

2015



# Online College Students

Comprehensive Data on Demands and Preferences



# Online College Students 2015:

## Comprehensive Data on Demands and Preferences

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

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## Introduction

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This report presents findings from the fourth annual survey of online college students, conducted jointly by The Learning House, Inc. and Aslanian Market Research. Every year, these organizations conduct a survey of students who are considering a fully online program, those who are currently enrolled in a fully online college program, and those who have graduated within the past year. It is our goal to profile who is studying online, and why, as well as provide institutions with key takeaways to help them better serve this unique population.

Some of the questions are repeated each year; for those questions, any emerging trends are noted. Some questions, however, are new to this year's survey. To access the 2012, 2013 and 2014 reports, visit [learninghouse.com/resources/research](http://learninghouse.com/resources/research) or [aslanianmarketresearch.com/resources/white-papers](http://aslanianmarketresearch.com/resources/white-papers).

These data reveal both bad news and good news about the current state of online higher education. The bad news is that the overall college population has shrunk in recent years. Given the declining national unemployment rate and the rebounding economy, more people are choosing to remain at their jobs than to pursue further education. Data from the National Student Clearinghouse Research Center (2015) show that college enrollments declined by close to 2%, yielding 18.6 million college students today. About 5.5 million of these students are studying partially or fully online. At the same time, competition for these online students is increasing. Between 2012 and 2013, 421 institutions launched online programs for the first time, an increase of 23% to 2,250 institutions.

The good news is that online degrees continue to gain acceptance among prospective students because these degrees provide flexibility and access to highly valued credentials. Online enrollment is expanding by about 1% per year. Several factors point to increased potential for online providers.

1. Nearly 60% of the jobs available require some postsecondary education (National Student Clearinghouse Research Center, 2015).
2. Frequent career changes over a lifetime make continuing education a necessity (National Student Clearinghouse Research Center, 2015).
3. Over the past 20 years, more than 31 million students have enrolled in college but left without receiving a degree or certificate (Shapiro et al., 2014).
4. There are about 111 million adults in the United States with no college degree, and most people aspire to earn a postsecondary credential but view cost as the biggest barrier (Kelly, 2015).

This report summarizes trends in the online student experience, from recruitment to graduation, and provides insights on how to attract and serve these students. For example, students express a strong preference for self-paced programs, but few are offered. Reputation is important in selecting a college, but students don't have a good way to assess it aside from accreditation. Online students believe the value of their experience is equal to or better than that of on-campus classes, but they have a number of concerns that can and should be addressed.

We hope this information is useful to online leaders in expanding access to and improving the quality of their programs.

## Key Findings and Observations

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In the spring of 2015, Learning House and Aslanian Market Research conducted a survey of 1,500 individuals nationwide who were: at least 18 years of age; had a minimum of a high school degree or equivalent; and were recently enrolled, currently enrolled or planning to enroll in the next 12 months in either a fully online undergraduate or graduate degree program or a fully online certificate or licensure program.

The patterns and preferences of the sample of individuals interviewed are reflective of online students as a whole, and the data reflect a national template of the behavior and preferences of these students. College and university leaders can use this information to attract and serve this growing population. Individual institutions should also consider regional data and their positioning in the local marketplace.

Throughout this report, the trends noted reflect aggregated data, comprising both undergraduate and graduate online student responses. If noteworthy differences between undergraduate and graduate students exist, the report calls attention to these differences.

Within the report, there are many recommendations for online programs based on survey findings and our collective experience. These recommendations are presented in **red**, italicized text at the end of selected sections.

Below are the key findings and observations of this report.

- 1. Nothing surpasses career preparation as a motivator in attracting students to higher education, and online learning is no exception.** Roughly 75% of online students seek further education to change careers, get a job, earn a promotion or keep up to date with their skills. The third most appealing marketing message among the group sampled was “a high job placement rate.” Colleges that want to excel in attracting prospective online students must prepare them for and connect them to the world of work.
- 2. Online students are diverse in their preferences, so there is no one-size-fits-all strategy to serve them.** The preferences of online college students are often contradictory, so decision-makers need to consider and pursue a variety of strategies to reach the maximum amount of this population. For example, consider the response to this question: “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?” Twenty-one percent responded “never,” but 15% responded “more than five times per course.” When asked if they preferred paper or electronic textbooks, 43% preferred electronic, 33% preferred paper and 23% didn’t have a preference.

- 3. As competition for students stiffens, online students expect policies and processes tailored to their needs.** These include shorter academic terms (five to eight weeks); generous credit transfer policies; informative websites; and speedy response times on admission decisions, transfer credit reviews and financial aid packaging. These online student-friendly practices are becoming minimum requirements for institutions that want to thrive in this arena. For example, the amount of transfer credit accepted has consistently been ranked one of the top 10 factors in selecting an institution in our surveys, and one-quarter of students reported receiving that information prior to submitting their application.
- 4. In online education, everything is local.** Half of online students live within 50 miles of their campus, and 65% live within 100 miles. Even though these students rarely, if ever, visit the campus, it is nearby. Thirty-four percent of respondents reported that the recommendation of friends, colleagues and relatives was an important factor in deciding if a college had a good reputation. Online students were asked, "After identifying institutions of interest, what were your primary methods of gathering detailed information?" Twenty-four percent reported attending an open house, 31% had conversations with friends and family, and 21% had conversations with their employers or colleagues. Online students typically attend a local institution and rely on local sources for information.
- 5. The college or university website is a critical source of information.** It is likely that a significant percentage of students base their decision solely on information from the website, without ever speaking with someone from the institution. Sixteen percent of respondents reported having no contact with personnel at the institution prior to applying. The website is prospective students' top method of gathering information about a program. Forty-nine percent reported turning directly to the college website when they were asked, "What were your primary methods of gathering detailed information?" Similarly, 43% of students reported using the website to request more information about their program of interest. Twenty-nine percent sent an email for more information, and 28% called the institution. Additionally, respondents reported that they selected an institution based on a variety of information such as tuition, admission requirements and available programs, all of which should be available on a college's website.
- 6. Affordability is a critical variable.** Forty-five percent of respondents to the 2015 survey reported that they selected the most inexpensive institution. In 2014, 30% reported selecting the most inexpensive institution. Thus, it is not surprising that among 23 potential marketing messages, the most appealing were "Affordable tuition" and "Free textbooks."

- 7. Although a good number of students are committed to online education, they see room for improvement.** Only 10% of respondents thought online instruction was not as good as their in-class instruction. But when asked about their concerns with online instruction, 21% reported “Inconsistent/poor contact and communication with instructors,” and 17% reported “Inconsistent/poor quality of instruction.” When respondents were asked if they would prefer online tutorials, independent study or instructor-led classes, only about one-third favored instructor-led online classes, which is far and away the predominant format offered currently. One-third would like a faculty member as their advisor, which is currently not a common practice. About half would find optional internships and on-campus courses attractive, but they are not typically offered.
- 8. A large segment of college graduates will never set foot in a college classroom.** When asked if they would attend on-campus classes if their program was not available online, about 30% said they probably or definitely would not. About one-quarter said they probably or definitely would not attend a hybrid or low-residency program. Just like some people no longer go to theaters, banks or grocery stores, some people prefer to get their education via the Internet. Advances in technology, such as mobile apps and adaptive learning systems, will continue to make it easier for these people and others to go to college online.
- 9. Blended programs hold promise.** Although some students prefer never going to campus and never participating in synchronous online learning activities, a significant percentage is interested in on-campus activities, classes and internships. About half of the respondents indicated they would attend a hybrid or low-residency option if their program was not available fully online. Twenty-two percent indicated “One or more optional on-campus courses” was very attractive. A small number of colleges and universities have integrated their online and campus programs so that most programs are offered in both formats, most faculty teach in both formats, and most students enroll in both formats. These institutions are in a strong position to meet student needs and preferences.
- 10. Much of online higher education is highly commoditized.** There are several popular degrees offered by many institutions. Thirty percent of online students are enrolled in three majors: business administration, nursing and computer science. Most universities use one of three or four learning management systems that have similar features. The same marketing messages of convenience and flexibility are used throughout the industry. Many institutions even use the same adjunct faculty members to teach their courses. The data in this report indicate that substantial numbers of students are interested in features that institutions could use to distinguish themselves, such as price, self-study options, faculty advisors or job placement rates.
- 11. Online study leads to online study.** The majority of current online students have past experience with studying online. They know what it is, and they choose it among many other alternatives. They are savvy buyers. In fact, one indication of students’ increased familiarity and comfort with online education is the increased use of the modality at the high school level.



**12. The program or major drives the selection process.** Sixty percent of respondents indicated they selected their program of study first and then considered institutions. One-third responded that the critical factor was “The program was the best match,” which was significantly more important than price or reputation.

**13. Online students “pre-select” their preferred institution of study.** One-third contacted only one institution when deciding to pursue their education online. Colleges and universities must pay careful attention to these students in order to cultivate them successfully to enrollment. It is critical that institutions have a strong local brand so that they are at the top of students’ minds when they begin to search for a program of study.

**14. Age no longer predicts learning behavior in online higher education.** While online education has traditionally been marketed toward adult learners, more and more students under 25 years of age are choosing to study online for their undergraduate degrees.

## Student Learning Preferences

### Primary Motivation

Most of the respondents reported that they were motivated to pursue further education because they desired to change their professional status either by starting a new career or getting a new job or promotion. Over one in five were motivated by the prospect of gaining a sense of self-satisfaction by completing their degree. Graduate students were more motivated than undergraduate students by the ability to seek a promotion and keep their skills up to date.

