programs has grown, students have more options. They're more likely familiar with local brands and therefore choose institutions nearby.

### **Career goals motivate online learners.**

Most online students are employed and seek flexible learning options to help them reach their career goals. As such, career-based outcomes prompt 87% of learners to pursue their degrees. And overwhelmingly, most graduates achieve positive outcomes they can attribute to their degrees, including salary increases, greater confidence, and promotions.

# 2023 KEY FINDINGS

Even as some preferences remain consistent, other trends evolve each year. This year, we gained new insight into online learners' experiences.



## #1

Online learning is a pathway for former stopouts to finish their degrees.



**This year, 42% of our respondents said they previously enrolled in a college-level degree or certificate program they didn't complete.**

Studies of traditional higher education students reflect this finding. Nearly 40% of first-time, full-time freshmen at two-year institutions left school from 2019 to 2020.<sup>3</sup> Online learning has allowed many former non-completers to return and complete their programs. Learners who've returned or are in the process of returning to higher education are motivated to rejoin the workforce, complete an industry requirement, or pursue their credential for a non-career-related reason.

Generally, online programs provide greater access for students who've been previously left behind. **Nearly half (44%) of returning non-completers identify as first-generation college students.** These learners are more likely to note struggles with admissions processes. Therefore, colleges and universities need to proactively identify learners who may need additional support from counselors or advisors.

<sup>3</sup> From Education Data Initiative. <https://educationdata.org/college-dropout-rates>



# #2

## Synchronous learning continues to appeal to online learners.



Seventy-nine percent of surveyed online learners are open to a synchronous virtual learning session at least one time per course, reflecting last year's findings.<sup>4</sup> Even as the pandemic subsides, learners' experiences with synchronous video technology, such as Zoom, appear to have inspired greater acceptance of synchronous learning opportunities in online programs.

This consistent openness to synchronous learning offers an opportunity to alleviate learners' modality concerns. Occasional high-impact synchronous learning sessions could help address worries around unclear expectations and limited instructor and peer interactions.

**Two-thirds of online learners are also interested in programs such as trade skills certificates,** industry certifications, and non-credit certificates. Of this group, 83% would still be interested in pursuing these degree alternatives if financial aid weren't available to them. Online learners are noticing that degree alternatives offer quicker, more affordable ways to build skills compared to full degree programs or for-credit certificates. Even current students and recent graduates reported interest in pursuing degree alternatives in the future.

Translating that interest into enrollments remains a challenge for institutions. But even without financial aid, nearly half of respondents reported they're very or extremely interested in certificates that could stack toward a degree, add to their skill set, or help them gain admission to a degree program. Given affordability concerns when selecting a costly full degree program, learners find value in alternatives. Students remain price-conscious but aren't as worried about paying out of pocket for degree alternatives as they perceive these options to be less expensive.

# #3

## Learners are open to certifications and degree alternatives.



<sup>4</sup> From our Voice of the Online Learner 2022 report. <https://universityservices.wiley.com/voice-of-the-online-learner-2022/>

# #4

## Online learners face admissions roadblocks.



For each of the past three years, **nine in 10 learners have consistently experienced difficulties enrolling in and attending online programs.** This year, they reported difficulties paying for school (31%), gathering transcripts (25%), and completing financial aid forms (22%). Some students, including non-completers and first-generation learners, may need more support during the admissions process.

Additionally, within online programs, **learners are concerned about clarity around expectations (27%), lack of interactions with instructors (27%), and a need for more engagement with peers (19%).** Colleges and universities can alleviate these worries with well-prepared, supported instructors and policies around expectations and interactions. And for prospective learners, clear messaging and purposeful marketing about classroom interactions and expectations can dissuade concerns.

For the past 10 years, affordability has been the top factor affecting an online learner's choice of institution. And while small \$500 scholarships could prompt over 40% of learners to choose one school over another in the past, that's no longer the case. To motivate a similar percentage of students, minimum scholarship requirements have doubled.

**Today, more than \$1,000 in annual scholarships are needed to impact 44% of online learners' decisions.**

To address this, colleges and universities are observing learners' evolving expectations and trying to offer financial support where possible. This year, 61% of respondents received some financial assistance, such as a scholarship, discount, or free textbooks. These are important to students' decisions, given that **29% would choose the program with the lowest cost among those they evaluate.**

# #5

## Students seek more competitive price options.



## SECTION 1

# VIEWS AND VALUE OF ONLINE LEARNING

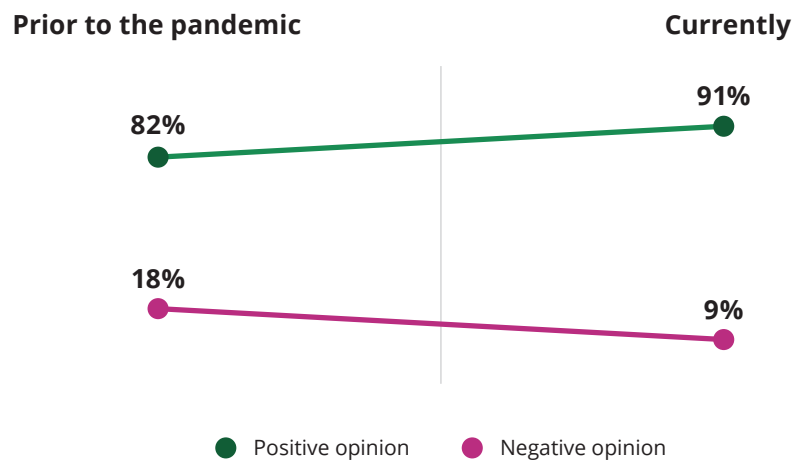
## The pandemic continues to shape opinions

COVID-19 substantially shifted online learners' attitudes toward modality. One in three prospective or current learners who enrolled in an online program between 2020 and 2023 hadn't considered this modality prior to the pandemic. **But most students that enrolled during this time frame (59%) aren't likely to change to a campus-based program in the future.** Once introduced to the online modality, many stick with it.

Still, not all of these learners are loyal to this modality. Eighteen percent of these students said they're likely to change to a campus-based program in the future, and 16% said they're very likely to do so. Last year, a similar one-third reported they'd like to transfer to a campus-based program eventually. Why? Of the students interested in transferring to a campus program, they are mainly motivated to pursue in-person learning to interact more with their peers (49%) and follow their plans to attend an in-person program (36%).

Despite some learners' interest in eventually attending a campus-based program, overall opinions of online learning are more favorable than before the pandemic. **This year, 82% of respondents noted they regarded online learning positively prior to COVID-19, and 91% have positive views currently.** On the flip side, negative opinions fell by half.

### How did/do you view online learning?



## Primary concerns around online learning persist

**This year around a quarter of respondents have consistently expressed concerns about expectations, lack of instructor interactions, and instruction quality.** Online learners don't want to miss out on the positives of in-person courses. The good news: Institutions can address many student concerns with updated policies, such as those around clear expectations and classroom interactions.



### RECOMMENDATION

## Remove roadblocks for prospective and previously stopped-out students.

As enrollment declines continue, institutions should consider ways to alleviate prospective learners' top concerns. Our [Online Learner Experiences 2022](#) report showed that many prospects' worries about the modality can be addressed with well-designed courses, policies around expectations within the learning environment, and well-prepared and supported instructors and counselors. Institutions should not only take these actions, but also communicate them to learners in messaging on their websites and in other key informational material.

Online programs can expand access to higher education for students who haven't completed their degrees as long as they can receive the support they need. To enable non-completers' return to school, institutions should consider offering more frequent and earlier check-ins. Counselors should also introduce former stopouts to available support services and review the institution's policy for taking time off.

## Outside issues cause learners to leave programs

Forty-two percent of respondents said they previously enrolled in a college-level degree or certificate program they didn't complete. Regardless of program modality, 54% of these formerly stopped-out learners left within six months. However, they're now turning to online learning programs after an extended time away from higher education.

Previous non-completers originally attended institutions in various modalities. Seventy-two percent of former stopouts surveyed enrolled in and left an online or hybrid learning program. However, these students were willing to enroll in another online learning program once ready to resume their education, suggesting that the online modality wasn't the main issue.

Indeed, most previously stopped-out learners didn't leave school for reasons related to the modality, program, or institution. **Rather, their top motivations included a change in family circumstances (28%), a physical or mental health issue (22%), and running out of funds (21%).** It was less common for these students to cite issues with the program itself, such as not liking the school or program (16%), finding the classes uninteresting (15%), or not liking a professor (9%). As they return to higher education, their top reasons include a change in finances (17%) and wanting to start at a new school (13%).



## LEARNERS EXPLAINED

### Former stopouts

Millions of students stop out of higher education each year, with only a small fraction returning to complete their degrees.<sup>5</sup> Community colleges in particular faced significant enrollment difficulties during the pandemic. Although enrollments are still down this year, they've started to recover.<sup>6</sup> Former stopouts who've returned to higher education can provide some insight into this group of learners.

Our survey found a sizable group of online learners who left a college-level degree or certificate program in the past but have since returned to higher education. These respondents are **more likely to be enrolled in an undergraduate program.** And **they stay local** since they're likelier to be interested in visiting campus and more open to synchronous online learning or occasional on-campus sessions.

The flexibility of online programs can help formerly stopped-out learners access the education they need to reach their goals. Former stopouts returning to school are **interested in program completion time.** Having already started their higher education journey, these students seek ways to complete their degrees quickly. But they also want to add high-value interactions to their learning, which they may not have pursued in the past.

**These learners are less motivated to earn their degrees for career advancement, such as a promotion, or a salary increase.** They often want to return to the workforce, complete an industry requirement, or pursue their education for non-career related reasons, such as their love of learning or achieving personal growth.

<sup>5</sup> From National Student Clearinghouse, as reported on April 25, 2023. <https://nscresearchcenter.org/some-college-no-credential/>

<sup>6</sup> From National Student Clearinghouse, as reported on March 29, 2023. <https://nscresearchcenter.org/stay-informed/>

## Degrees are key to their career goals

Students have strong views about the value of their online programs. Most online learners recognize their degree can help them reach their career goals and advance their job prospects. Overall, **more than three-quarters of respondents believe a college degree can lead people to better jobs.** However, only 55% of Gen Z learners (18- to 26-year-olds) agree that a bachelor's degree helps with their goals, while 64% of millennials (27- to 42-year-olds)<sup>7</sup> agree.

