



Online College Students Report 2023

**12th Annual Report on the demands
and preferences of online
college students today**





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Suggested Citation: Aslanian, C.B., Fischer, Steven; Rick Kitchell, Creative Manager,
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The authors would like to thank the following colleagues at EducationDynamics for their assistance in the execution of this project: Bruce Douglas, Chief Executive Officer; Greg Clayton, President, Enrollment Management Services; Tracy Kreikemeier, Chief Relationship Officer; Katie Tomlinson, Sr. Director of Analytics & Business Intelligence; McKenna Serpa, Market Research Associate; Eric McGee, Sr. Director of Marketing & Corporate Communications; Thee Sao, Marketing Manager; and Rick Kitchell, Visual Design Specialist.

Preface

This is the twelfth edition of the **Online College Students Report**, a detailed report on the survey of 3,000 past, present, and future fully online college students. The purpose of this report is to give leaders in higher education the necessary data to best attract, serve, and retain online college students today. There are unique differences in preferences, needs, and requirements when comparing online college students with campus-based college students.

Participation in online college education has skyrocketed over the past few years. While demand peaked due to the COVID-19 pandemic, it has remained high in the ensuing semesters. As a consequence, colleges are increasingly competitive in serving this unique population.

The Fall 2021 National Center of Higher Education Statistics (NCES) report shows 19,140,689 were enrolled in United States institutions of higher education. Of these students, 30 percent were enrolled in online study (5,741,380). Another 29 percent (5,576,582) were enrolled in some distance courses. The following report examines a number of factors – socioeconomic status, availability of technology, access to pre-college resources, media usage, and key motives for enrolling online, to name a few – and explores how these factors affect the population makeup of online college students today. The survey asked respondents a variety of questions surrounding preparedness for college, which takes into account many factors surrounding each student’s unique life, background, and identity. Responses were collected from online graduate and undergraduate students.

The 2023 report seeks to accurately convey, through a variety of survey responses, the makeup of the online college student market in the US in 2023.

We hope this report helps to guide online higher education leaders on how to best serve the many students that are forging their higher education paths through online programs.



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Introduction and Key Findings

As we move forward through the 2020s, the online higher education landscape is transforming and evolving. The online college student of today is younger, working but with less work experience and trying to find a career or build a career. These students are increasingly choosing to study topics that were not at the forefront in previous years and doing so at the expense of other topic areas. The online college student of 2023 is not the online college student of 2020 or before.

Online study, thanks in part to remote study which was forced upon students due to COVID-19, has led to more acceptance of the format among students, student support networks, and employers. No longer is online study seen as a format that is to be used by older students, students who cannot make it to campus, or other placebound populations, but a format that is used and accepted widely by students of all types.

With these changes, there is no better opportunity for schools to reach out and enroll online college students, both undergraduate and graduate. Schools must be able to understand student demands and preferences as they build stronger footholds in the online study marketplace. They must answer important questions such as: How do schools seeking to enroll online college students market to these students and encourage enrollment at their institution? What topics should be offered that would be attractive to online college students? Are schools providing the right information to online college students when they visit their websites? Overall, what is important to online college students? These, and other questions, are vital questions with answers that have changed rapidly.

Streaming media usage is an example of this rapid pace of change. ComScore reports that, in March 2021-March 2022, there were 122 hours spent streaming on CTV per household in the US and 85.7 million homes streamed content per month in that time frame. Moreover, since 2020 there has been a 29 percent growth in advertisement supported streaming services. At the same time, there has been a six percent decline in households that subscribe to cable or satellite television.¹ This rapid change in media consumption is imperative to understand as schools seek to enroll online college students – essentially, how do you reach these students? This question and others that are vital to understanding, marketing to, and enrolling online college students are included in this report.

¹COMSCORE CTV Intelligence, CTV devices March 2020-2022



Among the vital data within this report, the following points represent key findings in our research:

1. When comparing undergraduate and graduate online students, the median age is very similar. It is important to note that 43 percent of online undergraduate students are under the age of 25.
2. Online college students are relatively new to the workforce, with 52 percent currently having four years or less of work experience.
3. Online college students are largely employed. Eighty percent reported employment (59 percent full time and 21 percent part time).
4. In 2023, only 35 percent of online college students were among the first in their family to attend college. This is compared with 42 percent in the 2022 Online College Students report.
5. Nearly 20 percent of online college students enrolled in Health and Medicine focused topics in 2023. This is the second largest individual topic area. This is compared to only 15 percent in our 2022 survey, where it ranked third. Health and Medicine now outranks Computers and IT as a field of study, after being 10 points behind Computers and IT in 2022.
6. Forty percent of undergraduate online college students did not complete their program the last time they were enrolled in study.
7. Graduate online students are more likely to stay in their current employment field than undergraduate online students. Additionally, graduate students are far more likely to enroll in a program that is directly related to their current employment (51%) than undergraduate online students (40%).
8. According to timeframes cited by online college students, the key timeframe to attract a student to reenroll in a program once they stop out is within one year.
9. Sixty percent of online college students expect to begin their studies within one month of their acceptance.
10. Nearly 90 percent of online college students utilize a smartphone to access streaming media. Online college students utilize free audio/music/radio streaming subscriptions more often than they do free video streaming subscriptions (with the exception of YouTube).
11. Online college students most often use YouTube, Netflix, Hulu, and Spotify daily.