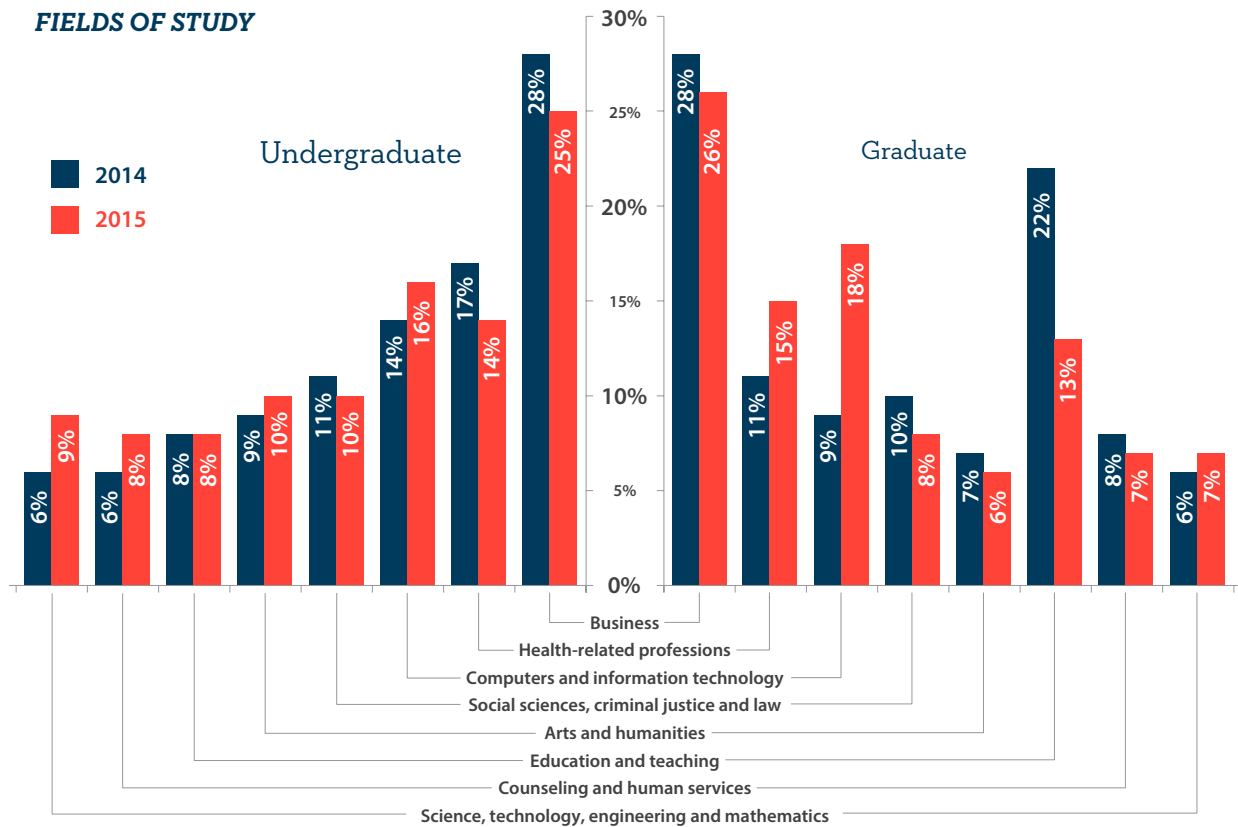
<b><i>What was your primary motivation for enrolling in further education?</i></b>	<b>Percent of Respondents</b>		
	<b>All</b>	<b>Undergraduate</b>	<b>Graduate</b>
I wanted a career in a new field	22%	23%	22%
The satisfaction of completing my undergraduate/graduate education	21	24	17
I was unemployed/underemployed and needed more education to get a new job	14	16	10
I was seeking a promotion/new position in my field	13	8	19
I wanted to keep up to date with the skills and requirements of my current job	10	7	13
It was a requirement by my employer/profession	9	9	10
I was reentering the job market and needed more education	7	7	8
I had just finished high school/GED	2	4	0
Other personal reasons not related to career	2	2	1

### Fields of Study

Business continues to be the most popular online education vertical for both undergraduate and graduate students. The majority of online business students were in business administration programs. At the graduate level, nearly nine in 10 business students were in MBA programs. Almost half of online business students were not sure if their program holds special accreditation from organizations such as AACSB. However, for those who knew that their program did hold such accreditation, this was a strong, driving factor in their selection of a program.

Undergraduate fields of study preferences remained consistent with previous years' responses. The fields of study among graduate students shifted, with education experiencing a nine-percentage-point decline, and computers and information technology (CIT) witnessing a nine-percentage-point increase. Health-related professions grew by four percentage points. A shift of approximately 10% is statistically significant.

## FIELDS OF STUDY



## Top 15 Majors

Business administration was by far the most popular undergraduate major, with almost four times more students selecting it than nursing, the next most popular field of study. When combined, the number of students in computer science and engineering and information technology surpassed the numbers for nursing. After that, there was little difference in the rankings of the remaining majors.

<i>Top Undergraduate Majors</i>	<i>Percent of Respondents</i>
Business administration	19.8%
Nursing	5.2
Computer science and engineering	3.9
Information technology	3.6
Engineering	2.2
Sociology	2.2
Networks, computer networking	2.1
Elementary education	2.1
Social work	1.9
Criminal justice	1.9
Accounting	1.8
Counseling psychology, psychotherapy	1.8
Early childhood education	1.8
Computer security, cybersecurity	1.6
Psychology	1.6

Similar to undergraduates, four times as many graduate students studied business administration as nursing, the next most popular field of study. The combined interest in computer science and technology was similar to that of nursing. There was little difference in demand for the remaining programs.

<b>Top Graduate Majors</b>	<b>Percent of Respondents</b>
Business administration	22.0%
Nursing	5.5
Computer science and engineering	3.0
Information technology	2.8
Early childhood education	2.5
Counseling psychology, psychotherapy	2.3
Computer security, cybersecurity	2.1
Networks, computer networking	1.9
Technology management	1.9
Social work	1.7
Elementary education	1.7
Engineering	1.7
Software engineering	1.5
Secondary education	1.5
Other	2.1

**Three percent of respondents were enrolled at the doctoral level. For institutions that offer master's degrees, a productive growth strategy would be to move toward offering doctoral programs in the disciplines that have strong reputations and strong faculty members.**

## Past Online Experience

Nearly 60% of all online students entered their current program with past online education experiences, whether they had taken individual online courses or had completed a full degree. This was true for both undergraduate and graduate students, although graduate students were more likely to have completed a degree online prior to entering their current graduate program. There were no significant changes over the four years of research in the percentage of individuals with prior online experience.

<b><i>Prior to your recent online study, had you ever enrolled in any other fully online courses or programs?</i></b>	<b>Percent of Respondents</b>		
	<b>2013</b>	<b>2014</b>	<b>2015</b>
Yes, I took individual online courses	44%	45%	48%
Yes, I completed another fully online program	11	17	11
No	45	43	43

*To locate prospective students, it is best to do so from the pool of students who have taken online courses and programs.*

## Comparing Online Experience to Classroom Experience

Students were asked to compare the online learning experience to the traditional classroom experience. Seventy-eight percent of sampled students indicated that their online experience was better than or about the same as classroom instruction.

<b><i>How would you compare the academic quality of your online learning experiences with your classroom experiences?</i></b>	<b>Percent of Respondents</b>
Better	32%
About the same	46
Not as good	10
I have not yet enrolled in any online study	11

## Consideration of Classroom Programs

Online students were not necessarily drawn to the classroom, even if the option was available. One-third of all online students definitely or probably would not enroll in a classroom program and nearly as many were not sure whether they would enroll in a classroom program if their desired program was not available in an online format.

<b><i>If the program you wanted was not available in an online format, how likely is it that you would have enrolled in a classroom program?</i></b>	<b>Percent of Respondents</b>
1 – Definitely not	12%
2 – Probably not	21
3 – Not sure	28
4 – Probably would	25
5 – Definitely would	14
<b>Mean score</b>	<b>3.08</b>

## Consideration of Hybrid or Low-Residency Programs

If their program was not available fully online, nearly one-quarter (23%) of online students definitely or probably would not have pursued the degree in a low-residency format. Additionally, one-quarter of students were not sure if they would. This group would represent nearly 600,000 students nationwide who would not be enrolled in higher education if it were not for online programs. In addition, online students are becoming more willing than they were two years ago to consider hybrid options, if they are available.

<b><i>If the program you wanted was not available in an online format, how likely is it that you would have enrolled in a hybrid/low-residency program?</i></b>	<b>2014</b>	<b>2015*</b>
1 – Definitely not	12%	9%
2 – Probably not	18	14
3 – Not sure	40	25
4 – Probably would	22	38
5 – Definitely would	8	15
<b>Mean score</b>	<b>2.97</b>	<b>3.36</b>

*\*Note: The question changed in 2015 from hybrid/low-residency to partially online, so comparisons are not exact.*

***Regional institutions have an opportunity to compete well in their area market of prospective students given students' preferences for nearby providers.***

## Concerns With Online Learning

A near equal number of online students were concerned with their ability to self-motivate during their online studies (27%), perceptions about the quality of online study (27%), and the cost of online study (26%).

<b><i>What are your continuing concerns with online learning?</i></b>	<b>Percent of Respondents</b>
Motivation/attention/focus challenges	27%
Perceptions of quality of online study	27
Cost	26
Inconsistent/poor contact and communication with instructors	21
Lack of direct contact with other students	17
Inconsistent/poor quality of instruction	17
The need for costly technology (high-speed Internet, computers, etc.)	16
More difficult than classroom	13
Takes longer to complete	12
Other	2

*Colleges can address a number of student concerns, such as inconsistent communication with instructors, lack of direct contact with other students and inconsistent quality of instruction, through faculty training as well as course design standards and processes.*

## Full- and Part-Time Enrollment

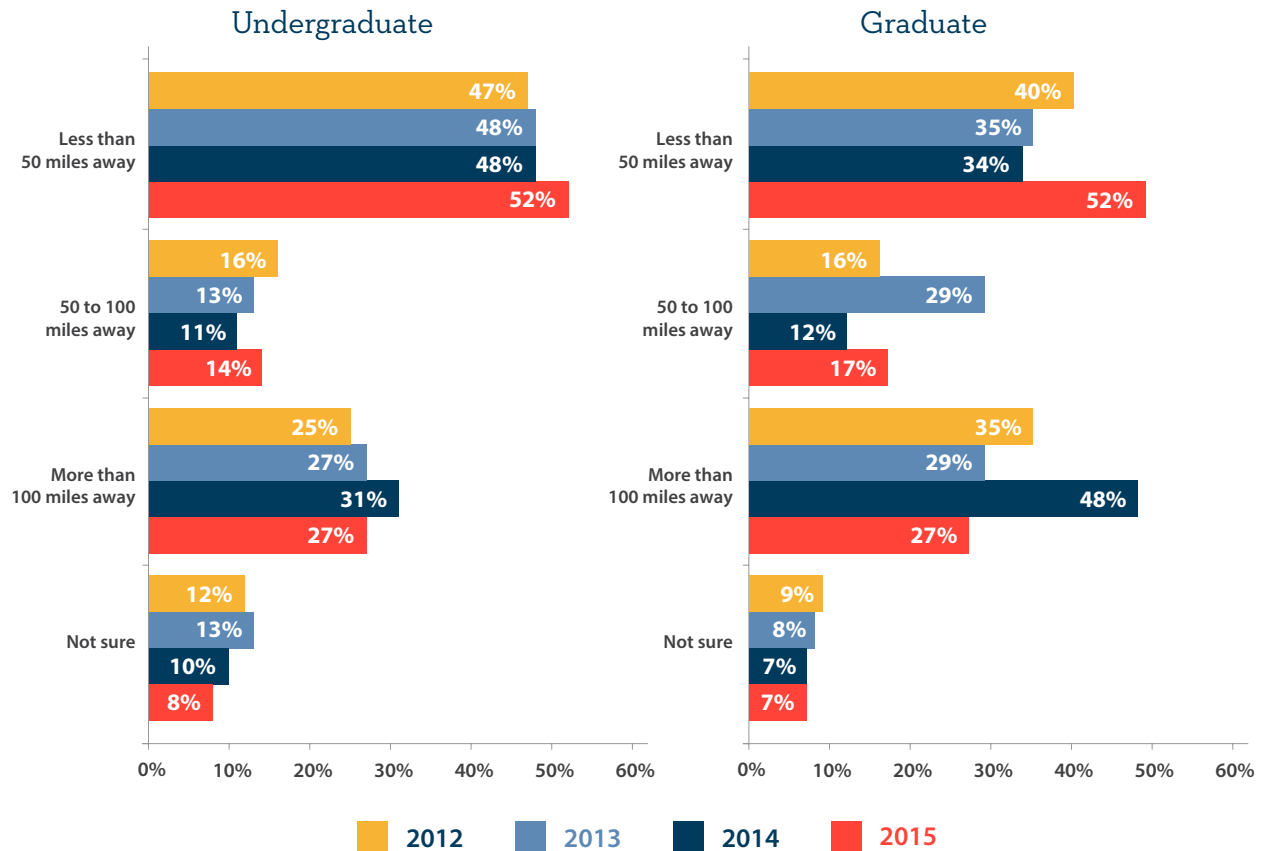
After years of a strong trend toward online students being enrolled full-time, the number declined slightly in 2015.