Students sense some limitations around how far a college degree can help them progress, which could be contributing to enrollment challenges. Most responding online learners (61%) agree that a college degree doesn't take people as far in their careers as it used to. Interestingly, younger learners are more optimistic than older generations on this point. Gen Z learners are less likely to agree that a bachelor's degree doesn't take people as far as it once did, compared to millennials, Gen X (43- to 58-year-olds), and baby boomers (59- to 68-year-olds).<sup>8</sup>

*82% of online learners believe their degree is very important in helping them achieve career goals.*

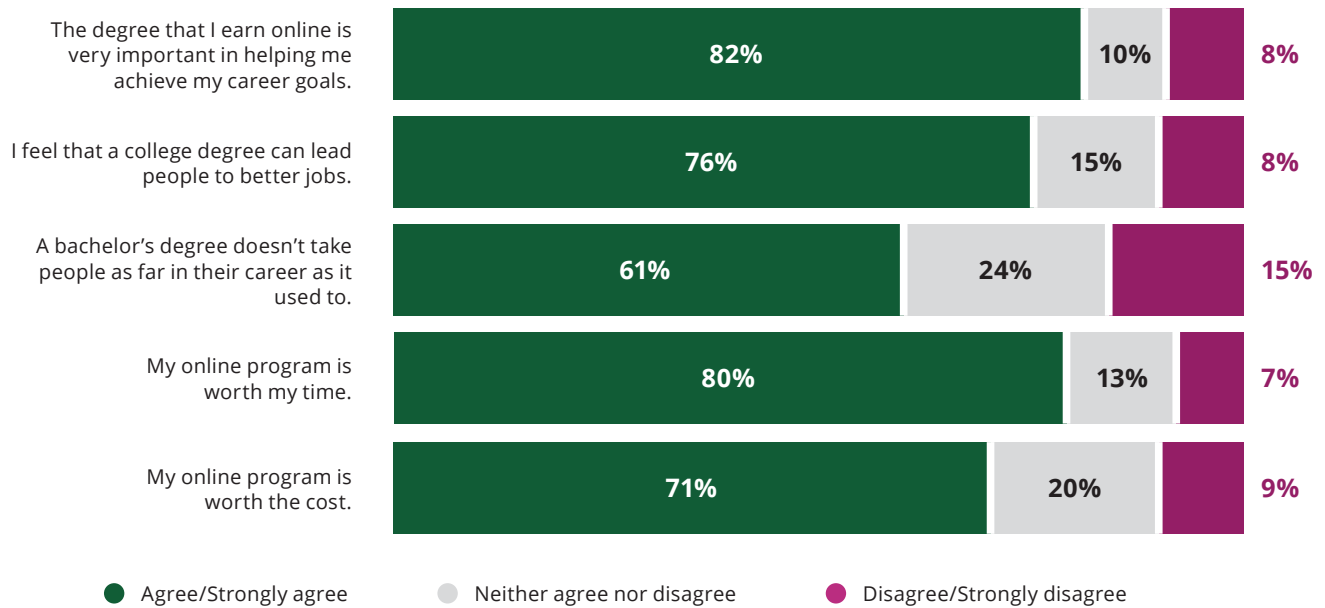
Still, in many areas, online learners agree their programs deliver value. **Eight in 10 would enroll in an online learning program again**, and about as many perceive their program is worth their time. And even with growing affordability concerns, 71% agree their degree is worth the cost.



<sup>7</sup> Generational age ranges from Beresford Research. <https://www.beresfordresearch.com/age-range-by-generation/>

<sup>8</sup> Ibid

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



### LEARNERS EXPLAINED

## Gen Z online students

Gen Z learners (18- to 26-year-olds)<sup>9</sup> grew up with early exposure to mobile devices, making them feel comfortable using technology. Now, this generation of online learners surveyed is more likely to want to complete all or most course-related activities on a mobile device compared to older students.

However, their interest in using technology for their studies doesn't mean they're more dedicated to the online modality. The majority of Gen Z online students align with other generations' commitment to online learning, but they're overall less likely to have considered online learning before the pandemic. Gen Z online learners are also more likely to plan on switching to a campus-based program as they complete their degree. If their program weren't available online at their institution of choice, they'd be more likely than older learners to enroll in the on-campus program at that school instead. However, the majority would still enroll in an online program.

Due to COVID-19, Gen Z online learners were likelier to have faced some educational disruption in high school or post-secondary school. Experiencing emergency remote online learning during the pandemic may now translate into their interest in an on-campus, in-person experience. As a result, they're keen to use technology in some areas of their studies but not all.

<sup>9</sup> Ibid



## Graduates achieve positive career outcomes

Online learners focus on obtaining their degrees to achieve career-related outcomes. They're motivated to receive a salary increase (48%), advance their careers (46%), or gain marketable skills (41%). Switching careers is the next largest motivation (30%), followed by increasing confidence (29%). Since most students have these goals in mind, programs must be able to deliver career-connected results.

**Of those who graduated within the past year, most graduates (92%) reached a positive outcome they can attribute to their degree.** The most common outcome was a salary increase (45%), followed by increased confidence in the workplace (32%), and receiving a promotion (28%). This demonstrates online programs deliver tangible value and **helps** graduates attain positive career results. And even if some learners don't trust their degree will take them as far as it once could, they still turn to degree programs to reach their goals.

### Which can be attributed to you receiving this degree?

Select top three. (N = 520)



*Over 90% of recently graduated students within the past 12 months are already reporting positive outcomes.*



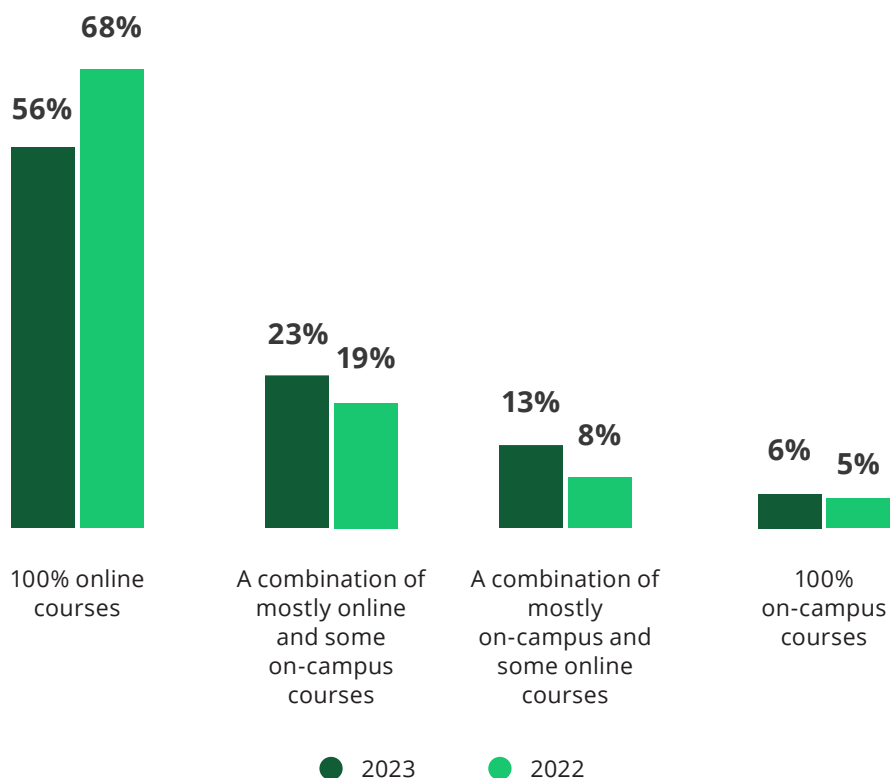
# Online alumni want to engage with their alma mater

Learners generally want to continue their relationship with their online program. **Nearly half (47%) of respondents said they're likely or very likely to go back to the same institution for another program.** Of those, 56% would want that program to be 100% online, and 36% seek a hybrid experience. Interest in a hybrid experience has increased since 2022, when just over one-quarter of alumni were interested in a blended experience.

Of learners still earning their online degree, 28% reported they would enroll in another program in the future, 27% would take classes, and 42% would refer another student to their college or university. As such, there's an opportunity for institutions to continue engaging with students, leveraging both their interest in returning and their willingness to recommend their online program to other potential learners.

## How would you like to complete the courses for that return program?

Likely/Very Likely Respondents (2023 N = 1,518)



## SECTION 2

# UNDERSTANDING THEIR DECISION-MAKING PROCESS

## Online learners prioritize modality over institution

When setting out to explore higher education options, most learners decide on modality first. More than eight in 10 (83%) choose the online modality before any other factor. In fact, online learners reported that modality is more important than the institution where they study. **If their program weren't offered online at their college or university of choice, they'd be far more likely to find their program offered online at a different school (57%).** Only 20% would enroll in an on-campus program at the same institution.