12. Online college students most often have profiles or accounts on Instagram and Facebook. Similarly, when considering social media platforms used to search for information about a school, Facebook and Instagram are the most often cited platforms.
13. Forty-three percent of online college students follow schools of interest on social media.
14. A plurality of online college students did not recall seeing any outdoor billboards advertising schools.
15. Overall, online college students found it difficult to find the information they seek on college websites.
16. The most important decision-making factor for online college students is the cost of tuition and fees. However, only 24 percent of online college students found it very easy to find college fees on college websites and only 30 percent found it very easy to find tuition costs on college websites.
17. The most influential recruitment activities are events in which there is a direct connection made between faculty/staff and potential students. The two most influential marketing activities in school selection were in-person events (38%) followed by online events (such as webinars, online tours, online social events), which were cited by 35% of respondents.
18. Attracting students to websites is key. Methods of initial inquiry are often web-based. One-quarter of respondents indicated their initial inquiry method was through a college website information form. Another 20 percent indicated they were a stealth applicant, as their initial inquiry method was through application submission. Another 15 percent inquired initially via email. All of these are inquiry methods that are utilized by students being driven to institution websites.
19. About 70 percent of online college students indicated they commenced their school selection process via a visit to the school's website (which can be found on search engines). Seventy percent indicated their school search selection began on search engines specifically. Twenty-five percent of respondents indicated that search engines were influential in their enrollment decision.
20. Nearly half of respondents prefer schools to contact them through email. However, it is important to note that while preferable, it was cited by only 11 percent of respondents as influential in their enrollment decision. As such, a mix of contact methods must be used to attract students to institutions such as more influential events.

Section 1:

Who are they? Demographics and Attributes of Online College Students

Undergraduate online college students are most often single, white women between 19-23 years of age who are not of Hispanic, Latino, or Spanish origin and have no children living at home. About half are employed full time, the largest proportions having up to six years' work experience, with a median household income of \$51,250. They are not the first in their family to enroll in college and about half live in suburban areas throughout the country. The vast majority enroll in their state of residence.

Graduate online college students are most often white women between 30-35 years of age who are not of Hispanic, Latino, or Spanish origin, about half of whom are single with no children living at home. They are employed full time, with up to six years of work experience and have a median household income of \$64,600. They are not the first in their family to enroll in college and live in suburban areas throughout the country. The vast majority enroll in their state of residence.

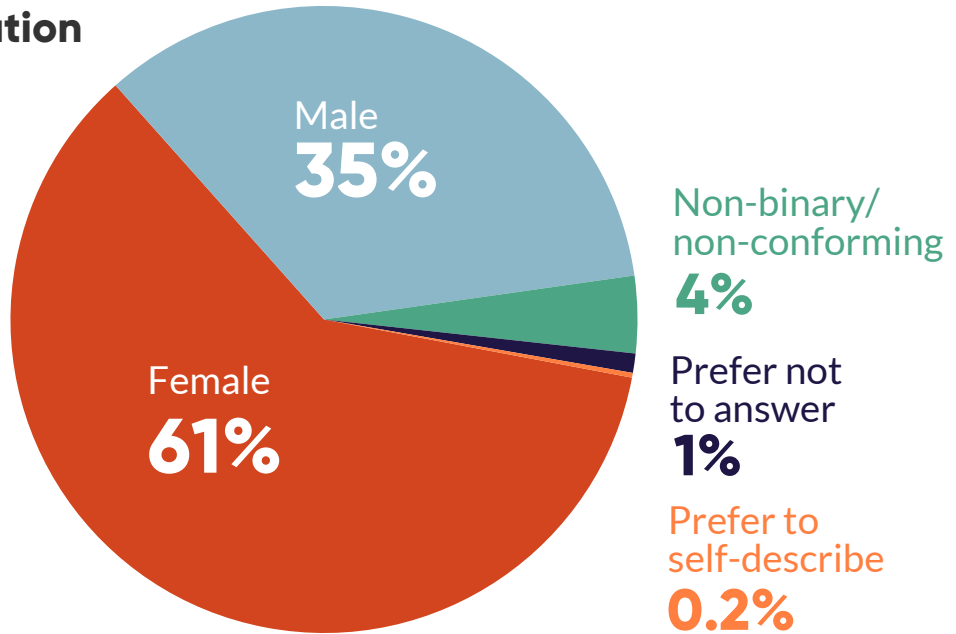




Gender

Women dominate both the undergraduate and graduate online college student populations, making up almost two-thirds of the population. Four percent of the online college market identify as non-binary.