<b><i>Were you enrolled full-time or part-time?</i></b>	<b>Percent of Respondents</b>			
	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Full-time	50%	56%	65%	61%
Part-time	51	44	35	39

# College and University Attributes

## Student Proximity to Institution

At the undergraduate level, about half of the students selected an institution within 50 miles of their residence. There was a three-year trend of graduate-level students enrolling farther from home, but that was reversed in the data this year.





## Important Factors in Selecting a Program

"Tuition and fees" was the most cited reason for selecting an online program. But a number of other factors were identified almost as frequently, such as reputation, the institution being recognized as high quality, the number of hours required for study each week and no set class meeting time. These combined factors show that cost (both time and money) was weighed almost as heavily as the perceived reputation and quality of the institution.

After two years of being the top factor when selecting a program, reputation slipped to the second most important factor.

<b><i>Which of the following factors specifically related to your field of study were important in your selection of an online program? (Select up to three)</i></b>	<b>Percent of Respondents</b>		
	<b>2013</b>	<b>2014</b>	<b>2015</b>
Tuition and fees	35%	24%	23%
Overall reputation of the college or university	44	25	18
Recognized in your field as a high-quality college or university	27	14	17
Number of hours of study required each week	NA	NA	16
No set class meeting times	38	19	16
Amount of transfer credits accepted	32	9	13
Availability of courses that teach workplace skills such as problem-solving, critical thinking and teamwork	28	10	13
Successful career placement of graduates	NA	NA	12
Students never have to visit campus during their study	25	13	12
Availability of credit earned by examination or professional/life experience	NA	6	12
Simplicity of admissions process	20	10	11
Positive interactions with admissions/enrollment personnel	NA	NA	10
Documented student learning outcomes	NA	8	9
Graduation rates	NA	7	9
Having a personal academic advisor who contacts me regularly	31	11	8
Faculty that teach part-time and are practitioners in their field	17	7	8
Free books and materials	NA	NA	8
Recommendation of a friend/family member	18	12	7
Class sessions with set login times providing facilitated group interaction	20	7	6
Faculty that teach full-time and hold a doctorate	19	7	6
Positive interactions with financial aid personnel	17	10	6
Strong ties with employers	NA	NA	6
Known to be a rigorous program	14	5	5
Availability of "brush up" basic writing, math and reading courses	16	4	4

*Note: The answer choices available across the years varied. Choices not available in 2013 and 2014 are notated with NA in the table above.*

## Importance of College Reputation

Given the importance of an institution's reputation in the college selection process and the myriad tools available to measure quality in the online market, students were asked a follow-up question to gain further understanding of how students assess quality. The overwhelming majority equated quality with institutional accreditation (63%). *U.S. News and World Report* publishes online program rankings, but just 20% of online students cited these rankings as a measure of reputation. Being viewed as high quality by employers, family or friends is a more salient influencer of reputation than these national rankings.

As a measure of quality, accreditation has declined by 10 percentage points. However, it still remains the top factor students use to measure an institution's reputation. Recommendations from friends, colleagues and relatives increased by nine percentage points from 2014.

<b>What factors are important to you in deciding if a college or university has a good reputation? (Select up to three)</b>	<b>Percent of Respondents</b>	
	<b>2014</b>	<b>2015</b>
It is accredited	73%	63%
Recognized in my field as a high-quality institution	35	35
Recommendations of friends, colleagues and relatives	25	34
It has high academic standards	20	23
It holds a high ranking in the <i>U.S. News and World Report</i> annual ranking	22	20
Strong ties with employers	11	16
Classes are demanding and difficult	12	15
Accomplishments of its alumni	15	14
Faculty who are full-time, tenured, who hold doctorates	14	14
It has a campus	9	10
It has high tuition	5	8
Faculty are part-time practitioners	4	5
Other	1	1

***Beyond accreditation, students don't have an objective way to assess reputation or quality. This offers online leaders the opportunity to define the quality of their institution and craft appropriate messages for prospective students. One possible way to define institutional quality is by advertising program outcomes, such as placement rates and graduation rates, learning and curricular outcomes, exemplary service, and faculty and instructional quality.***

## Preference of Not-For-Profit or For-Profit

It doesn't matter to most students (62%) if an institution is not-for-profit or for-profit.

<b><i>Does it matter that the institution in which you enroll is not-for-profit or for-profit?</i></b>	<b>Percent of Respondents</b>
Yes	21%
No	62
Don't know the difference	16

*Clearly, while for-profit providers have lost market share in recent years, this is likely due to factors other than their for-profit status, such as cost.*

# Recruiting Online Students

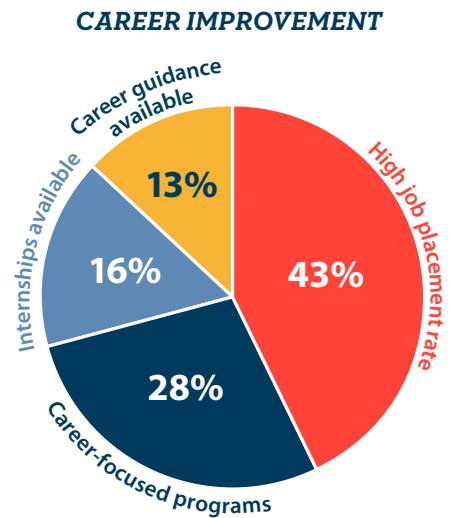
## Most Effective Marketing Messages: Category

Respondents were presented with marketing messages that had been broken down into seven topical categories and asked to choose which message among each of the categories they found most appealing. The categories were designed to allow leaders to identify effective messaging that corresponds to the specific strengths of their institutions.

### Career Improvement

In the area of career improvement, “High job placement rate” was the most appealing message of the four listed. A distant second was offering “Career-focused programs” (28%), followed by “Internships available” (16%) and “Career guidance available” (13%).

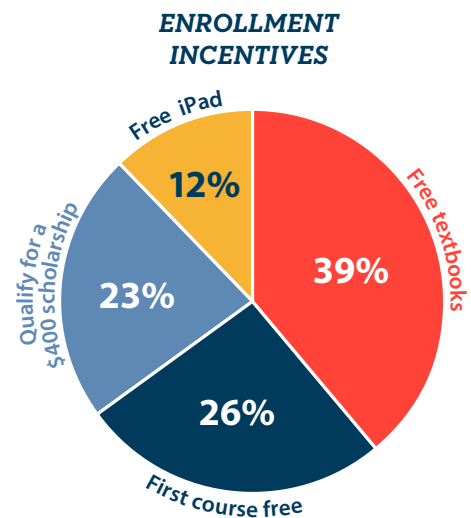
*Unsurprisingly, job placement is a highly attractive feature for any institution to advertise, given online students’ motivation to enroll at both the undergraduate and graduate levels in programs that will help them move forward in their careers. As much as possible, colleges that want to attract online students must demonstrate how they connect their graduates to the world of employment.*



### Enrollment Incentives

While messages of scholarships, first courses free or even free iPads are often seen in today’s marketing as a financial incentive for students to enroll, students know that it’s the textbook cost that often presents the biggest up-front financial burden and the one about which they are most concerned.

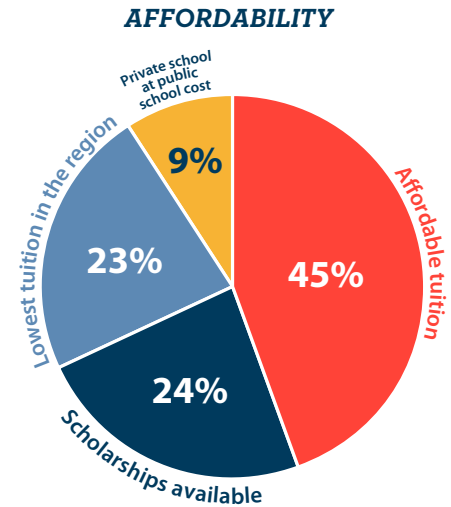
*Colleges should begin to make efforts for highly discounted or free course materials whether in electronic or print format and then use those advancements in marketing efforts.*



## Affordability

Students were given four marketing messages regarding affordability. The straightforward message of “Affordable tuition” was seen as the most appealing, with 45% of students choosing this message, compared to 24% choosing “Scholarships available.”

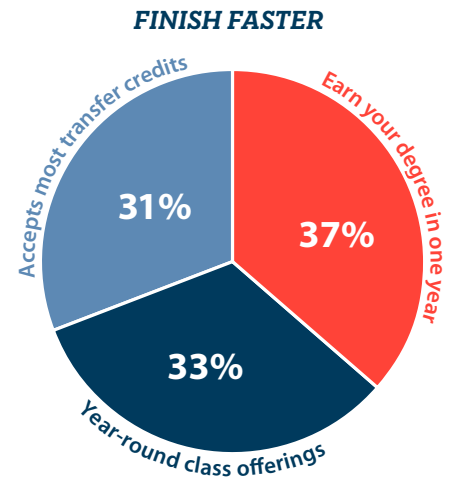
*Cost is extremely important to potential college students. The more an institution can do to describe its current tuition as both affordable and competitive, the greater its appeal to prospective students. Advertising must emphasize financial factors, and specify why financing an online education will not be a burden.*



## Finish Faster

Students were less decisive when asked about marketing messages that focused on completing their degree faster. Among graduate students, “Earn your degree in one year” was slightly more appealing than “Year-round class offerings” (34%) and “Accepts more transfer credits” (25%).

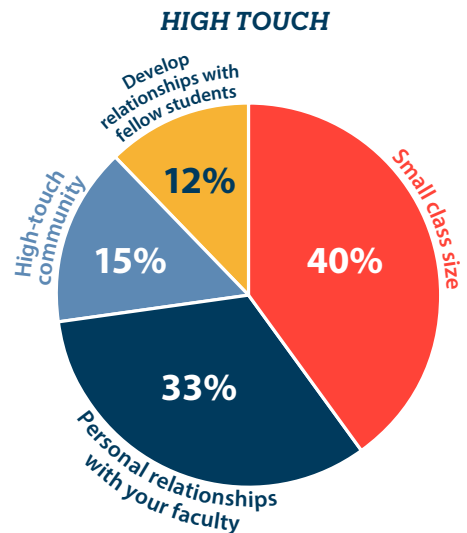
*Completion time has always been, and continues to be, an important factor among online students. They need to see “the light at the end of the tunnel.” Thus, transfer credits and year-round instruction resonate well with prospective online students who hope to earn their degree as quickly as possible.*



## High Touch

Students were more likely to respond to marketing messages that discussed small class size (40%) and personal relationships with faculty members (33%) than those about a high-touch community (15%) or developing relationships with fellow students (12%).

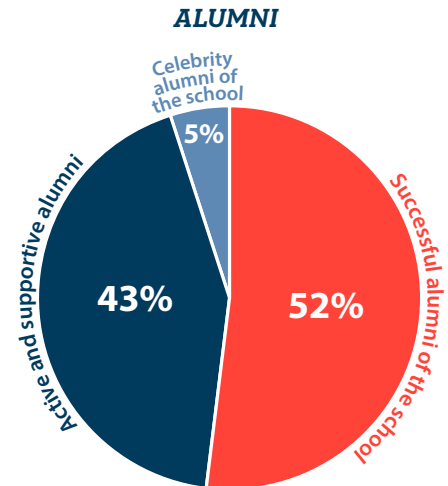
*These responses should guide colleges to emphasize (when appropriate) that online classes can be intimate and do indeed allow students to foster ties with faculty members.*



## Alumni Success

Online students were much more interested in hearing about successful alumni (52%) than about celebrity alumni (5%) at an institution. Active and supportive alumni (43%) were also seen as being more appealing compared to celebrity alumni. Graduate students found messages about successful alumni more appealing than those about supportive alumni.