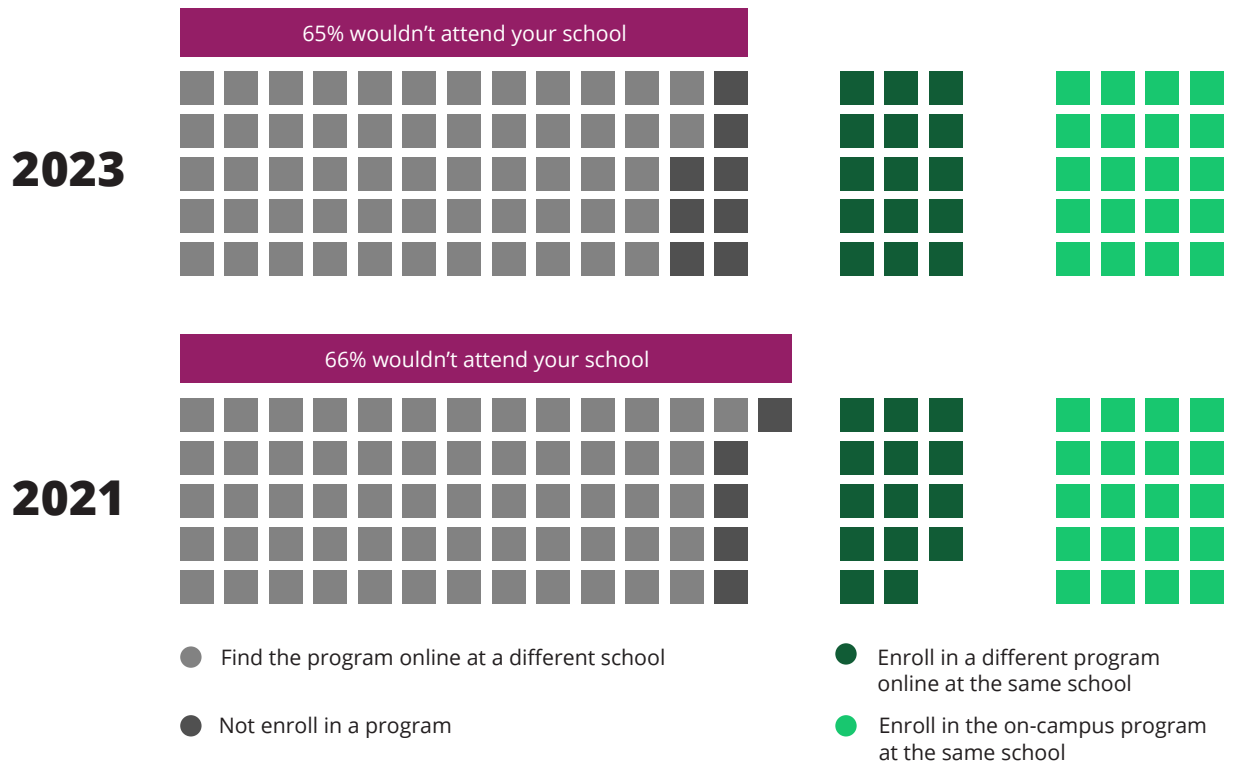
Thus, offering an online version of a program can prevent learners from enrolling in a different institution and is unlikely to drive enrollees away from on-campus programs. The same student is likely picking between online programs at different schools, not between an on-campus and online program at the same institution.

Over the past two years, the percentage of students who simply wouldn't enroll in a program if it weren't available in an online format has grown slightly. Some learners would rather forgo learning entirely than enroll in a campus-based program. In a time of shrinking enrollments at many colleges and universities, this underscores the importance of offering a breadth of online learning opportunities that align with students' preferences.

*83% of online learners choose program modality first.*



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



## LEARNERS EXPLAINED

### First-generation learners

Over one-third of online learners identify as first-generation college students. These learners are likelier to decide on the online modality before anything else, even the institution or program. But they're also more likely than other learners to opt for a different online program at the same college or university if their preferred program isn't available online. **So, their decisions on modality and school remain fixed, while their decision on the program is more flexible.**

Like the previous section's explanation of former stopouts, these students are also **likelier to have started college programs in the past that they didn't finish.** Therefore, offering these learners additional support during their studies can help them complete their degrees and achieve their desired outcomes.

## Affordability is a top influential factor

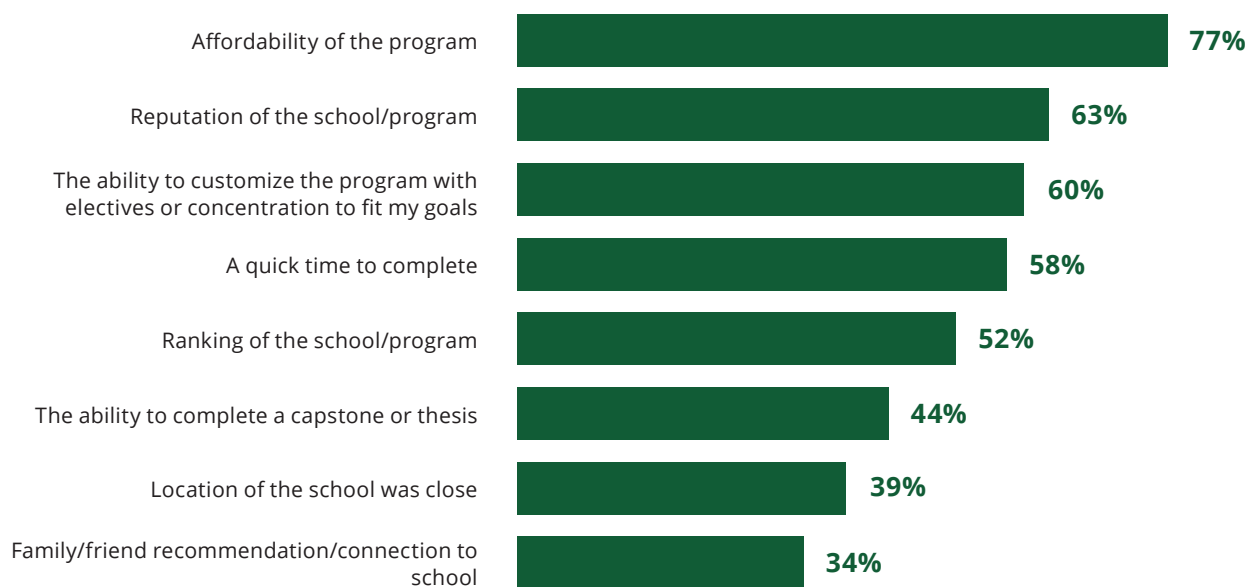
After modality, learners' top considerations are price, speed to a degree, and to their ability to customize their program with electives.

**When initially researching online programs, 77% find affordability the most significant factor.**

Other factors include the institution/program's reputation (63%), the ability to customize the program to fit their goals (60%), and a quick completion time (58%).

When finally applying to a program, affordability (52%) and completion time (31%) similarly top the list, followed by the institution/program's accreditation (28%). Conversely, tuition and fees (35%) were students' main reasons for not applying to a program, followed distantly by on-campus requirements (22%) and completion time (20%).

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





#### RECOMMENDATION

### Differentiate your program with opportunities for customization.

For the past decade, affordability has been online learners' top concern. And especially in today's market, tuition cost is a prevalent factor motivating students' expectations for financial offers. But not every program can be the least expensive option.

One way to help a program stand out and gain learner consideration is the ability to customize a program with electives or a concentration. For online learners, being able to adapt their programs to fit their goals is more important than an institution's rank or physical location. Therefore, customization can add value that impacts students' decisions.

## Students recall digital over non-digital marketing

Three-quarters of online learners responding can recall seeing an advertisement or information about online programs from at least one college or university to which they applied. Respondents most remembered forms of digital marketing, with **Google listings (32%) and email ads (32%) as the most recalled types**. These were followed by ads on college search sites (27%) and Facebook (27%).

On the other hand, learners didn't recall non-digital mediums as often, a trend that's been increasing over the years. For example, 29% of learners recalled TV commercials in 2017, while 21% of respondents or fewer remembered TV commercials and direct mail this year. This declining recall of non-digital marketing aligns with its higher cost compared to digital marketing.

Learners also recalled interacting more with digital ads, including clicking on a link, replying to a message, and visiting a page mentioned. **Respondents most remembered interacting with email ads (35%) and Google listings (34%)**, the same types of ads they most recalled seeing. For the rest of the advertisement mediums, one-quarter or fewer learners recalled interacting with each of them.

---

**Of the schools you applied to, did you see advertisements or information about online programs from those schools in any of the following locations?**

---

	<b>Saw advertisement</b>	<b>Interacted with advertisement</b> <i>(of those who saw)</i>
Email	<b>32%</b>	<b>35%</b>
Listings on Google	<b>32%</b>	<b>34%</b>
Ads on college search sites	<b>27%</b>	<b>25%</b>
Ads on Facebook or other social media sites	<b>27%</b>	<b>25%</b>
Commercials on TV	<b>21%</b>	<b>18%</b>
Direct mail	<b>15%</b>	<b>12%</b>

## The institution's website is a primary research tool

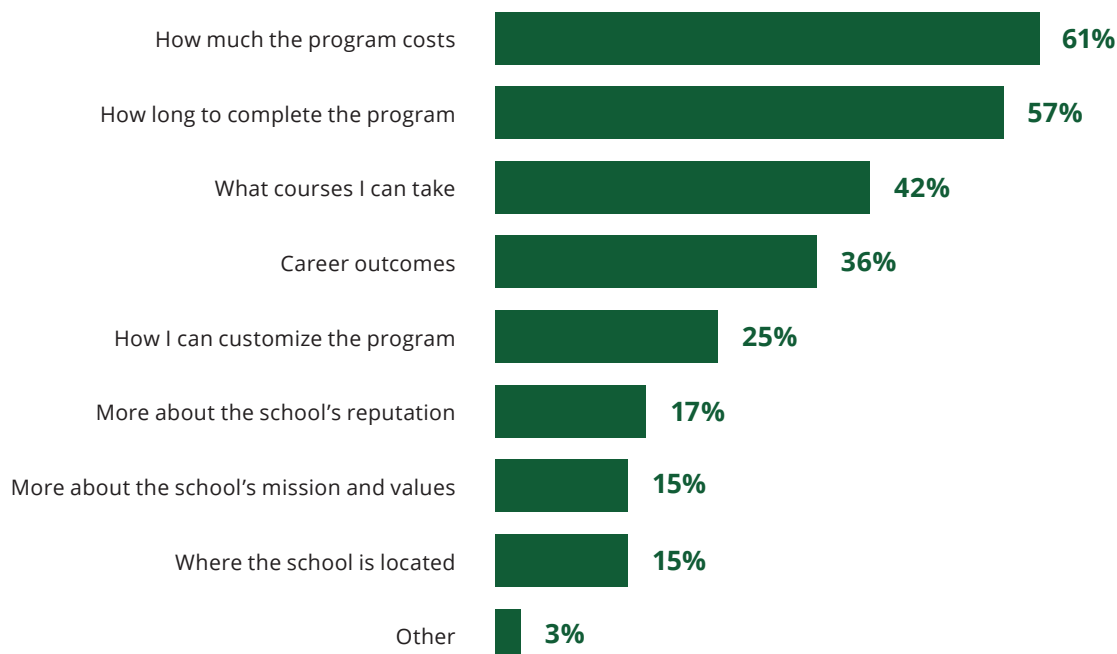
When looking deeper into an institution, online learners stick with digital means. **The website becomes the primary source of detailed information (45%) after identifying an institution of interest.** Most search the site independently, and few use the live-chat function (11%), if available. Just over one-third (34%) email the college or university for detailed information, and another one-third (32%) turn to Google for additional information.