Gender Distribution





Age

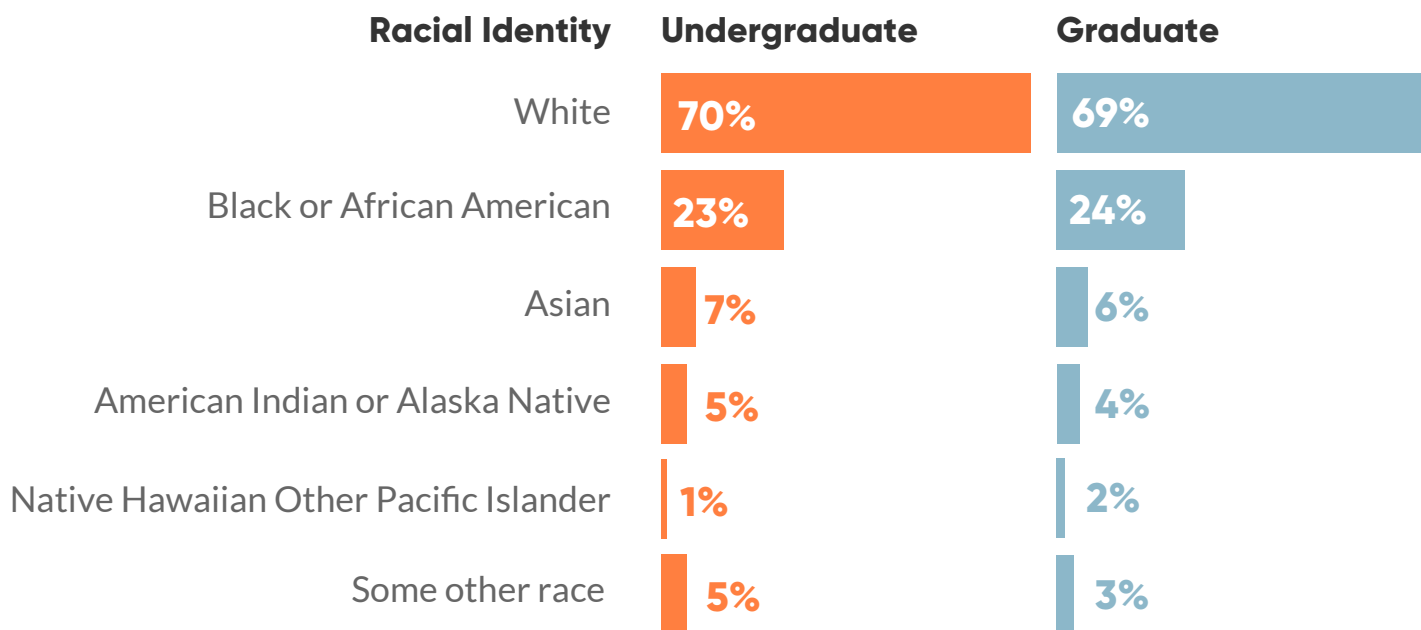
Online college students are essentially 35 years of age or younger. About 45 percent of undergraduate online students, and 30 percent of graduate online students, are under 25 years of age. The undergraduate online student population is widely distributed by age, but the largest proportion, 35 percent, is between 19 and 23 years of age. The largest proportion of graduate online students, 42 percent, is between 30 and 35 years of age.

Age	Total	Undergraduate	Graduate
18 or younger	3%	3%	2%
19	6%	7%	5%
20	5%	7%	4%
21	5%	6%	4%
22	7%	8%	7%
23	6%	7%	4%
24	5%	5%	4%
25	6%	6%	6%
26	5%	5%	5%
27	5%	4%	5%
28	5%	5%	6%
29	5%	5%	5%
30	7%	6%	8%
31	5%	5%	6%
32	7%	6%	8%
33	5%	4%	6%
34	6%	6%	7%
35	6%	5%	7%
36	1%	0%	1%
37 or older	0%	0%	0%



Race & Ethnicity

About 70 percent of respondents identify as White. Almost 25 percent of all respondents identify as Black or African American.



Note: Respondents were asked to check all that apply.