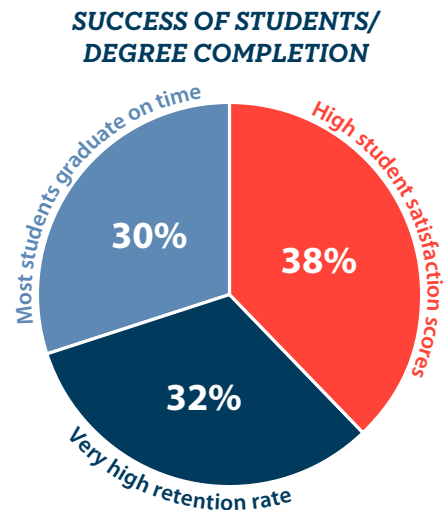
*While some for-profit institutions have aligned with celebrity alumni, it does not seem to resonate well with prospective online students.*



## Success of Students

When institutions want to demonstrate the success of their students, prospects find satisfaction scores slightly more appealing than other messages. Not far behind, however, were messages on high retention rates (32%) and timely student completion (30%). Given similar ratings across all three factors, colleges would be wise to describe their performance in all three areas.

*If your institution regularly conducts student satisfaction surveys and the results are favorable, consider adding this information in marketing materials.*



## Most Effective Marketing Messages: Overall

After ranking marketing messages across categories, respondents were then given the entire list of potential marketing messages and asked to select the three most appealing. Online students rated “Affordable tuition” (36%) as the top overall message of the 25 messages they viewed, followed by “Free textbooks” (31%) and “High job placement rates” (27%). Responses showed that, of the seven categories, messages about affordability, enrollment incentives and career improvement were the areas with the most appeal.

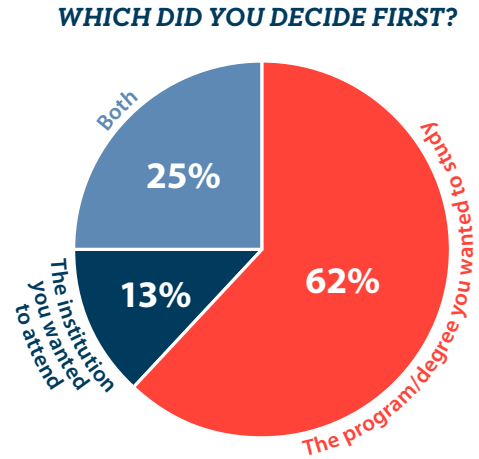
<b><i>Which three of these marketing messages are the most appealing to you?</i></b>	<b>Percent of Respondents</b>
Affordable tuition	36%
Free textbooks	31
High job placement rate	27
Earn your degree in one year	21
First course free	19
Lowest tuition in the region	17
Accepts most transfer credits	17
Scholarships available	16
Qualify for a \$400 scholarship	15
Career-focused programs	13
Year-round class offerings	12
Internships available	10
Free iPad	9
Small class size	9
Personal relationships with your faculty	8
High student satisfaction scores	8
Successful alumni at the school	7
Private school at public school cost	5
Career guidance available	5
Very high retention rate	5
Active and supportive alumni	4
Most students graduate on time	4
High-touch community	3
Develop relationships with fellow students	2
Celebrity alumni at the school	1

***Institutions that have low tuition rates and high job placement rates have powerful messages to communicate to prospective students. Institutions that are relatively expensive or that have low job placement rates need to clearly communicate their value propositions, such as successful alumni, high-touch communities and speed to degree.***

## Choosing Program or Institution First

More than 60% of online students began by selecting the program they were interested in studying, such as nursing, followed by choosing which institution they wanted to attend. One-quarter of students reported selecting both a program and institution at the same time.

*If an institution doesn't offer the program an online student is looking for, many will not even consider enrolling in that institution. To appeal to the largest audience, schools need to offer the specific programs and degrees that are most in demand. At the same time, niche programs (specializations that typically attract small numbers of online students) can still be marketed — but to a larger population base and by institutions that have credibility and history in such areas.*



## Number of Institutions Contacted

One-third of students considered only the institution in which they enrolled when deciding to pursue their education online. On average, between two and three schools were considered by online students. Graduate students were slightly more likely to consider more than one institution.

<b>Besides the school in which you enrolled, how many other schools did you contact or request information from?</b>	<b>Percent of Respondents</b>		
	<b>All</b>	<b>Undergraduate</b>	<b>Graduate</b>
Zero/no other schools considered	33%	36%	29%
One	16	16	17
Two	25	25	26
Three	14	14	14
Four	4	4	5
Five	4	3	6
More than five	3	3	3
<i>Mean number of schools contacted</i>	<i>1.75</i>	<i>1.65</i>	<i>1.89</i>

*These data indicate that online students don't shop around very much. If the institution offers the desired program, students may enroll at the first institution that responds to their inquiry, or they may predetermine the desired institution and only apply there. Therefore, it is important for leaders to promote awareness of the online programs available at their institution and respond promptly to inquiries with close follow-up. It appears that a substantial number of students will attend the institution of interest unless something happens to derail the process.*



## Top Reason for Selecting First-Choice School

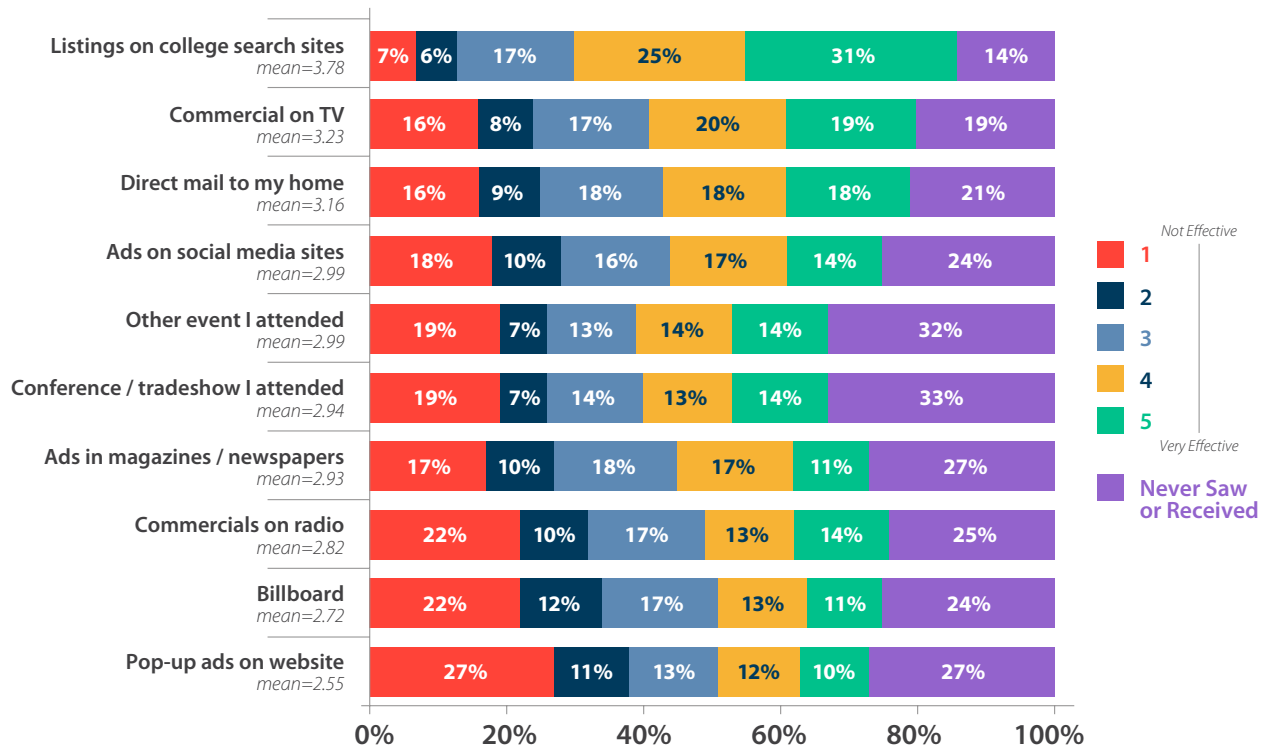
Students were asked to identify the most important single reason for selecting an institution. The strongest driver for their selection was the online program being the best match for them. For 20% of respondents, being less expensive than others was the most important reason for their choice, slightly more than the school's reputation.

<b><i>What was the most important reason you selected your top choice school, relative to the others you contacted or requested information?</i></b>	<b>Percent of Respondents</b>
The program was the best match	36%
It was less expensive	20
It has a better reputation	13
It was the institution that was recommended to me by someone I respect	10
It was the institution I knew best	8
I didn't contact any other institutions	8
It had a faculty member I knew/respected	2
Other	4

## Effectiveness of Marketing Channels

Students were asked to rate 10 separate marketing channels in terms of how effective they were in making them aware of online programs. Listings on college search sites and commercials on TV were the two most effective channels, with a mean score of 3.78 out of 5.00 for listings on college search sites and a score of 3.22 for TV commercials. Billboards (2.73) and pop-up ads (2.56) were seen as the least effective marketing messages for raising awareness of an online program.

### HOW EFFECTIVE WERE EACH OF THE FOLLOWING ADVERTISING METHODS IN MAKING YOU AWARE OF POTENTIAL ONLINE PROGRAMS?

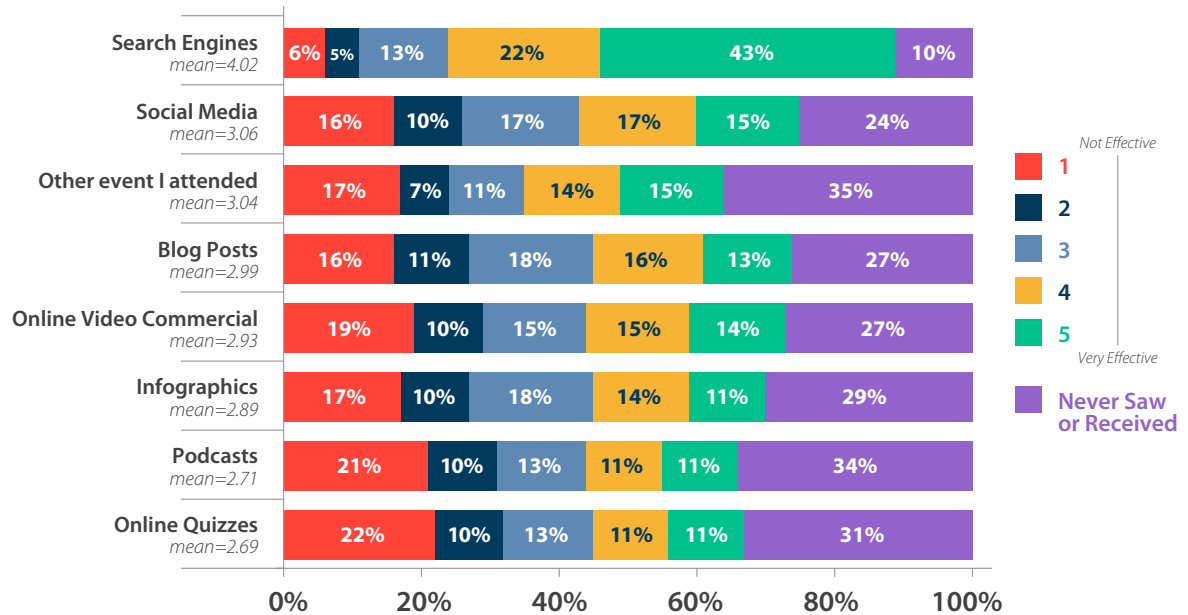


*As mentioned above, if a student is not aware that your institution offers the online program they are looking for, it will be difficult to be included in the two to three with which they make contact. A portion of your marketing budget should be dedicated to program awareness. Students indicate that these funds should be prioritized to college search sites, commercials and direct mail. While these channels may be seen as raising awareness, they were not included in the methods students used to request information, so do not expect a direct response to these channels.*

## Content Sources for Program Awareness

Students were asked about the effectiveness of content types in raising awareness of available online programs based on a 5-point effectiveness scale. The types of content that was most commonly found effective were search engines and social media posts, with an average score of 4.0 and 3.06 respectively. Online podcasts (2.71) and online quizzes (2.69) were seen as the least effective types of content.