Learners are likely to go directly to the source. Thirty percent would pick up the phone and call the institution. It's less common for students to talk with their employer or co-workers (15%) or alumni (12%) of the institution they're interested in. To find detailed information, learners less commonly use third-party sites, such as college search sites (14%), social media sites (12%), and other college-focused websites (7%).

At this point in their research, **students are most interested in learning about the program's cost (61%) and completion time (57%).** Learners' interest in cost aligns with affordability being the top factor leading them to consider an online program. So, institutions should ensure this information is easily accessible on their website. If such information is difficult to find, learners will likely turn to a different college or university.

## After identifying a school of interest, what are you most interested in learning more about?

Select up to three.



## Online learners are open to degree alternatives

Nowadays, learners aren't only considering full degree programs. This year, enrollment growth is most robust in undergraduate- and graduate-level certificate programs.<sup>10</sup>

**Two-thirds of respondents said they were open to pursuing a non-traditional degree alternative in place of a college degree in the future.** A trade skills certificate (35%) was the most popular alternative, followed by industry certifications (29%).

Using financial aid for such alternatives can be an issue, but learners' interest didn't wane. Even if financial aid wasn't available, 83% expressed interest in alternative credentials. This demonstrates that price-conscious students are less concerned about paying on their own for less expensive degree alternatives.



<sup>10</sup> From National Student Clearinghouse, as reported on March 29, 2023. <https://nscresearchcenter.org/stay-informed/>

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

Select all that apply

	Interest in pursuing in place of a college degree	Would pursue even without federal aid (N = 1,734)
Trade skills certificate/experience	35%	38%
Industry certifications (ex., Six-Sigma, PMP)	29%	30%
Higher education credits but no degree	25%	26%
Non-credit certificate or course options (ex., micro-credentials, digital badges)	20%	19%
None of the above	33%	17%

In our [Closing the Skills Gap 2023](#) report, human resources leaders viewed degrees as important but were open to interviewing candidates with alternative credentials. For instance, when hiring for a role typically designed for someone with a degree, **three-quarters of HR professionals would interview someone with five years of relevant work experience, a certificate, or a digital badge/micro-credential.** Although a full degree remains valuable, opportunities are available for online learners who prefer to pursue potentially less expensive and quicker degree alternatives.

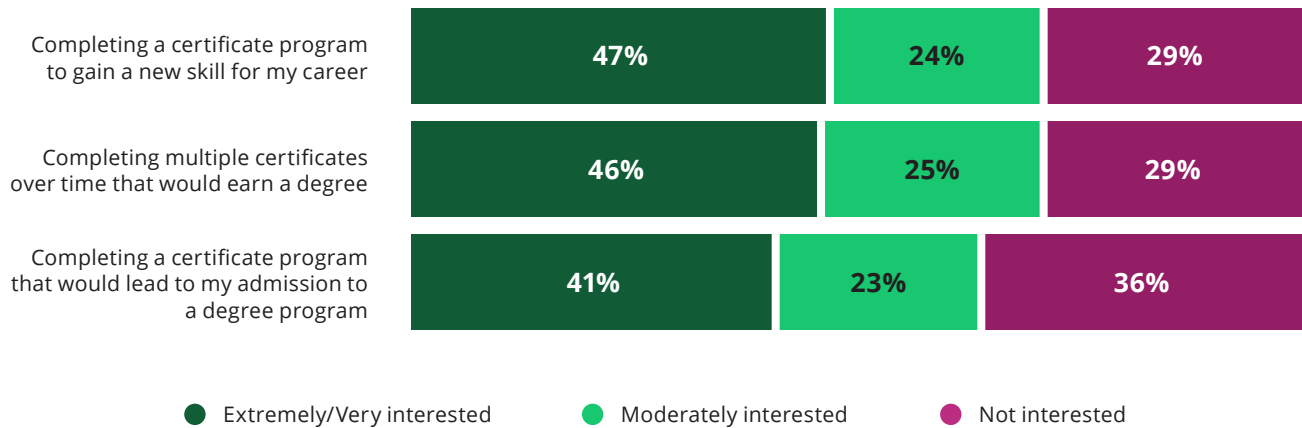
Respondents were similarly open to pursuing “stackable certificates” even without financial aid. Specifically, they were very or extremely interested in certificates to gain a new skill for their career (47%) and certificates building toward a degree (46%).

However, they were less interested in completing a certificate that would help them gain admission to a degree program. Without considering financial aid, learners’ interest in certificates remains similar to last year.

*75% of HR professionals would interview candidates with five years of relevant work experience, a certificate, or a digital badge/micro-credential for a role typically requiring a degree.*



**How interested would you be in the following certificate options if they were available in your subject area of interest, but you couldn't use financial aid to help pay for them?**



**RECOMMENDATION**

**Experiment with alternative degree formats and credentials.**

Online learners are interested in pursuing trade skills certificates or experiences, industry certifications, higher education credits, micro-credentials, and digital badges. Although cost was the number one factor in their full degree online program choice, they wouldn't let a lack of financial aid prevent them from seeking out alternative credentials.

In fact, respondents showed similar interest even when potentially paying out of pocket. These options are often less of a financial burden on learners, so higher education institutions shouldn't let a lack of student aid prevent them from innovating with alternative formats or credentials.

## SECTION 3

# AFFORDABILITY AND OTHER ADMISSIONS ROADBLOCKS

## Value-adding features can outweigh tuition costs

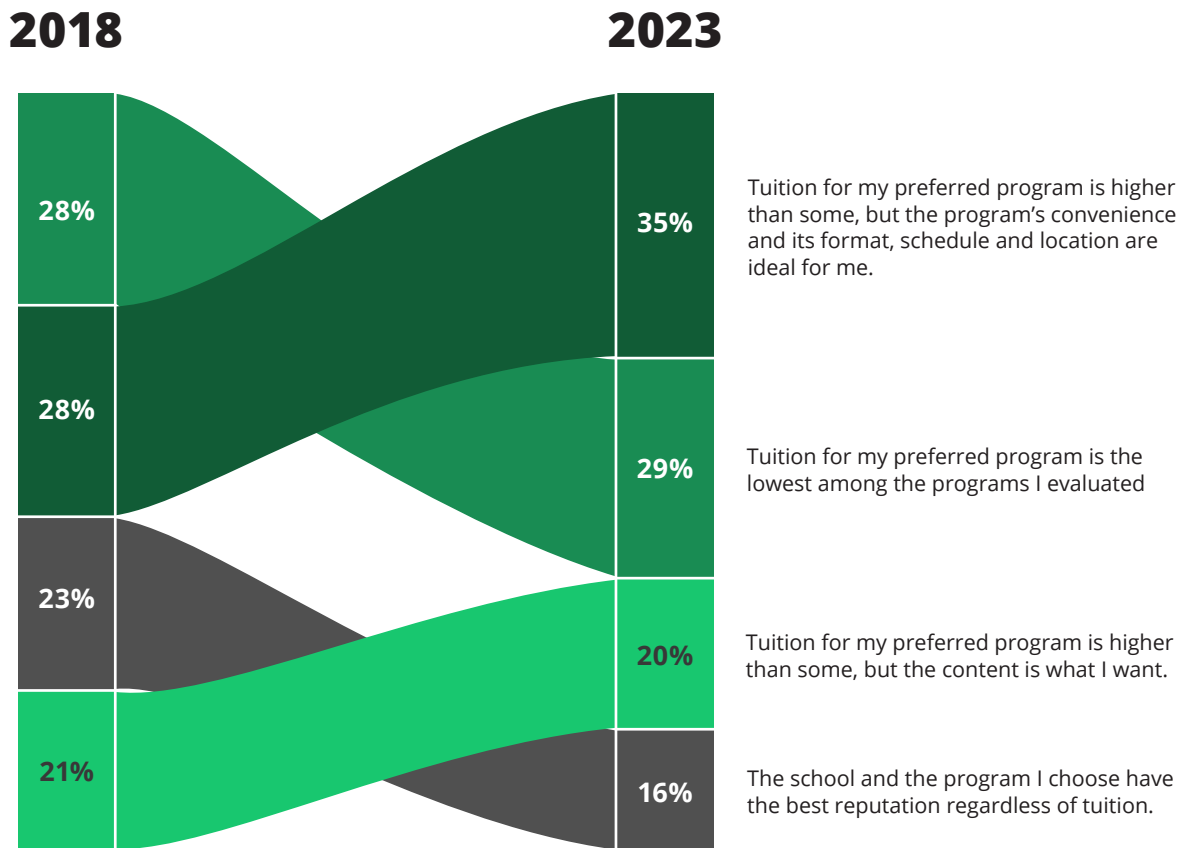
For the past decade, affordability has been one of online learners' top decision-making factors. At the **cost-driven** end of the spectrum, over one-quarter (29%) of respondents would choose the lowest tuition, similar to our findings from five years ago. At the other end, 16% of **status-driven** respondents would opt for the program with the best reputation regardless of cost. However, this sentiment is down from 2018.

Between these two ends of the spectrum are **benefit-driven** students who have value-adding features in mind. Over one-third of respondents value convenience, format, scheduling, and location. If a program isn't the least expensive but includes these features, benefit-driven learners would select it despite the cost. An additional 20% aren't discouraged by their program's cost if it contains specific content.

While cost is very important, online learners are willing to consider other features and benefits. So, properly communicating unique attributes can help learners decide what institution is right for their needs.



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



## Learners dip into their savings despite financial assistance

Discount rates continue to hit record highs as the cost of higher education remains top of mind for students. Indeed, discounts and scholarships appear to be a normal part of the admissions process.