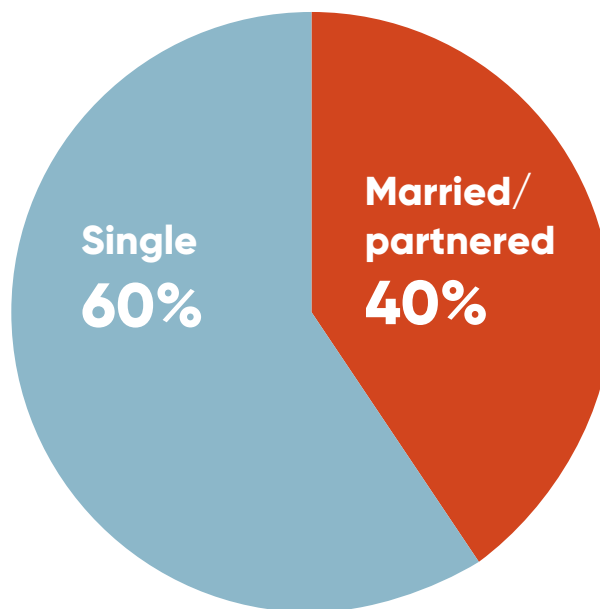
Hispanic Origin

Twenty percent of respondents identify as being of Hispanic origin, with a vast majority, over 10 percent of all respondents, identifying as Mexican, Mexican American, and/or Chicano.

Hispanic Origin	Total	Undergraduate	Graduate
No, not of Hispanic, Latino, or Spanish origin	80%	80%	79%
Yes, Mexican, Mexican American, or Chicano	11%	10%	11%
Yes, Puerto Rican	4%	4%	4%
Yes, Cuban	1%	1%	2%
Yes, another Hispanic, Latino, or Spanish origin (Salvadoran, Dominican, Colombian, Guatemalan, Spaniard, Ecuadorian, etc.)	4%	5%	4%

Marital Status

Most online college students are single. Nearly two thirds of undergraduate online students are single, while 54 percent of graduate online students are single.