### HOW EFFECTIVE WERE EACH OF THE FOLLOWING SOURCES IN MAKING YOU AWARE OF POTENTIAL ONLINE PROGRAMS?



*Content development and promotion is a strategic tactic to raise program awareness by increasing referred website traffic and rankings on search engine results pages. However, in order to be effective, the content needs to be appealing to prospective students and it needs to be targeted at the right channels. When developing content, listings on search engines and social media presence should be prioritized.*

## Process After Identifying Institutions of Interest

Almost half of students (49%) turned directly to the college's website to gather further information about their institution of interest. College websites were followed closely by internet search engines (44%), while approximately one-third of students called the institution directly.

<b><i>After identifying institutions of interest, what were your primary methods of gathering detailed information? (Select all that apply)</i></b>	<b>Percent of Respondents</b>
Direct visits to the websites of the colleges of interest	49%
Internet search engines (Google, Bing, etc.)	44
Phone calls to the institutions	34
Printed college guides and other materials	32
Conversations with friends, family	31
Attend an open house/other event	24
Conversations with employer or colleagues	21
College search sites like eLearners.com, ClassesUSA, eLearnPortal.com	18
Attend a virtual open house	18
Live chat on the college website	15
Social media sites (Facebook, LinkedIn, Google+, etc.)	15
Other	1
I don't remember	2

***The channels that were identified as effective at raising program awareness are not necessarily the channels students turn to for detailed information about a school. While institutions should maintain a presence on the channels that raise program awareness as well as those that serve as a source for more detailed information, it is important to realize how each channel is being used and to tailor the messaging appropriately.***

## Most Important Information from Institution

Tuition and fees were the most important information for 74% of prospective online students when deciding which institution to select. Admission requirements (59%) and the degrees offered (50%) were also highly sought information for more than half of online students. Financial aid information was significantly more important to undergraduate students, but it only ranked seventh for all students.

<b><i>Which of the following were the most important types of information you looked for in helping to select an institution? (Select all that apply)</i></b>	<b>Percent of Respondents</b>
Tuition and fees	74%
Admission requirements	59
Available degree majors and programs	50
Course schedules	47
Courses included in program curriculum	46
Career options for each degree area	42
Specific course descriptions	37
Financial aid information	36
Application form/instructions	34
Career placement of graduates	30
Faculty profiles	12
Open house details	9

***The college or university website should clearly present information about tuition and fees. Students prefer total degree and course costs over per-credit cost. Information about average transfer credits accepted can also be useful to students to put total degree cost in perspective.***

## Format of Information

Online students ranked four common formats for receiving information about the online program they researched, with 1 being highest and 5 being lowest. Written text was the most appealing format for receiving information. The second most appealing format was video, followed by infographics. Audio was seen as least appealing of the options.

<b><i>What is your preferred format for the information you gather online?</i></b>	<b>Mean Rank of Respondents</b>
Written text	1.55
Video	2.25
Infographics and other charts and tables	3.11
Audio	3.27
Other	4.82

***Students demonstrated a preference for the traditional written text. Ensure written copy is of the highest quality and inclusive of all information prior to expanding to other types of content.***

## Devices Used During the Search Process

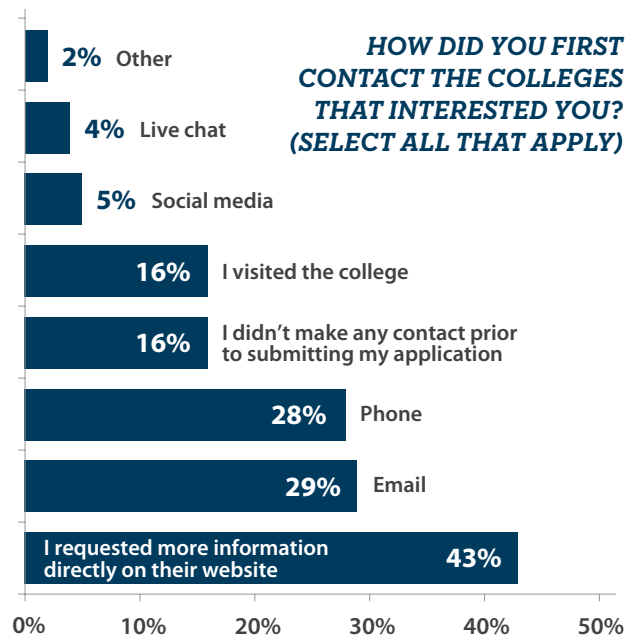
The majority of online students consistently used their computers throughout the enrollment funnel, from the initial search to the eventual application. Smartphones and tablets were used by slightly more than one-quarter of students during the initial search and information gathering, but smartphone and tablet use decreased significantly during the application phase. Phone calls to the institution occurred most often during the information gathering process (27%).

<b>Please select what device(s) you used (will use) during the different stages of the search process for your online program. (Select all that apply)</b>	<b>Smartphone (Web browser)</b>	<b>Phone (Called)</b>	<b>Tablet (Web browser)</b>	<b>Computer (Web browser)</b>
Initial search for program/school	29%	18%	23%	72%
Gathering information about a specific program/school	28	27	24	73
Completing applications to schools	15	18	15	79

## Method of First Contact

Online students heavily favored the use of a college's website, with 43% of respondents using it to request more information about their program of interest. Twenty-nine percent sent an email for more information, and 28% called the institution. Newer technology, such as social media and live chat functions, were far less utilized.

*It's important for college websites to have an easy way for prospective students to request additional information as it's their preferred method of first contact. Also clearly call out an appropriate phone number and email for contact. Do not bury the request form or online program contact information in web pages, but rather make it clearly visible.*



## Importance of First Contact

Half of graduate students and 40% of undergraduates enrolled at the institution that responded to them first with the information they requested. Factoring in those students who only contacted one institution, these numbers rise to 69% and 65% respectively.

<b><i>Did you enroll in the college that got back to you first with the information you requested?</i></b>	<b>Percent of Respondents</b>		
	<b>All</b>	<b>Undergraduate</b>	<b>Graduate</b>
Yes	43%	40%	49%
No	34	35	32
I only contacted one college	23	25	20

## Speed of Contact

Online students would like to hear back from colleges rapidly but not instantaneously. Online students would like responsive service. While a relatively minor portion (9%) expect to hear back within the hour, a majority (66%) prefer a response within a day. Very few find a response time over two days acceptable.

<b><i>How soon after making your initial inquiry to a college would you like to hear back from the college?</i></b>	<b>Percent of Respondents</b>	
	<b>2012</b>	<b>2015</b>
Within an hour	13%	9%
Within 24 hours regardless of the day	36	30
By the next business day	NA	27
Within two days	30	27
More than two days	21	8

***The more quickly your college admissions department responds to prospective online students, the more likely these students are to enroll in your program. As the response time lengthens past one hour, fewer students are satisfied, and the possibility of another institution responding first increases. Only a small percentage of students are satisfied with response times that extend beyond two days.***

## Frequency of Contact

Seventy percent of online students would like to hear periodically from colleges after submitting an inquiry. Within those wanting routine contact, the preferred frequency varies greatly and thus is consumer-specific.

<b><i>How frequently would you like to periodically hear from colleges that you have inquired to?</i></b>	<b>Percent of Respondents</b>
More than once per week	10%
Once per week	23
Once every other week	16
Once every three weeks	7
Once a month	11
Less than once a month	4
I only want to hear from a college in response to an inquiry	30

***Because preferences vary greatly across online students, colleges and universities would benefit from asking each prospective student their expectations and preferences on how often they would like to be contacted and then follow suit.***

## Least Effective Time to Contact Students

Sundays (47%), Saturdays (37%) and weekday mornings (34%) were the least attractive times to contact prospective online students. By contrast, weekday afternoons were the most attractive time to contact prospects, and 22% of prospects noted that colleges could contact them at any time.

<b><i>Are there times of the day/week that you do NOT want to be contacted? (Select all that apply)</i></b>	<b>Percent of Respondents</b>
Sundays	47%
Saturdays	37
Weekday mornings	34
Weekday evenings	26
I can be contacted anytime	22
Weekday afternoons	18



## Communication After Application

After students submit their application to a college, 71% would like to receive more information on their program as well as information about financial aid (59%). Close to half of online students would also like to receive more information about enrollment logistics (53%) and information about student and academic services (46%). The following were less popular: welcome messages from the head of the program (38%), current students (24%) or alumni (21%). In general, undergraduate students were significantly more interested in financial aid information.