**Over half (61%) of current and recently graduated online learners received some form of assistance this year.**

The most common types of support were scholarships (26%), tuition discounts (25%), and free textbooks (20%). But it was less common for respondents to receive locked-in tuition rates (17%), free technology equipment (17%), or a free course (13%). In 2021, we found that nearly 50 to 70% of online learners were very likely to choose one institution over another for assistance such as discounts, scholarships, and free textbooks.<sup>11</sup> As a result, it's important to note that these forms of aid can significantly factor into learners' final choice of institution.

<sup>11</sup> From our Voice of the Online Learner 2021 report. <https://universityservices.wiley.com/voice-of-the-online-learner-2021/>

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

Select all that apply (N = 1,799)

	Current/Recently graduated
Scholarships	26%
Tuition discount	25%
Free or no textbooks	20%
Locked-in tuition rate	17%
Free technology equipment (e.g., computer, iPad)	17%
First and/or last class free	13%
I did not receive any incentives when I enrolled	39%
Other	3%

Despite receiving financial assistance, **online learners generally relied on their savings (48%) to pay for their education.** Other typical payment methods include loans (47%) and grants (30%). Although scholarships were the most common form of financial support, they were one of the least common payment methods. Only 29% of learners used scholarships, followed by 23% using employer tuition assistance. As such, the financial support students receive doesn't match their needs. However, without any assistance, learners would have to rely on their savings and available loans and grants entirely.

## Impactful scholarships play into learners' decisions

Given the importance of affordability in enrollment decisions, offering scholarships is crucial to learners. **This year, one in four current or recently graduated online learners surveyed received scholarships.** And with a scholarship of as little as \$500 annually, 36% of respondents said they'd be very likely to enroll in one institution over another.

However, the impact of scholarship amounts has started to decrease. In 2018, \$500 could impact up to 39% of online learners' decisions, with 34% seeking over \$1,000.<sup>12</sup> And in 2023, 44% would need a scholarship above \$1,000.

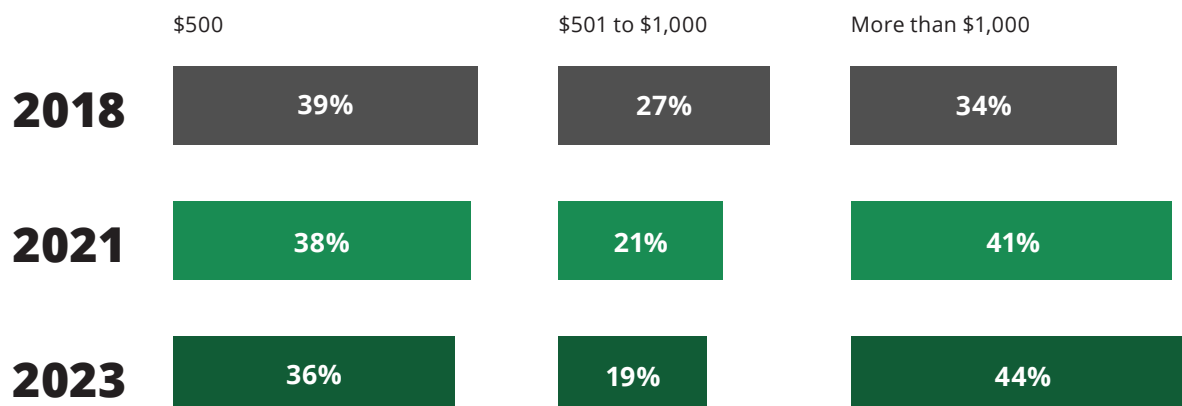
*55% of learners would choose one school over another for an annual scholarship of \$1,000.*

<sup>12</sup> From our Online College Students 2018 report

---

The minimum scholarship that would have impacted a learner's decision to enroll in one school over another.

---



---

**RECOMMENDATION**

**Demonstrate your consideration of learners' needs.**

Learners continue to seek out ways of reducing educational costs. And they're looking for more financial assistance than in the past. Small discounts, scholarships, and other forms of assistance simply don't have the same effect anymore. For example, a \$1,000 scholarship today has the same impact as a \$500 scholarship five years ago.

Online learners are now more than ever seeking additional benefits in the form of conveniences, including scheduling, asynchronous courses, or flexible deadlines. As such, institutions need to continue differentiating their programs and communicating the unique ways they're serving students better.

## Reducing hurdles during admissions processes can help

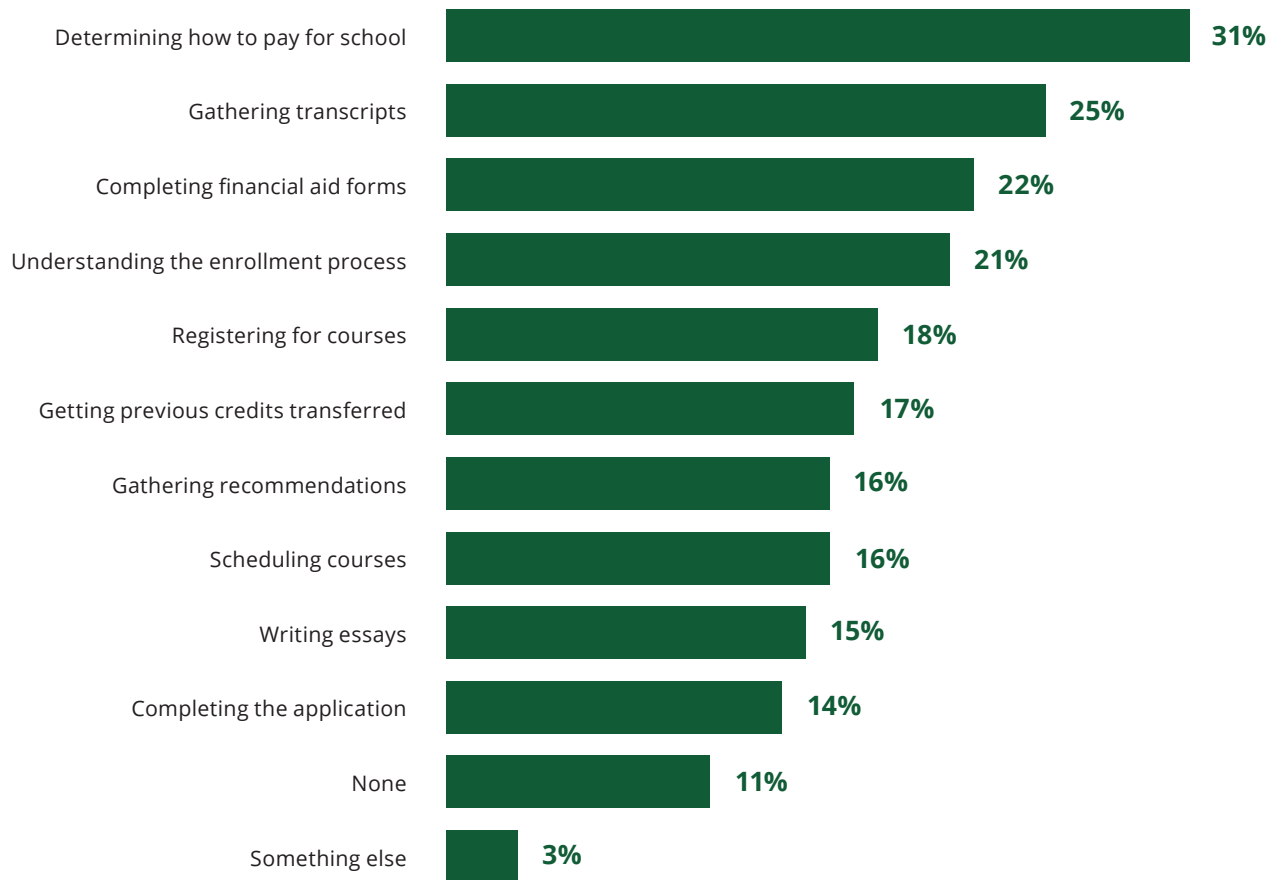
Online learners have concerns with the admissions process, mainly around payment and aid. **The most difficult part for 31% of students is determining how to pay for their education.** They also find it difficult to gather transcripts (25%) and complete financial aid forms (22%). Generally understanding the whole enrollment process was a challenge for around one in five current students and recent graduates. Learners ultimately can't apply if they get stuck early in the process. So, making the admissions process clear and offering support where needed has the potential to alleviate their concerns with enrolling.

Most of the admissions process causes anxiety for at least some students. They're also worried about gathering recommendations (16%), writing essays (15%), and completing the application (14%). Therefore, streamlining processes and reducing hurdles could help learners begin their higher education journey with less stress and more confidence.



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

Select top three. (N = 1,799)



Accepting past credits is also important as **most undergraduate learners (78%) reported having credits they'd like to transfer**. And some of them have a lot. Twenty-seven percent of undergraduate respondents noted they had over 60 credits to transfer into their program. Meanwhile, 38% have one to 30 credits, and 14% hold 31 to 59 credits. Where schools are unable to provide substantial financial accommodations, allowing learners to transfer credits can help demonstrate the institution is conscious of learners' costs.