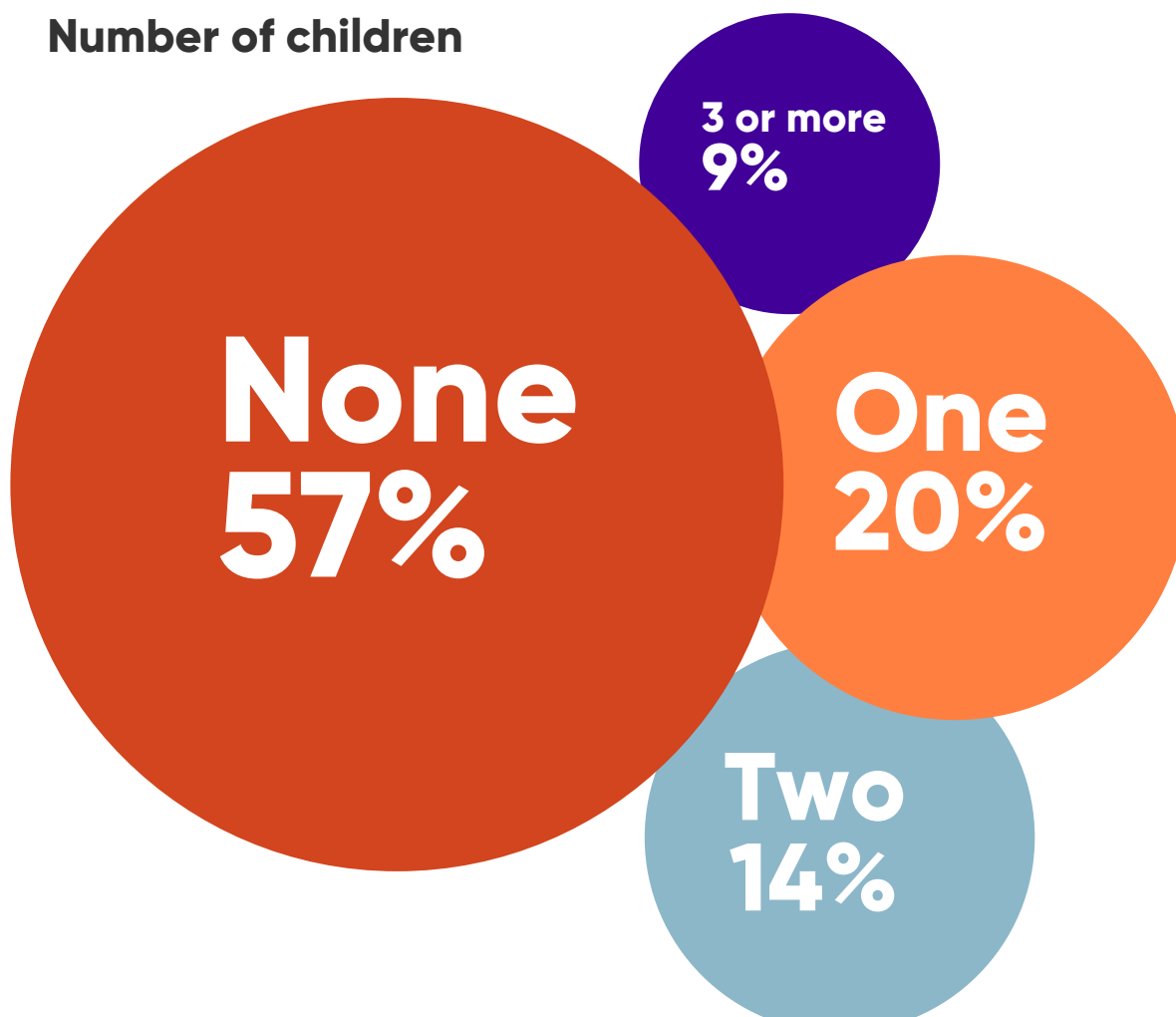




Children Under 18 In Household

More than half of the respondents to our online college student survey do not have children under the age of 18 living at home. Almost 40 percent of undergraduate students and almost 50 percent of graduate students have no children at home. Nine percent of all respondents live in households with 3 or more children in the home.

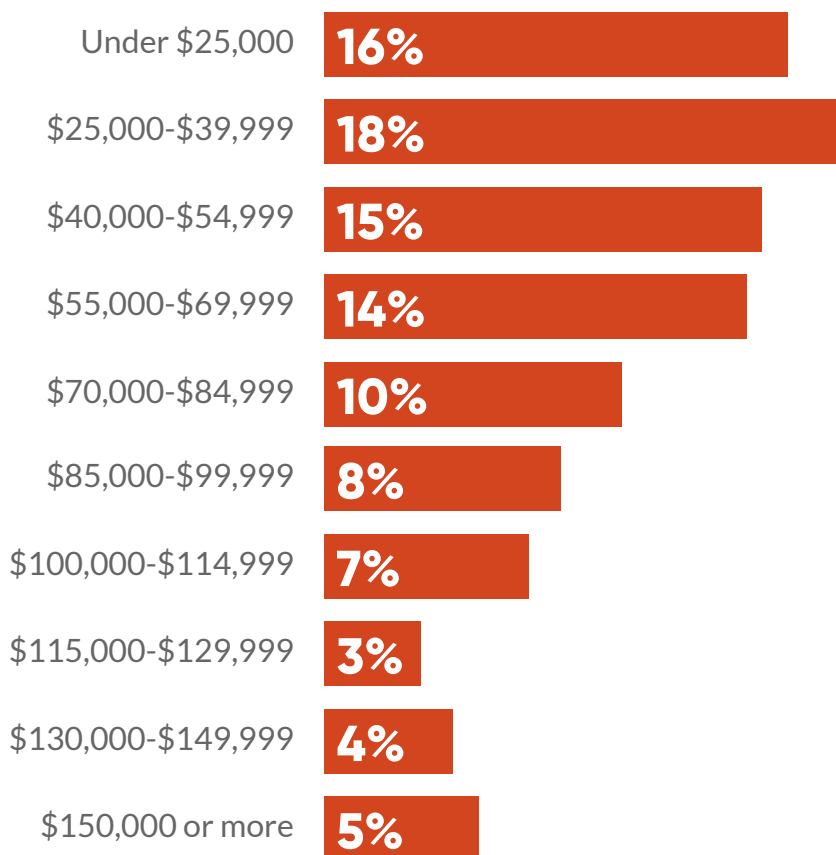
Number of children





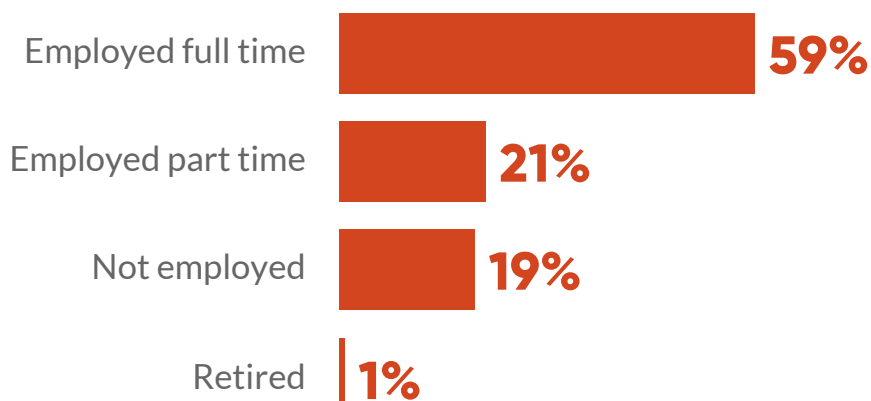
Total Household Income

The median household income for online college students is \$56,050. Among undergraduate students, the median household income is \$51,250; while among graduate students it is \$64,600.