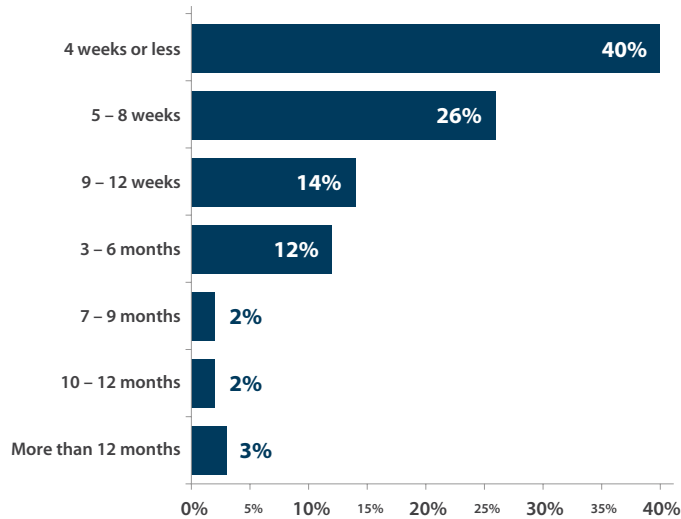
<b><i>What types of communications would you like to get from a college after you submitted an application? (Select all that apply)</i></b>	<b>Percent of Respondents</b>
Detailed information about your program	71%
Information on financial aid	59
Information about program/enrollment logistics	53
Information about student and academic services	46
A personal welcome from the head of the program you are interested in	38
A welcome message from a student currently enrolled in your program	24
A welcome message from alumni of the program	21
Something else	1

***Even though the period of time between selecting an institution and beginning classes is relatively short, this period can be effectively used to maintain student interest by supplying students with information about their program. Online prospective students show a desire for practical information such as financial aid and process guidance. Ensure this type of information is accurately prioritized and communicated prior to less substantive communications.***

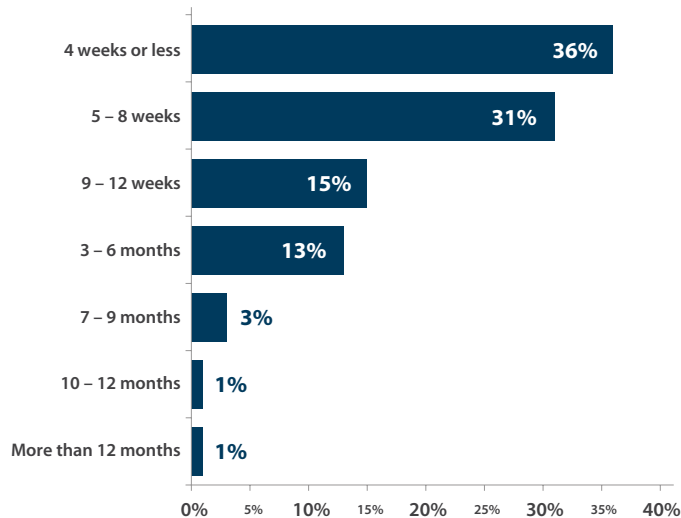
## Length of Time from Search to Enrollment

In breaking down the enrollment funnel, it appeared that online students both at the undergraduate and graduate level followed similar timelines. Two-thirds (66%) of online students spent eight weeks or less searching for a program and completing their applications. Forty percent spent less than four weeks. From the time they submitted their application, 67% spent eight weeks or less waiting for their first class to start, with 36% waiting less than four weeks.

### **HOW LONG DID IT TAKE YOU FROM THE TIME YOU FIRST STARTED YOUR SEARCH FOR AN ONLINE PROGRAM TO COMPLETE YOUR APPLICATION?**

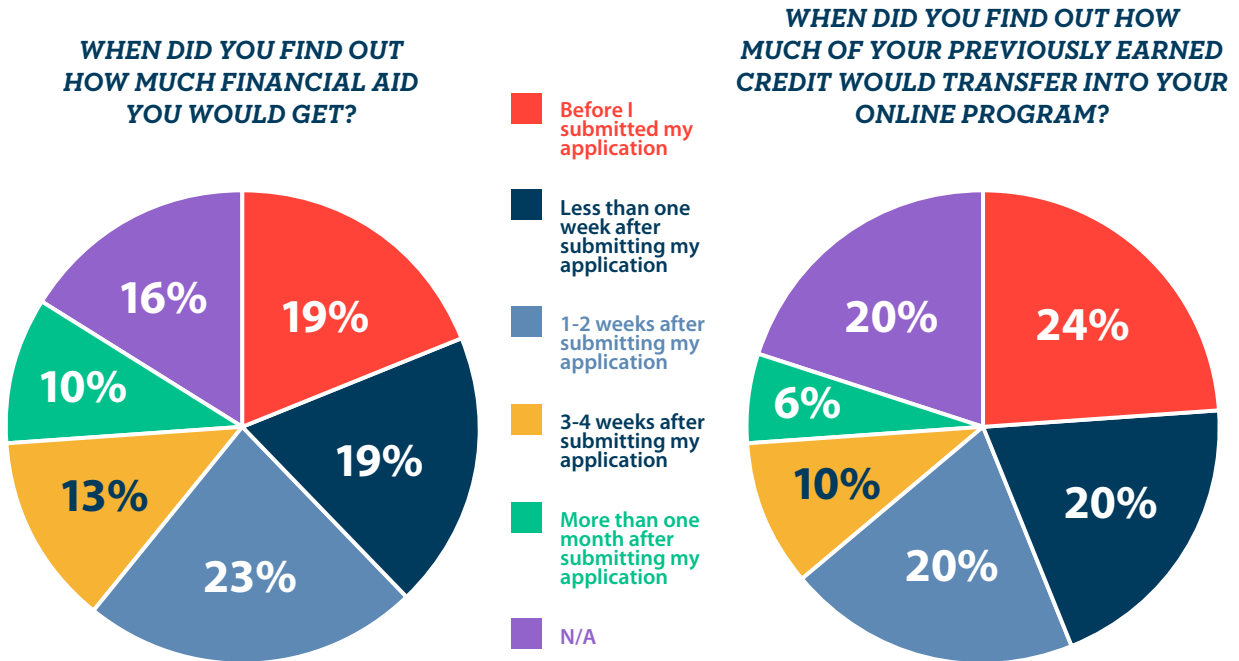


### **AFTER SUBMITTING YOUR APPLICATION, HOW LONG DID IT TAKE TO ACTUALLY START CLASSES?**



*Prospective online students continue to act quickly, thus time is of the essence. The application process should be easily completed within four weeks and classes would optimally start every eight weeks.*

Forty-two percent learned about their financial aid package within two weeks of submitting their application, and 40% spent two weeks or less waiting to see how many credits would transfer. One-quarter (24%) found out about their transfer credits before they submitted their application.



*Affordability is very important to online students. As such, they want to know their financial aid package and receive their transfer credit review early in the process. Competitive institutions will develop the processes to supply this information to prospective students within a few days.*

## The Online Classroom

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### Preferred Instruction

Online students were split on the type of instruction they most preferred. Thirty-seven percent preferred a tutorial style with students completing tasks at their own pace and contacting an instructor with questions. Not far behind, 34% preferred an independent study model, with students studying at their own pace and not interacting with an instructor. Twenty-nine percent preferred the instructor-led model, where an instructor takes students through their learning activities.

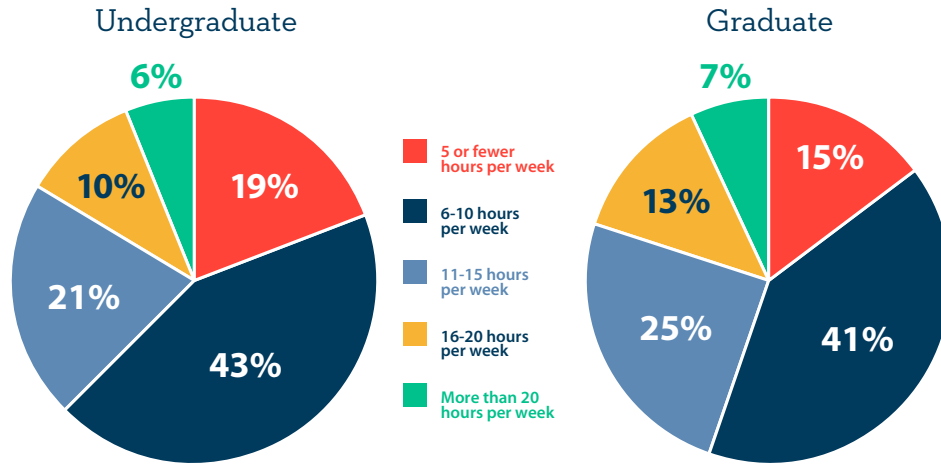
<b><i>Which of the following models for studying online would you most prefer?</i></b>	<b>Percent of Respondents</b>	
	<b>2012</b>	<b>2015</b>
<b>Tutorial:</b> Students complete a series of learning activities at their own pace, with an instructor available to answer questions and then complete assignments/exams.	32%	37%
<b>Independent Study:</b> Students study independently at their own pace, with books and other resources provided by the university and then complete assignments/exams.	33	34
<b>Instructor-Led:</b> Students complete a series of instructor-led learning activities and discussion forums with a class of other students and then complete assignments/exams as scheduled.	35	29

*Online students have a clear and growing preference for self-paced learning. Two-thirds do not prefer the traditional, instructor-led online class. A handful of colleges and universities are implementing competency-based education models, which often include self-pacing. If online courses are designed following best practices, they typically have clear assessments in place and could be converted to self-paced programs fairly easily.*

## Number of Hours of Study per Week

Online students reported varying amounts of study time per week for each course in which they were enrolled. However, 42% reported spending between six and 10 hours per week per course — a total of 59% reported 10 hours or less per week.

### HOW MANY HOURS DID YOU SPEND ON SCHOOL WORK EACH WEEK ON EACH ONLINE COURSE IN WHICH YOU ENROLLED (including required assignments and studying)?

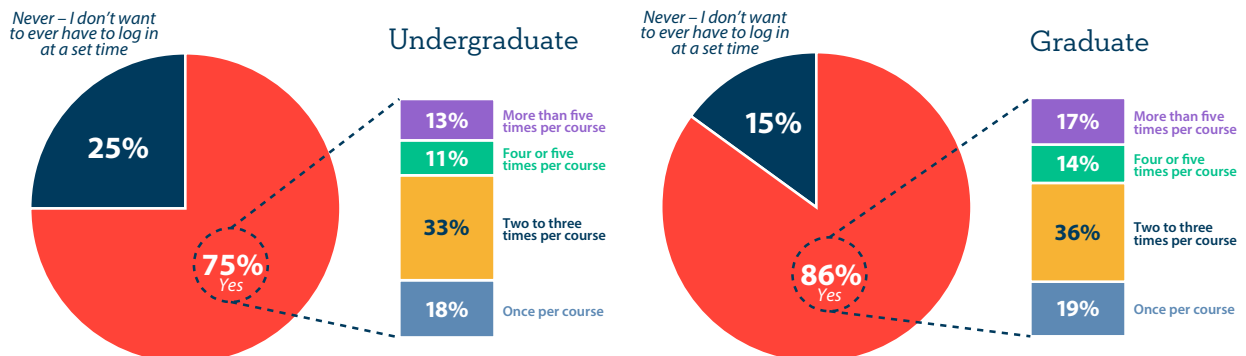


*Institutions that use terms of eight weeks or less with three-semester credit courses should be careful that their courses are creditworthy. A three-semester course should require about 140 hours of student work regardless of term length. For an eight-week term, this translates to 17.5 hours per week.*

## Synchronous Discussions

Seventy-five percent of undergraduates and 86% of graduate students were willing to log in for a synchronous discussion during their online coursework. The number of times per course they were willing to do so varies, but one-third were willing to log in two to three times per course for a virtual lecture or discussion. Undergraduates were significantly less willing to participate in synchronous activities than graduate students, by a margin of 25% of undergraduates to 15% of graduate students.

### 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?



## Engagement Tools

Forty percent of online students felt that posting to message boards was the most effective way to encourage students to engage with one another. One-quarter (25%) felt group projects would be the most effective technique.

<b>Which of the following do you think is the most effective in encouraging online students to engage with each other?</b>	<b>Percent of Respondents</b>
Posting to online message boards	40%
Doing group projects	25
Being assigned a "partner" in your class	16
Simulations	11
Blogging	7
Something else	1

*Student engagement is correlated with student persistence and satisfaction. Virtually all online classes incorporate message board discussions. Over one-third of students listed group projects, working with a partner or simulations as the single effective method for encouraging engagement. Institutional leaders should consider this fact when designing courses to increase student engagement.*

## Academic Advisement

Online students were equally split between supporting a 24/7 on-demand system of advisement and being advised by a faculty member in their chosen field of study.