## SECTION 4

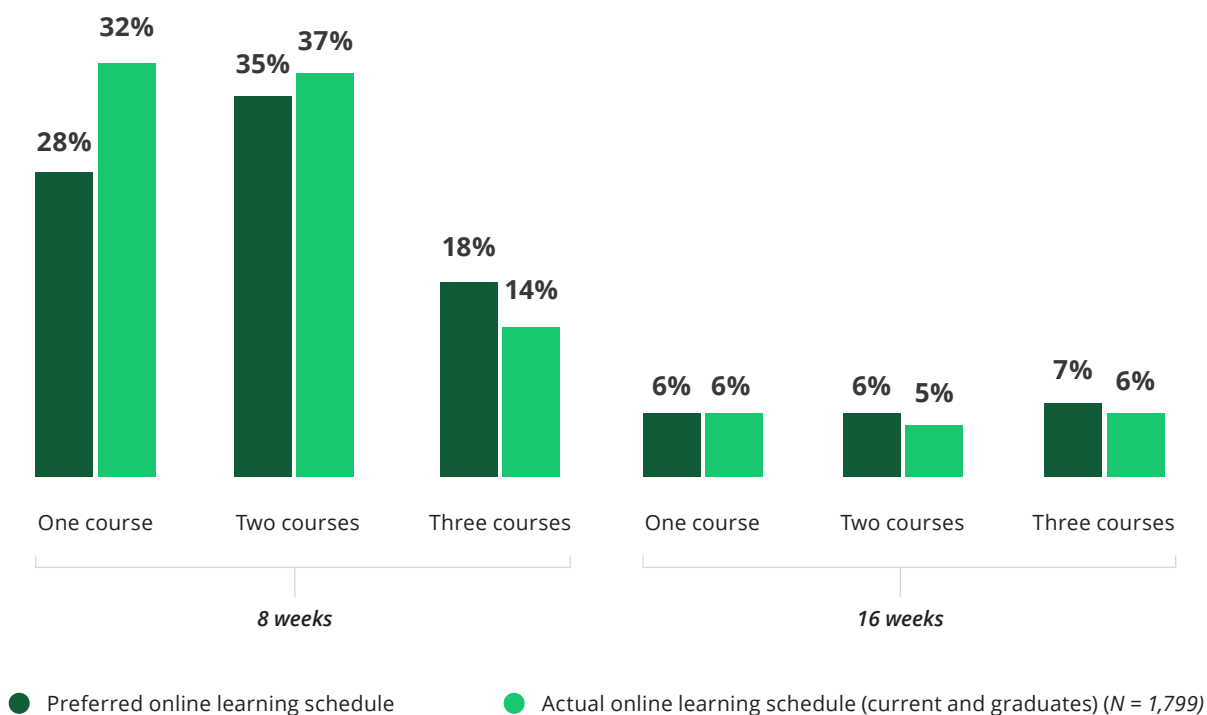
# ONLINE PROGRAM ENHANCEMENTS

## Online learners prefer shorter terms

Most learners favor eight-week terms, with **35% preferring to complete two courses over eight weeks**. This is followed by one course over eight weeks (28%) and three courses over eight weeks (18%). These preferences align with students' actual experiences, as 69% of current and recently graduated online learners reported taking one or two courses per eight weeks.

Meanwhile, only 19% of learners prefer 16-week courses with one, two, or three classes at a time. Compared to those who prefer eight-week courses, these students place less importance on quick completion time and are more likely to have concerns with pace and instruction quality in online courses.

Preferred vs. actual online learning schedule



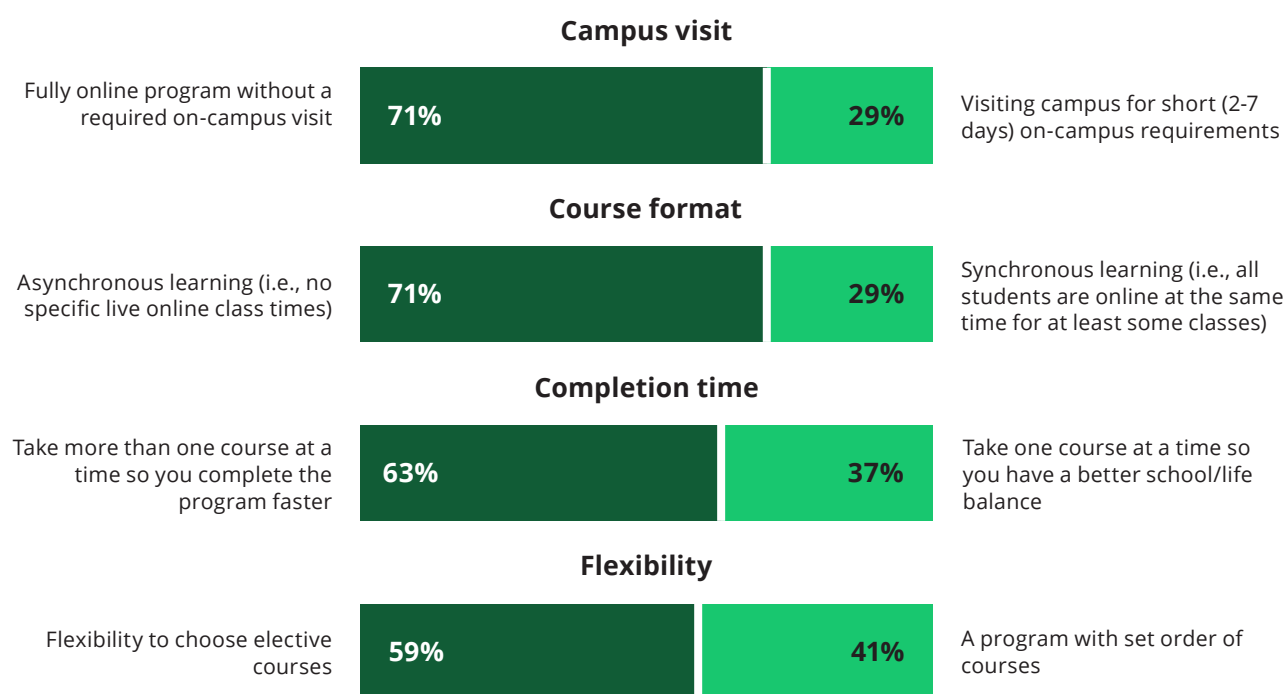


# Program formats aren't a one-size-fits-all model

Students' preferences around program format vary, but there are some commonalities. **The typical online learner prefers a program with fully online (71%) and asynchronous (71%) courses, with the option to take more than one course at a time (63%).** Fifty-nine percent want to customize their learning path with electives to align their program and career objectives.

However, roughly one-third of students don't value these format options, and 29% would prefer at least some synchronous classes. Therefore, it's essential to recognize where changing aspects of a program's format can deliver the most value to learners. General guidelines for serving online learners should be adjusted to an institution's student population.

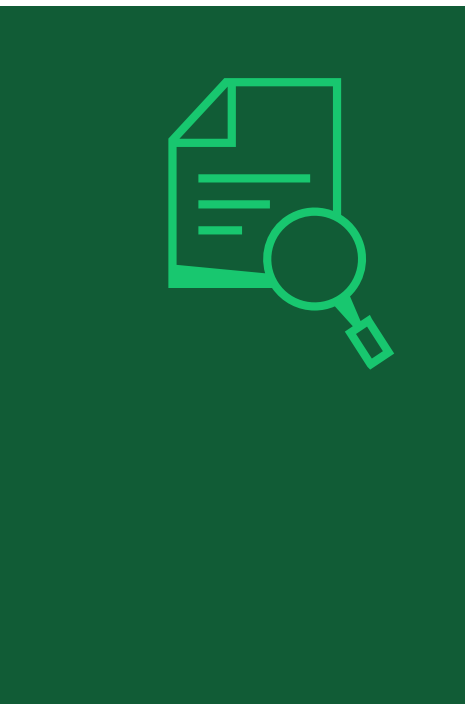
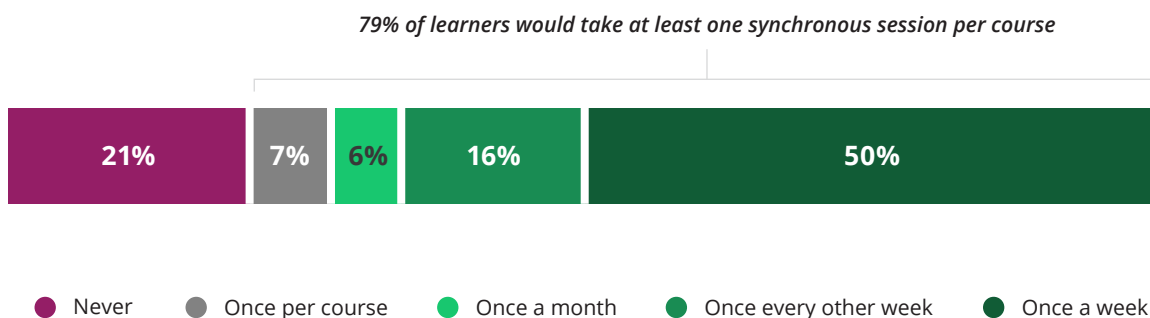
## When thinking about the format of a program, which options do you prefer from the following listed below?



Most online learners prefer asynchronous options, but some synchronous sessions aren't entirely out of the question. **Similar to last year, 79% of online learners are open to some synchronous online component.** Half of online learners would welcome a synchronous requirement once per week. Nearly one-quarter would be open to one synchronous session every other week or once per month.

**If these online synchronous sessions occurred, 60% of learners would like them during weekday evenings.** During synchronous sessions, students find value in asking questions in real time (58%) and receiving better explanations from instructors (52%). Although learners find such meetings valuable, they still need to balance non-academic responsibilities, likely informing their preference for weekday evening sessions.

**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?**



### LEARNERS EXPLAINED

## Synchronous online learners

During the pandemic, institutions shifted to emergency remote synchronous learning sessions, introducing younger students to live online classes. And now, there’s greater interest in synchronous learning. Learners interested in virtual synchronous options don’t differ from those who aren’t open to synchronous learning in terms of degree level, field of study, or employment status.

Moreover, these students were equally open to online learning before the pandemic but are more likely to think about transferring to an on-campus program in the future. **They’re also likelier to be open to in-person class sessions.** Compared to learners who aren’t interested in synchronous online learning, they’re more likely to value their institution’s strong reputation and proximity to where they live.

## Online learning remains local

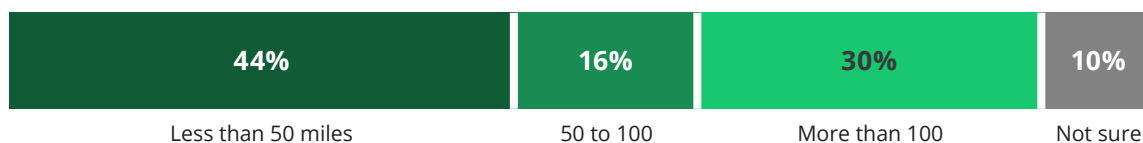
Online learners' preference to attend local institutions endures, even as the pandemic may have started to widen the radius. Before the pandemic, only 13% of learners sought a college or university over 100 miles from where they live.<sup>13</sup> But in 2023, this group has increased to 23% as the pandemic seems to have expanded students' willingness to enroll in a program farther from home.