Employment Status

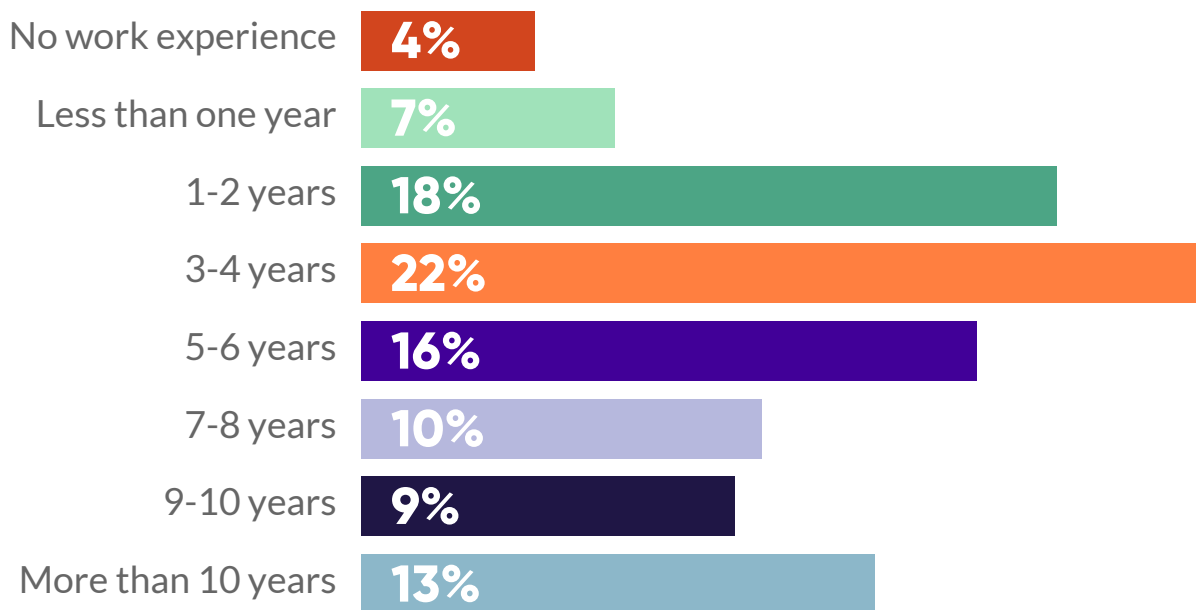
A majority of survey respondents, just shy of 60 percent of all online college students, are currently employed full time. A larger proportion of graduate online college students are employed full time (66%) than undergraduate students (52%). Note that almost one quarter of undergraduate online students are currently unemployed.





Work Experience

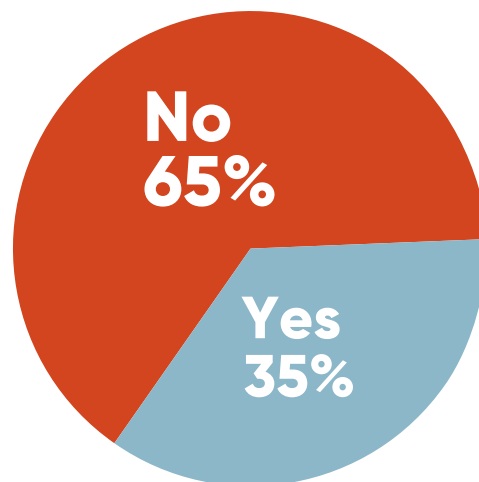
Online college students have significant work experience. Seventy percent of all online college students reported having three or more years of work experience. Among undergraduate students, 68 percent reported having four or more years of work experience, while 72 percent of graduate students reported having three or more years of work experience.





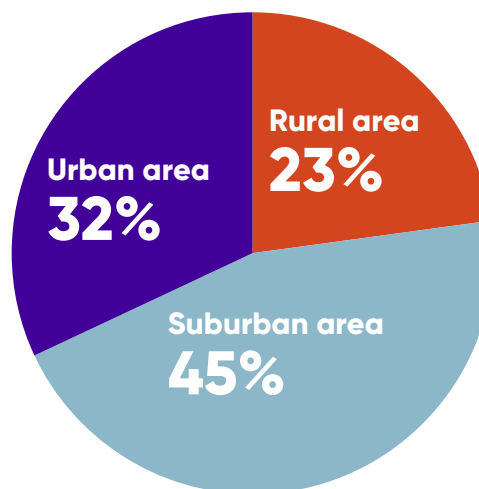
First in Family to Attend College

Most respondents come from families with prior college experience. Almost two thirds of respondents are not the first in their family to attend college. That proportion is only slightly lower among graduate students (62%) than undergraduate students (66%).



Location

The largest proportion of online college students, 45 percent, reside in suburban areas, while 32 percent reside in urban areas. Only 23 percent of students live in rural areas. The location does not vary significantly between undergraduate and graduate students.