<b>Which of the following types of academic advisement would be most helpful to you?</b>	<b>Percent of Respondents</b>
A faculty member from your field of study who you regularly meet (virtually) to discuss your courses and your schedule	36%
An "on-demand" system, where you can contact an advisor 24/7 and get someone who can help you plan your schedule, answer basic questions, etc.	36
A professional advisor who is not a faculty member that you work with throughout your program and is there to answer your questions	27
Something else	0

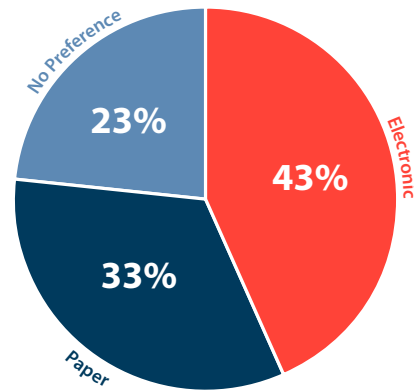
*A sub-theme among these respondents is that online students would like more interaction with faculty members. In the question above, about one-third would prefer a faculty member as an advisor. A previous question revealed that 21% listed "Inconsistent/poor contact and communication with instructors" as a concern with online classes. Setting expectations for faculty interaction and using faculty members as advisors in some capacity would improve student satisfaction and, most likely, retention.*

## Electronic Course Materials

Online students preferred electronic course materials (e.g., textbooks) to those delivered on paper (43% compared to 33%). Just less than a quarter (23%) did not have a specific preference.

*Providing students a choice in electronic vs. paper course materials is a best practice.*

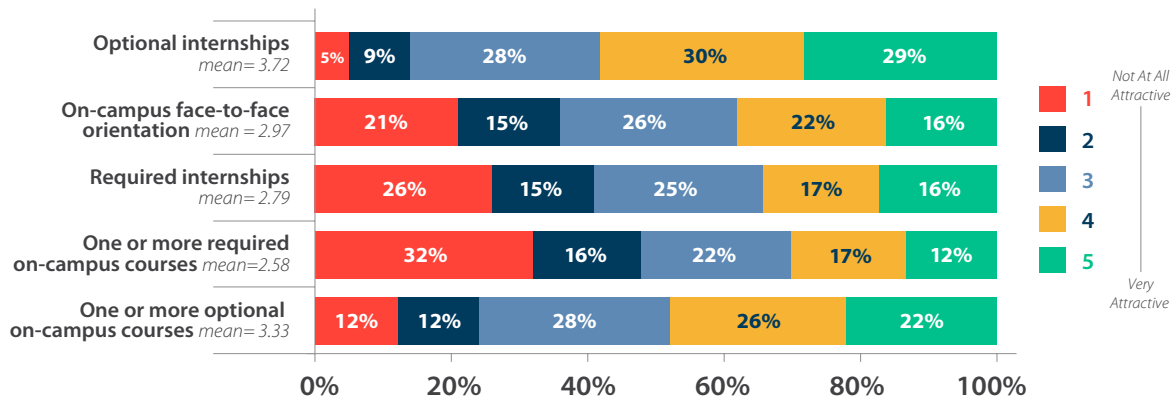
**DO YOU HAVE A PREFERENCE FOR THE FORMAT OF YOUR COURSE MATERIALS?**



## Online Program Features

Online students were asked to rate the attractiveness of certain programmatic features found in some online programs. In reviewing the mean scores of the responses given, optional internships were seen as the most attractive option, with a 3.72 score out of a 5.00 rating. This was followed by optional on-campus courses (3.33), face-to-face orientation (2.97), required internships (2.79) and required on-campus courses (2.58).

**HOW WOULD YOU RATE THE ATTRACTIVENESS OF THE FOLLOWING FEATURES OF SOME ONLINE PROGRAMS?**



*Internships are valued by online students and are effective stepping-stones to a first or new job. Designing flexible internship programs would be an effective way to engage students and help them meet their employment objectives.*

## Financing Online Classes

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### Presenting Cost Information

The students surveyed were equally likely to consider the cost of their program in terms of the cost per course (35%) or the total degree cost (38%). One-fifth (20%) considered the cost per credit.

<b><i>When considering cost as part of your enrollment decision, do you think in terms of cost:</i></b>	<b>Percent of Respondents</b>
Total degree cost	38%
Per course	35
Per credit	20
Total certificate/license cost	7

*Cost is a major concern for online students, and one of the top information items they look for on the institution's website. It is a challenge to present total degree cost because most online students receive some transfer credit. Presenting historical averages of the amount students actually paid by program would be a good way to communicate cost.*



## Total Cost

Students were asked what they paid per credit, course, or degree or certificate (not including fees). The data were cleaned for extreme outliers such as \$1 per credit or \$20,000 per course. Undergraduates reported paying \$345 per credit, and graduate students reported paying \$615 per credit, on average. The data below are reasonably consistent. If the graduate tuition per credit was \$615, as reported here, and the total tuition was \$23,800, the required credits for the degree would be 38.7. Most online master's degrees are between 30 and 36 credits, thus there is a small inconsistency between the reported per-credit cost and degree cost.

For the undergraduates, a per-credit cost of \$345, as reported here, divided into the total cost of \$24,880, yields 72 credits. Undergraduate degrees typically require 120 credits. Therefore, if the data are accurate, students on average had 48 transfer credits. Previous surveys in this series reported that approximately 80% of online students received transfer credit, with a typical range of 30 to 60 credits. These estimates are within that range.

<b>Mean cost per:</b>	<b>Mean Undergraduate Price</b>	<b>Mean Graduate Price</b>
Credit	\$345	\$615
Course	\$1,120	\$1,170
Degree	\$24,880	\$23,800
Certificate/license	\$4,070	\$4,760

*High school graduates without a college credential tend to overestimate the cost of college attendance (Kelly, 2015). Providing accurate information about per credit cost, per course cost and total cost per credential would encourage these students to make the decision to enroll. When presenting cost information, online leaders need to account for the undergraduate transfer credit issue. Most students don't pay the full cost of the degree because they bring transfer credit. Presenting historical data about the average number of transfer credits and the average cost paid at the institution would be helpful.*

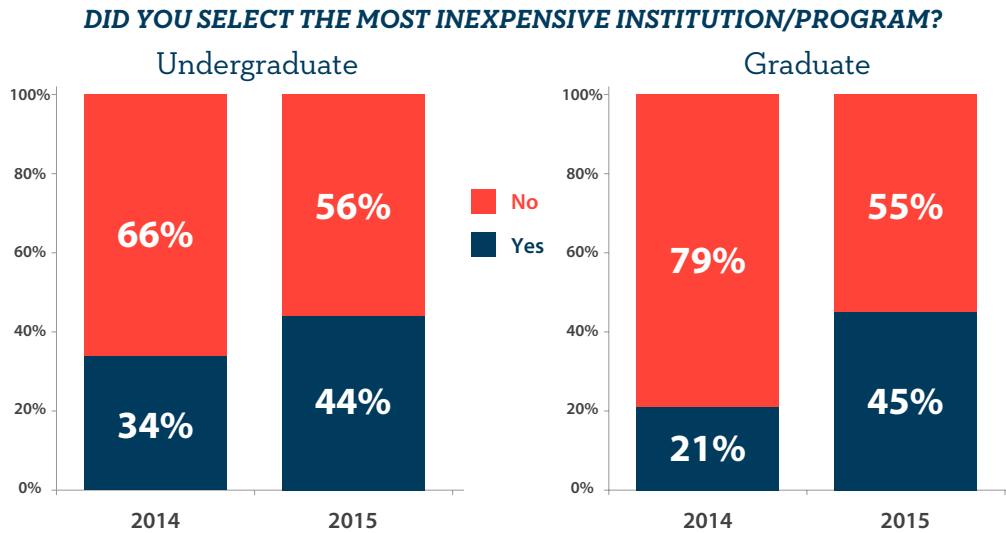
## Cost Conscious

Two-thirds of the respondents were aware of the total cost of the colleges they were considering.

<b>When evaluating online programs, did you know the total cost of each of the colleges you seriously considered?</b>	<b>Percent of Respondents</b>
Yes	68%
No	32

## Select an Institution by Cost

Online students were split, but 55% report they did not select the least expensive institution despite how much cost weighs on their final decision. This was a significant decrease from 2014, when 70% reported they did not select the most inexpensive option.



*Regardless of the trend, a significant minority of students select the least expensive program. When accreditation, as reported earlier, is the primary method of determining institutional reputation, it is logical for students to select the least expensive option because virtually all providers are accredited. If an institution is not the lowest-cost provider in the region, leaders need to justify the price differential with factors such as student outcomes or service levels.*

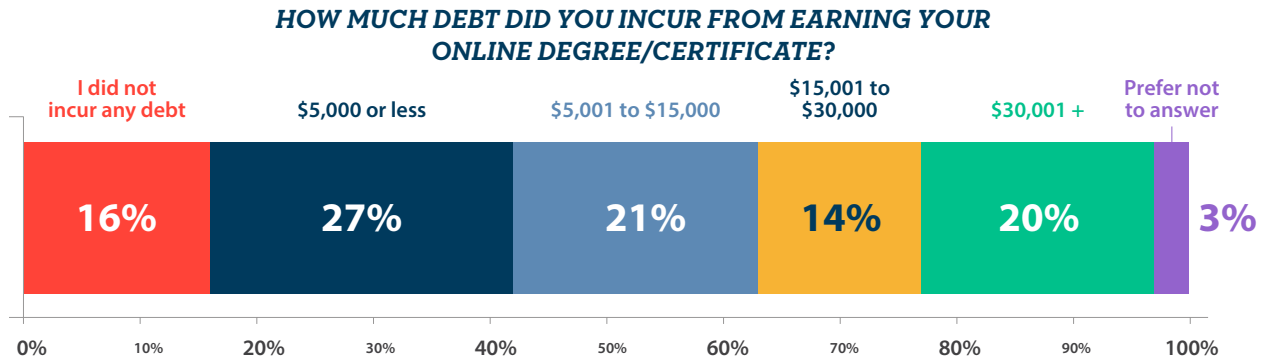
## Paying for Online Program

Personal funds (44%) and student loans (42%) were the two most common methods for students to pay for their online education. One-third of online students overall and 40% of undergraduates relied on government grants, such as Pell Grants. Graduate students were significantly less likely to use government grants and more likely to use employer tuition reimbursement benefits.

<b>How did you pay for your online program? (Select all that apply)</b>	<b>Percent of Respondents</b>		
	<b>All</b>	<b>Undergraduate</b>	<b>Graduate</b>
Personal funds (This includes your own cash, check or credit card, gifts and loans from family/friends)	44%	43%	46%
Student loans (government, Stafford, etc.)	42	45	39
Government grants (Pell, etc.)	33	40	24
Employer tuition support benefits	17	13	23
Private scholarships	15	13	17
Private loans	12	11	14

## Debt Incurred

Cost is always a concern for any degree, either online or on campus. Therefore, students who had completed their program were asked about the debt they incurred during their online study. The debt reported by both undergraduate and graduate students was similar. Over one-quarter of the respondents reported debt of \$5,000 or less. One-fifth incurred debt between \$5,001 and \$15,000, with one-third incurring debt of over \$15,000.