**Still, over the past decade, online learners have preferred to attend a school within a reasonable driving distance.** In 2012, 44% of respondents sought an institution within just 50 miles of where they lived.<sup>14</sup> And this remains true in 2023, with 53% responding in kind.

In general, the growing number of online programs and providers has given learners more options over the past decade, narrowing students' radiuses as they're more likely to be familiar with and value local brands.

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

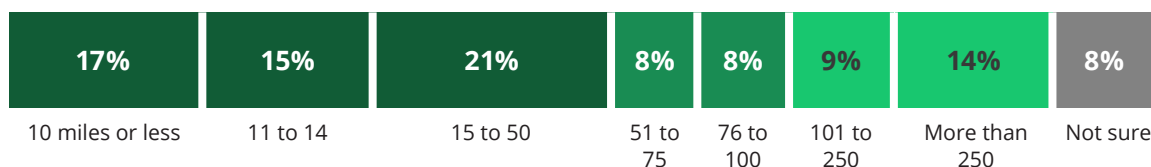
2012



2018



2023



<sup>13</sup> From our Online College Students 2018 report

<sup>14</sup> From our Online College Students 2012 report

Another motivating factor keeping online learning local? The value of visiting a physical campus location if needed. **Over one-third (38%) of respondents noted that being close to campus was important or very important to them.** For those students, reasons to visit the campus include connecting with an instructor (45%), attending a required on-campus class session (43%), or connecting with classmates (35%).

However, it's critical to note that being physically close to campus wasn't at all crucial to 34% of online learners. And 42% noted they wouldn't be open to visiting campus for an in-person class session. This highlights that a sizable group of learners prizes 100% online learning.

On the other hand, 40% are open to on-campus sessions once a week or once every other week per course. Nearly half (47%) of those receptive to on-campus sessions would prefer they occur on weekday evenings. Again, this reflects the flexibility students seek in their online programs.

---

### Why might you visit the campus?

Select top three. (N = 1,111)

---

To connect with professor(s)

45%

For a class session or other requirement of the program

43%

To connect with classmates/attend a study group/use the library

35%

For an optional session or other optional part of the program

34%

To access student services

29%

To attend your graduation ceremony

28%

To participate in a student activity

26%

Other

7%

*38% say it's important to visit their school's campus.*



#### RECOMMENDATION

### Consider adjusting program format to fit online learners' preferences.

Fewer than one in five learners seek a 16-week format for their online courses. So, it appears that the quicker, eight-week format has become the standard length for online higher education as it allows students to complete their degrees faster.

Over the past few years, with the influence of the COVID-19 pandemic and emergency remote learning, there's been a shift toward interest and acceptance of synchronous sessions in online programs. A synchronous session once a week or once every other week would be acceptable to two-thirds of respondents and could help with concerns around lack of faculty and peer interactions.

## Learners prefer on-campus laboratory courses

Laboratory courses are more commonly associated with engineering, nursing, and health fields. The COVID-19 pandemic seems to have accelerated demand in the already-growing nursing and public health occupations. Our [State of the Education Market 2023: Trends and Insights in Key Undergraduate Disciplines](#) revealed that the top two online undergraduate health programs are healthcare administration and registered nursing. In 2021, around half of both programs were offered online.

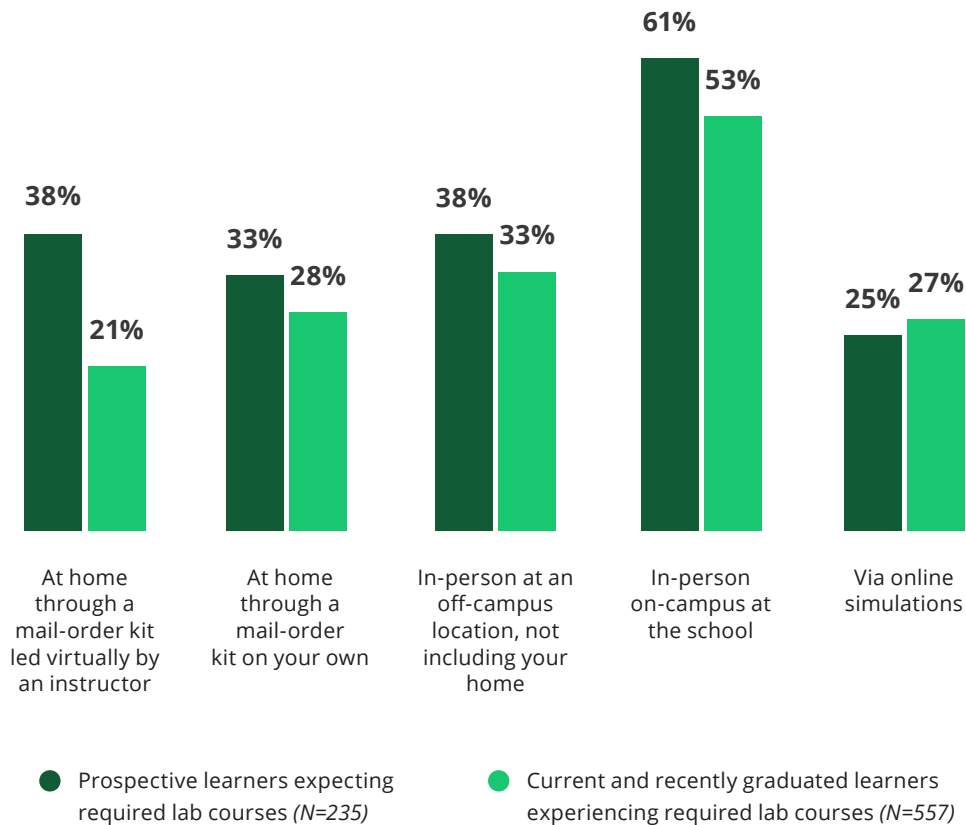
**This year, 30% of prospective learners believed they'd have laboratory courses in their programs.**

Prior to the pandemic, engineering wasn't often perceived as compatible with the online modality. But since then, institutions and instructors have adapted to meet the needs of online learners in programs with laboratory courses.

**Of the prospective learners who expected labs, 61% would prefer to take these courses in person and on campus.** Behind on-campus delivery, 38% would like to go to an off-campus location, 33% would like a mail-order kit, and 25% would like to complete online simulations. Current and recently graduated learners' actual experiences generally aligned with these preferences, though fewer completed their labs at home under virtual instruction.

Online learners who favor synchronous delivery would like to complete at-home labs on their own or led by an instructor. Students who favor asynchronous learning would prefer online simulations that can be completed on their own time.

## For your laboratory courses, how did/do you prefer to complete these courses?



## Students want to use mobile devices for course activities

Over the past decade, online learners have become more interested in using a mobile device (i.e., a smartphone or tablet, not a laptop) for course activities. **This year, 48% of prospective students reported wanting to complete most, if not all, of their course-related activities on a mobile device.** The same percentage of current and recently graduated online learners shared this preference, but only 38% said they were actually able to do so.

When they can use their mobile devices, learners complete various activities for their studies, and 56% find the process easy or very easy. Current students and recent graduates reported mainly using a mobile device to check grades or due dates (66%), followed by completing readings (45%), watching videos (45%), and communicating with their professors (45%). As a result, these data show that having a mobile-friendly LMS is a valuable way to offer learners more flexibility.

**During your online studies, did you use/would you want to use a mobile device for any of the following?**

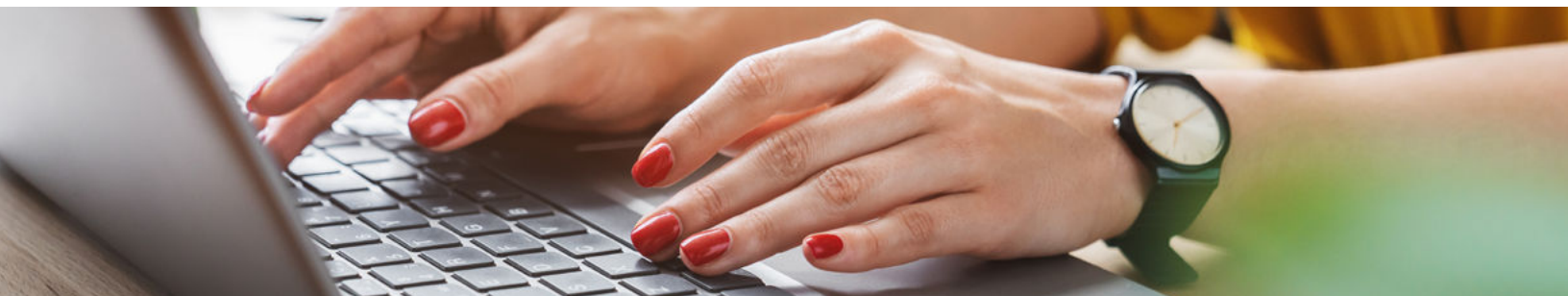
Select all that apply

	<b>Prospective learners who would like to use a mobile device</b> <i>(N = 655)</i>	<b>Current and recently graduated learners who used a mobile device</b> <i>(N = 1,253)</i>
Checking grades, due dates, or course schedules	<b>72%</b>	<b>66%</b>
Completing digital readings	<b>51%</b>	<b>45%</b>
Completing video or other multimedia learning	<b>56%</b>	<b>45%</b>
Communicating with professors	<b>56%</b>	<b>45%</b>
Communicating with other students	<b>52%</b>	<b>35%</b>
Researching additional information	<b>45%</b>	<b>32%</b>
Participating in a discussion	<b>42%</b>	<b>31%</b>
Completing practice activities	<b>44%</b>	<b>30%</b>
Completing graded activities	<b>35%</b>	<b>29%</b>



## NEXT STEPS:

# HOW TO SUPPORT ONLINE LEARNER GROWTH



Data from our survey reveal specific actions you can take to ensure your online programs meet learners' needs. These recommendations can help you adjust your online recruitment, enrollment, and retention strategies based on students' concerns, preferences, and behaviors. The related questions represent initial points of consideration rather than an exhaustive list.