*A college graduate earns about \$900,000 more than a high school graduate over a lifetime. Over a 45-year working career, this equates to \$20,000 per year. Newly minted graduates don't make average salaries, but there is a substantial difference in earning power. Previous reports in this series showed that one-third of students improved their employment status (first job, new job, full-time job) within a year of graduation, and about 20% of undergraduates and one-third of graduate students received a raise within one year of graduation. If online program graduates used their increased earnings to retire their debt, the majority could do so within a few years. This calculation doesn't take into account the time and effort invested in earning a college credential. But on the basis of cost, the value proposition is strong. This would be a good message for online leaders to incorporate into their marketing strategy using institutional data.*

## Time to Repay Debt

Thirty percent of students felt they could pay off their student debt in two years or less, but 20% thought it would take 10 years or more to repay all the debt they incurred from their degree.

<b>From the time you complete your program, how long do you think it will take you to pay off the debt you incurred?</b>	<b>Percent of Respondents</b>
Less than 1 year	11%
1 to 2 years	20
3 to 4 years	13
5 to 7 years	8
8 to 10 years	12
11 to 15 years	5
16 to 20 years	5
More than 20 years	10
I did not incur any debt	16

## Influence of Scholarships

Two-thirds of students did not receive a scholarship when they enrolled in their online program. Eighty-nine percent of online students felt an annual \$2,500 scholarship would have swayed them at least somewhat to enroll in one institution over another. Of those who said they would not have been swayed by a \$2,500 scholarship (11%), 64% felt an annual \$5,000 scholarship would have swayed them at least somewhat.

<b><i>Did you receive any scholarships or awards from your college as a part of your enrollment package?</i></b>	<b>Percent of Respondents</b>
Yes	34%
No	66

<b><i>To what extent would a \$2,500 annual scholarship have swayed you to enroll in one online institution over another?</i></b>	<b>Percent of Respondents</b>
Not at all	11%
Somewhat	38
Definitely	19
Very much	32

<b><i>To what extent would a \$5,000 annual scholarship have swayed you to enroll in one online institution over another? (Asked of those who responded "Not at all" to the question above.)</i></b>	<b>Percent of Respondents</b>
Not at all	36%
Somewhat	43
Definitely	5
Very much	16

## Methodology

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In spring 2015, Aslanian Market Research and Learning House conducted surveys with more than 1,500 individuals nationwide and this report highlights our findings. Respondents were at least 18 years of age, had a minimum of a high school diploma or equivalent, and were recently enrolled, currently enrolled, or planning to enroll in the next 12 months in a fully online undergraduate or graduate degree, certificate or licensure program.

According to the U.S. Department of Education, graduate students represent 16% of the total college population but 25% of the online population. The sample for this survey was weighted to include approximately 40% graduate students to ensure a large enough sample for meaningful conclusions. The data are presented for both undergraduate and graduate students combined unless there were noteworthy differences.

Resolution Research of Denver, Colorado, identified the sample of respondents. The organization drew the sample from its actively managed, 100% market-research-only panel that represents the U.S. Census Bureau, which enables the selection of groups that prove difficult to source. Resolution Research has collected up to 250 behavioral and demographic data points on each consumer panelist, which allows it to target respondents for specific research objectives.

To recruit for this study, Resolution Research invited its panel of consumers from across the nation to participate in an online survey through custom email invitations. Invitations were sent randomly across the United States to reflect the basic population distribution targeting persons 18 years of age or older. Panelists were then allowed to participate in the study if they were currently enrolled in, had firm plans to enroll in, or had within the past twelve months participated in a fully online degree, certificate or licensing program.

Respondents hailed from 49 states and the District of Columbia. The states that represent 51% of the nation's population (according to the 2012 U.S. Census Bureau) represented 51% of the study's respondents. These states included California, New York, Florida, Illinois, Texas, Georgia, Pennsylvania and Ohio.

The National Center for Education Statistics IPEDS data show that in 2013, 2.6 million higher education students were enrolled in courses that were exclusively delivered via distance education. Eduventures (2015) estimated the size of the wholly or majority online program market for the fall of 2013 to be 3.2 million students. Based upon these findings, a sample of 1,499 represents approximate sampling error of +/-3% at a 95% confidence level.

## Demographics

### Gender

The significant majority of online students are consistently female at both the undergraduate and graduate levels. This ratio has been steady over the last four years of surveys with a slight up-tick in males at the graduate level in 2013.

<b>Gender</b>	<b>Percent of Respondents</b>							
	<b>Undergraduate</b>				<b>Graduate</b>			
	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Male	26%	31%	29%	29%	34%	46%	34%	27%
Female	74	67	71	70	66	53	66	72
Prefer not to say	0	1	< 1	1	0	1	< 1	0

### Age

Thirty-four percent of undergraduate online students were under the age of 25 and 36% of graduate students were under the age of 30, showing the online market skewing closer to “traditional” academic age ranges. Mean undergraduate age was 32.3 years and mean graduate age was 35.0 years. There appeared to be a trend emerging for younger students (18 to 24 years of age) enrolling in online programs.

<b>Age</b>	<b>Percent of Respondents</b>			
	<b>Undergraduate</b>		<b>Graduate</b>	
	<b>2012</b>	<b>2015</b>	<b>2012</b>	<b>2015</b>
18 to 24	25%	34%	13%	19%
25 to 29	17	16	24	17
30 to 34	13	12	16	18
35 to 39	12	11	14	13
40 to 44	12	9	11	10
45 to 49	10	8	10	9
50 to 54	8	5	8	8
55 or older	4	5	4	6

## Marital Status

From 2013 to 2015, there was a significant decline in the percentage of married and partnered individuals enrolled in online programs.

<b>Marital Status</b>	<b>Percent of Respondents</b>			
	<b>Undergraduate</b>		<b>Graduate</b>	
	<b>2013</b>	<b>2015</b>	<b>2013</b>	<b>2015</b>
Married/partnered	51%	45%	72%	56%
Single	46	54	26	43
Prefer not to say	3	1	2	1

*Note that marital status was not asked in the Online College Students 2012 survey.*

## Number of Children (Under 18)

The percentage of online students with no children trended upward, with 59% of undergraduates and 50% of graduate students reporting no children. This follows suit with the prevalence of unmarried/not partnered online students.

<b>Number of Children</b>	<b>Percent of Respondents</b>			
	<b>Undergraduate</b>		<b>Graduate</b>	
	<b>2013</b>	<b>2015</b>	<b>2013</b>	<b>2015</b>
None	50%	59%	36%	50%
1	21	16	20	23
2	17	15	22	19
3 or more	11	8	21	8
Prefer not to say	1	1	1	1

*Note that number of children was not asked in the Online College Students 2012 survey.*

## Total Household Income

The mean household income among all online students was close to \$55,000. Among undergraduate students, the mean household income was close to \$50,000, while the mean among graduate students was close to \$70,000.

<b>Total Household Income</b>	<b>Percent of Respondents</b>			
	<b>Undergraduate</b>		<b>Graduate</b>	
	<b>2012</b>	<b>2015</b>	<b>2012</b>	<b>2015</b>
Less than \$25,000	18%	20%	4%	13%
\$25,000 to \$39,999	20	22	8	12
\$40,000 to \$54,999	15	14	14	10
\$55,000 to \$69,999	12	12	13	13
\$70,000 to \$84,999	10	9	13	12
\$85,000 to \$99,999	7	6	12	11
\$100,000 to \$114,999	6	4	9	8
\$115,000 to \$129,999	2	2	5	4
\$130,000 to \$149,999	2	2	4	4
\$150,000 or more	4	2	10	7
Prefer not to say	5	7	8	5

## Ethnicity

There has been a significant increase in the number of white graduate students since 2012.

<b>Ethnicity</b>	<b>Percent of Respondents</b>			
	<b>Undergraduate</b>		<b>Graduate</b>	
	<b>2012</b>	<b>2015</b>	<b>2012</b>	<b>2015</b>
African American	18%	11%	18%	11%
Asian or Pacific Islander	5	5	13	10
Hispanic	8	6	9	7
Native American	1	1	0	1
White	64	71	57	68
Other	2	2	1	2
Prefer not to say	2	3	2	2



## English as a Second Language

About one in five online students spoke English as a second language. This percentage is consistent across undergraduate and graduate students and has been relatively consistent since first asking the question in 2013.

<b>English as a Second Language</b>	<b>Percent of Respondents</b>			
	<b>Undergraduate</b>		<b>Graduate</b>	
	<b>2013</b>	<b>2015</b>	<b>2013</b>	<b>2015</b>
Yes	82%	17%	78%	16%
No	18	83	22	84
Prefer not to say	0	1	0	0

*Note that English as a second language was not asked in the Online College Students 2012 survey.*

## Employment Status

Undergraduate employment status remained consistent over time. On the graduate side, from 2012 to 2015, more respondents are unemployed and fewer are employed full-time.

<b>Employment Status</b>	<b>Percent of Respondents</b>			
	<b>Undergraduate</b>		<b>Graduate</b>	
	<b>2012</b>	<b>2015</b>	<b>2012</b>	<b>2015</b>
Employed full-time	48%	44%	73%	63%
Employed part-time	24	24	16	15
Not employed	27	27	11	19
Retired	2	2	1	2
Prefer not to say	NA	3	NA	1

## Military Service

Few respondents to the survey were activity-duty military. A larger percentage (7%) were a spouse or dependent of someone with military service. Military service background was consistent across undergraduate and graduate respondents.

<b>Military Service</b>	<b>Percent of Respondents</b>	
	<b>2012</b>	<b>2015</b>
Active-duty military	1%	2%
Veteran	4	5
Reserve	1	NA
Spouse or dependent of active duty	NA	3
Spouse or dependent of veteran	NA	4
None of the above	94	87

## Highest Completed Level of Education

Prior to enrollment in their current online program, the majority of students (57%) had completed less than a bachelor's degree. For those pursuing an undergraduate degree, the majority come with prior college experience (59%). Interestingly, nearly one in three students pursuing a graduate degree did not enter the program with a bachelor's degree.

<b>Level of Education</b>	<b>Percent of Respondents</b>		
	<b>All</b>	<b>Undergraduate</b>	<b>Graduate</b>
High school diploma/GED	14%	18%	9%
One or two years college, no degree	21	30	8
Associate degree	16	20	11
Three or four years college, no degree	6	9	3
Bachelor's degree	28	18	41
Some graduate courses, no degree	5	3	8
Master's degree	8	1	17
Some doctoral courses, no doctorate	0	0	1
Doctorate	1	1	2

## Level of Study

Interview quotas were set to ensure 60% of the sample consisted of undergraduate students and 40% consisted of graduate students.

<b>Were you enrolled in:</b>	<b>Percent of Respondents</b>
Associate degree program	23%
Bachelor's degree program	35
Master's degree program	22
Doctoral degree program	3
Certificate program	13
Licensure program	3

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### **Technical Notes**

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

## Partners

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**The Learning House, Inc.** through its proprietary cloud-based technology platform helps colleges and universities create, manage and grow high-quality online degree programs and courses. Partnering with more than 75 schools, Learning House enables institutions to efficiently and affordably achieve their online education goals. Services include product development and market research, marketing and lead generation, enrollment management, student retention, curriculum development and management, faculty training and professional development, learning management systems and 24/7 technical support.

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

**Aslanian Market Research** (EducationDynamics' market research unit) conducts market demand studies, institutional audits, program and marketing reviews, and professional development seminars and workshops for colleges and universities seeking information and data on how to expand adult and online student enrollments. Throughout the last 25 years, our staff has worked with more than 350 colleges and universities of all types — public, private, large, small, rural, suburban, and urban — in every region of the U.S. Its seminars have provided thousands of college administrators with practical, hands-on tactics that they can implement at their institutions at minimal cost for maximum impact.

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