### RECOMMENDATION

### Alleviate online learners' concerns throughout their journey.

#### Actions to take



Identify and remedy students' concerns about assembling the application and paying for their program. Learners can face difficulties during the admissions process, so removing hurdles where possible can enable them to take the next steps in their education.



Examine the entire student journey to determine and address points of friction or potential concerns. Look at processes, policies, and procedures from the learner's viewpoint and enhance their experience with new policies, such as expectations around classroom interactions.

#### Questions to consider



Do students receive support identifying aid and scholarships to assist with program costs?

Are three letters of recommendation necessary?

Is admissions testing necessary?



Are counselors ready to assist students?

Are the messaging and policies around classroom interactions and expectations clear to prospective and current learners?



## RECOMMENDATION

### Re-engage former stopouts as they return to higher education.

#### Actions to take



Reach out to non-completers. Nearly half of online learners identify as former stopouts returning to education. Online programs can expand access and offer these learners increased flexibility.



Provide extra assistance navigating the application and enrollment processes. Four in 10 former non-completers identify as first-generation higher education learners, so they may benefit from more support going through these processes. Admissions counselors can also help alleviate students' concerns by providing additional guidance around funding sources or procedures for taking a leave of absence.



Explore ways to provide former stopouts with support and attention during their learning journey. They previously left school, possibly due to financial difficulties or health troubles. During their studies, more check-ins with their academic advisors can help ensure they complete their degrees.

#### Questions to consider



Do you have promotional materials tailored to this group of learners' needs?

How does your messaging highlight what your institution provides regarding additional support?



Is your institution tracking formerly stopped out and first-generation learners to ensure they're receiving enough support?

Are counselors prepared to provide first-generation learners and former stopouts extra guidance during enrollment?

Is your leave of absence policy clear?



Are academic advisors ready to support students who need more attention during their studies?

How can you communicate this available support to alleviate prospective learners' potential concerns?



## RECOMMENDATION

### Remove barriers for alumni to return to school.

#### Actions to take



Engage alumni to return to your institution with advanced standing or a free course. Appealing to online learners' interests in certificates could motivate alumni to add to their credentials.



Be proactive about connecting with employers. When multiple alumni work at the same company, this presents an opportunity to develop a relationship with their employer. Moreover, offering financial support through a tuition discount can generate further interest among alumni.

#### Questions to consider



How is your institution consistently engaging with alumni?

How are you communicating about additional learning opportunities?



Have you established a relationship with companies employing groups of alumni?

Do your employer partners provide employees with clear guidance on utilizing tuition reimbursement benefits?

## RECOMMENDATION

### Identify ideal areas for innovation and consistency.

#### Actions to take



Don't hesitate to innovate your educational options. The degree remains relevant and is still perceived as important to a graduate's career success. But online learners are interested in degree alternatives and certificate options, even if they can't receive financial aid. In *Closing the Skills Gap 2023*, employers noted degree alternatives are also valuable to qualify job candidates.



Make changes to degree coursework but only where relevant. Students are open to some adjustments, such as occasional synchronous sessions, which can help them potentially better understand complex coursework and receive answers to their questions in real time. However, innovative efforts shouldn't tread on best practices for online programs already meeting learners' needs, such as eight-week course lengths, the ability to take more than one course at a time, and no requirements to visit campus.

#### Questions to consider



Does your institution have existing online programs you could break down into a series of certificates that lead to a degree? Could those certificates be broken down into non-credit options or other alternatives (e.g., badges) for the major skills taught?

Are these alternatives priced cost-effectively since federal aid may not be available to help students pay for them?



Are "best practices" working for learners at your institution?

Where could making changes better serve learners' needs, such as occasional synchronous sessions?

---

# METHODOLOGY

In the spring of 2023, Wiley University Services received survey responses from more than 2,600 individuals across the US. Respondents were at least 18 years of age, had a minimum educational credential of a high school degree or equivalent, and were recently graduated (within 12 months), currently enrolled, or planned to enroll (within 12 months) in a fully online undergraduate or graduate degree or certificate program.

Graduate students represented 17% of the total college population in the fall of 2021 but 23% of the online population.<sup>15</sup> The sample for this survey was weighted to make up approximately 60% graduate students, ensuring a large enough sample for meaningful conclusions for this segment of the online learning market. We combined undergraduate and graduate data unless there were noteworthy differences.

The sample consisted of 2,610 respondents comprised of a national external panel of 1,510 responses and an internal survey of 1,100 prospective, current, and recently graduated students enrolled at Wiley client institutions.

## Technical Notes

All percentages in this report have been rounded. Therefore, the total percent figure in a table may not add up to exactly 100. Further, if the total percentage is substantially more than 100, it's because the question allowed respondents to choose more than one option. All questions were answered by the full sample of 2,610 respondents unless noted otherwise.

## Access more insights about online learning

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

To recruit for the external sample, a panel of consumers from across the US was asked to participate in an online survey through custom email invitations. Invitations were sent randomly across the country to reflect the basic population distribution, targeting persons 18 or older. Panelists were then allowed to participate in the study if they'd 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'd requested information from, applied to, enrolled in, or graduated from a Wiley client institution was invited to participate in an online survey through custom email invitations. The same parameters were used to qualify for the survey as the external sample.

In 2021, 5.66 million higher education students were enrolled in courses exclusively delivered via distance education.<sup>16</sup> Based on these findings, a sample of 2,610 represents an approximate sampling error of +/-1.92% at a 95% confidence level.

<sup>15</sup> From National Center for Education Statistics' 2021 report

<sup>16</sup> Ibid

# REFERENCES

Aslanian, C. B., & Clinefelter, D. L. (2012). *Online college students 2012: Comprehensive data on demands and preferences*. Louisville, KY: The Learning House, Inc.

Beresford Research. (2023). Age Range by Generation. Retrieved from <https://www.beresfordresearch.com/age-range-by-generation/>.

Capranos, D., Dyers, L., Magda, A. J. (2021). *Voice of the online learner 2021: Amplifying student voices in extraordinary times*. Louisville, KY: Wiley Education Services.

Capranos, D., Dyers, L., Magda, A. J. (2022). *Voice of the online learner 2022: Shifting preferences in post-pandemic online learning*. Maitland, FL: Wiley University Services.

Capranos, D., Magda, A. J. (2023). *Closing the skills gap 2023: Employer perspectives on educating the postpandemic workforce*. Maitland, FL: Wiley Inc.

Education Data Initiative. (2022). College Dropout Rates. Retrieved from <https://educationdata.org/college-dropout-rates>.

Magda, A. J., & Aslanian, C. B. (2018). *Online college students 2018: Comprehensive data on demands and preferences*. Louisville, KY: The Learning House, Inc.

National Association of College and University Business Officers. (2022). *2021 Tuition Discounting Study*. Retrieved from <https://www.nacubo.org/Press-Releases/2022/Tuition-Discount-Rates-at-Private-Colleges-and-Universities-Hit-All-Time-Highs>.

National Center for Education Statistics. (2021). IPEDS [Data sets]. Retrieved from <https://nces.ed.gov/IPEDS/>.

National Student Clearinghouse Research Center. (2023). Stay Informed with the Latest Enrollment Information. Retrieved from <https://nscresearchcenter.org/stay-informed/>.

Wright, L., Capranos, D., Dyers, L., & Magda, A. J. (2022). *Online learner experiences: The importance of cohesive design and learning communities to student satisfaction*. Maitland, FL: Wiley Inc.





---

## ABOUT US

### Wiley

Wiley is one of the world's largest publishers and a global leader in scientific research and career-connected education. Founded in 1807, Wiley enables discovery, powers education, and shapes workforces. Through its industry-leading content, digital platforms, and knowledge networks, the company delivers on its timeless mission to unlock human potential. Visit us at [Wiley.com](https://www.wiley.com).

### Wiley University Services

Wiley University Services is a career-connected education provider that works with higher ed institutions to meet learners' needs and unlock human potential. We partner with over 70 colleges and universities around the globe to help their learners earn their degrees, advance their skills, and reach their career goals. To learn more about our flexible products and services, visit [universityservices.wiley.com](https://universityservices.wiley.com).

---

# AUTHORS

**David Capranos** is a director responsible for market strategy and research at Wiley within University Services. In managing the market research team, David conducts extensive research to identify market opportunities, reveal potential challenges, and highlight academic programs that align with current demand. His team plays a vital role in determining the viability of educational programs in the online market and helping universities stay ahead of industry and market trends. David has a background as a business analyst in higher education marketing, evaluating marketing tactics and helping implement technologies, such as student relationship management and project management systems. Born in Toronto, Canada, David received his BBA from the University of Central Florida and his MBA from the University of Scranton.

**Loralee Dyers** manages market strategy and research at Wiley, leading a team of analysts to provide in-depth market research for prospective and current university partners. She is passionate about using data to understand and inform decision-making. Through this work, she provides actionable insights for determining the viability, marketability, and design of higher education programs. Before joining Wiley, Lorelee spent over a decade as a litigation consultant, designing and conducting primary litigation research for Fortune 500 companies. After receiving her BA in Psychology from the University of Southern California and an MA in Forensic Psychology, she pivoted her focus to data, completing a certificate in Data Analytics from Cornell University and an MS in Data Science.

**Andrew J. Magda, EdD** is a manager of market strategy and research at Wiley, supporting University Services. He leads the development of custom and large-scale market research studies and assists partner institutions with their research needs. Andrew has tracked and forecasted trends in online education for more than 15 years, helping hundreds of institutions determine their unique place in the online marketplace. Prior to Wiley, Andrew was a senior analyst at Eduventures and a project manager at the Center for Survey Research and Analysis at the University of Connecticut. He holds a BA in Political Science with an emphasis in survey research from Marist College and an MA in Survey Research from the University of Connecticut. He has also completed his EdD in Educational Leadership from Concordia University, St. Paul.

*For additional information about this report or Wiley University Services, contact [universitieservices@wiley.com](mailto:universitieservices@wiley.com)*