State of Residence

Respondents live in various parts of the country. California, Texas, Florida and New York claim the largest number of online students.

State of Residence	Total	Undergraduate	Graduate
California	11%	10%	11%
Texas	9%	9%	9%
Florida	7%	7%	7%
New York	6%	6%	6%
Georgia	5%	5%	5%
Michigan	4%	4%	3%
Ohio	4%	4%	4%
Pennsylvania	3%	3%	4%
Illinois	3%	3%	4%
Virginia	3%	4%	3%
North Carolina	3%	3%	3%
Tennessee	3%	3%	3%
New Jersey	3%	3%	2%
Arizona	3%	3%	2%
Alabama	2%	2%	2%
Indiana	2%	2%	2%
Maryland	2%	1%	3%
Massachusetts	2%	2%	2%
Wisconsin	2%	1%	2%
Colorado	2%	2%	1%
Missouri	2%	2%	2%
Louisiana	2%	2%	1%
Washington	2%	2%	1%
Kentucky	1%	2%	1%
Oklahoma	1%	2%	1%
Oregon	1%	1%	2%
South Carolina	1%	1%	2%
Arkansas	1%	1%	1%
Connecticut	1%	1%	1%
Minnesota	1%	1%	1%
Utah	1%	1%	1%
Iowa	1%	1%	1%
Nevada	1%	1%	1%
Mississippi	1%	1%	1%
West Virginia	1%	1%	1%
Kansas	1%	1%	0%
New Mexico	1%	1%	1%
Hawaii	1%	1%	0%
Idaho	1%	1%	1%
Nebraska	1%	1%	1%
Maine	0%	1%	0%
Washington, D.C.	0%	0%	1%



Enrolled in State of Residence

The vast majority of online college students enroll in their state of residence.

Enrolled in State of Residence	Total	Undergraduate	Graduate
Yes	82%	82%	82%
No	18%	18%	18%



Average Age of Respondent

Undergraduate

27
years old

Graduate

28
years old



Average Number of People Enrolled in College Study within Household

1.3
people



State of Enrollment

Arizona is the state with the largest number of enrolled online students in Arizona, followed by Florida, California and New Hampshire. Undergraduate online students most often enroll in Arizona and New Hampshire, while graduate online students most often enroll in Arizona and Florida.

Although the largest proportions of respondents live in California, followed by Texas, Florida, and New York, these data suggest that institutions based in Texas and New York enroll individuals who reside out of state.

State of Enrollment	Total	Undergraduate	Graduate
Arizona	12%	11%	13%
Florida	8%	6%	10%
California	7%	6%	7%
New Hampshire	6%	7%	5%
New York	5%	4%	6%
Colorado	4%	6%	3%
Georgia	4%	2%	5%
Pennsylvania	4%	3%	5%
Utah	4%	5%	2%
Virginia	4%	4%	3%
Ohio	3%	4%	3%
Connecticut	2%	2%	2%
Illinois	2%	2%	2%
Kansas	2%	2%	2%
Maryland	2%	1%	3%
Massachusetts	2%	1%	2%
Minnesota	2%	1%	4%
North Carolina	2%	2%	2%
Oklahoma	2%	2%	2%
Tennessee	2%	3%	1%
Texas	2%	2%	2%
Alabama	1%	1%	1%
Arkansas	1%	1%	2%
Delaware	1%	1%	1%
Idaho	1%	1%	0%
Indiana	1%	1%	2%
Iowa	1%	1%	0%
Kentucky	1%	0%	2%
Louisiana	1%	1%	1%
Maine	1%	1%	0%
Michigan	1%	0%	2%
Mississippi	1%	1%	1%
Missouri	1%	1%	0%
Nebraska	1%	1%	1%
New Jersey	1%	2%	0%
New Mexico	1%	0%	1%
Oregon	1%	1%	1%
Rhode Island	1%	1%	0%
South Carolina	1%	2%	1%
South Dakota	1%	0%	1%
Washington	1%	1%	0%
Washington, D.C.	1%	1%	0%
West Virginia	1%	1%	0%
Wisconsin	1%	1%	1%
Montana	0%	0%	1%

Section 2:

What, Why & Where College Students Study

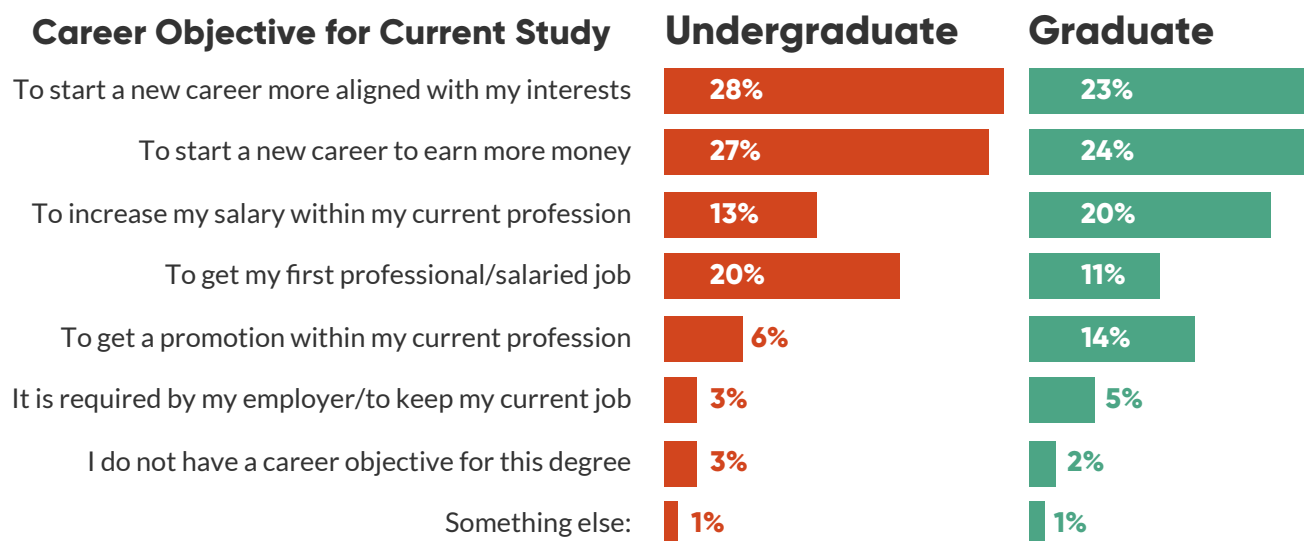
When evaluating career objectives, over 50 percent of respondents enroll primarily to start a new career, with that being broken down almost equally between starting a new career more aligned with their interests (26%) and starting a new career to earn more money (25%). This is followed by motivation to increase their salary within their current profession (16%) and motivation to get their first professional/salaried job (15%).

However, data among undergraduate and graduate online students diverge among these latter two objectives. While 20 percent of graduate students enroll to increase their salary within their current profession, only 13 percent of undergraduates do so. And, while 20 percent of undergraduate students enroll to get their first professional/salaried job, only 11 percent of graduate students reported this as their primary objective.





Note also that 14 percent of graduate students enroll to get a promotion within their current profession, while only seven percent of undergraduate students do so. This is a logical outcome given the typical age difference (and therefore years of work experience) among undergraduate and graduate online students.



Type of Study

Online college students, more often than not, are engaged in degree study. However, there is disparity among study types between undergraduate and graduate students. Eighty percent of undergraduate online students were enrolled in degree study, while 70 percent of graduate online students were enrolled in degree study. Thus, graduate online students are more likely to enroll in certificate study (31%) than their undergraduate counterparts (20%).

Program Type	Undergraduate	Graduate
Associate Degree	32%	--
Bachelor's Degree	48%	--
Master's Degree	--	62%
Doctoral Degree	--	8%
Certificate/License	20%	31%



Subject Field of Study

Online college students most often study business (22%), followed by health, nursing, & medicine (19%), and computers & IT (17%.) Together, these three fields comprise almost 60 percent of the online college student market. Data for these top three subjects of study among undergraduate and graduate online students are quite similar, revealing only the smallest of discrepancies (between 1-3%.)

However, some fields of study vary significantly when comparing undergraduate and graduate enrollment. Ten percent of undergraduate students choose to enroll in STEM programs and another 10 percent are seeking programs in social sciences, criminal justice and law. In comparison, significantly fewer students study STEM (6%) or social sciences, criminal justice and law (6%) fields. In contrast, education and teaching fields garner 11 percent of graduate students as compared to only seven percent of undergraduate students.

Subject Area of Study	Total	Undergraduate	Graduate
Arts & Humanities	10%	11%	9%
Business	22%	21%	23%
Computers & IT, Technology	17%	16%	19%
Counseling, Human Services	5%	5%	6%
Education & Teaching	9%	7%	11%
Health, Nursing & Medicine	19%	20%	19%
Science, Technology, Engineering, or Mathematics	8%	10%	6%
Social Sciences, Criminal Justice, Law	8%	10%	6%



Subject Field Related to Employment

Among the approximately 80 percent of online college students who are employed, 40 percent of undergraduate online students and about half of graduate online students are studying a subject that is directly related to their employment. Another 33 percent of online college students are studying a subject that is somewhat related but not directly related to their employment field.

Subject Field Related to Employment	Total	Undergraduate	Graduate
Directly related	46%	40%	51%
Somewhat related but not directly related	33%	34%	32%
Not at all related	21%	26%	16%

Preferred Delivery of Online Program

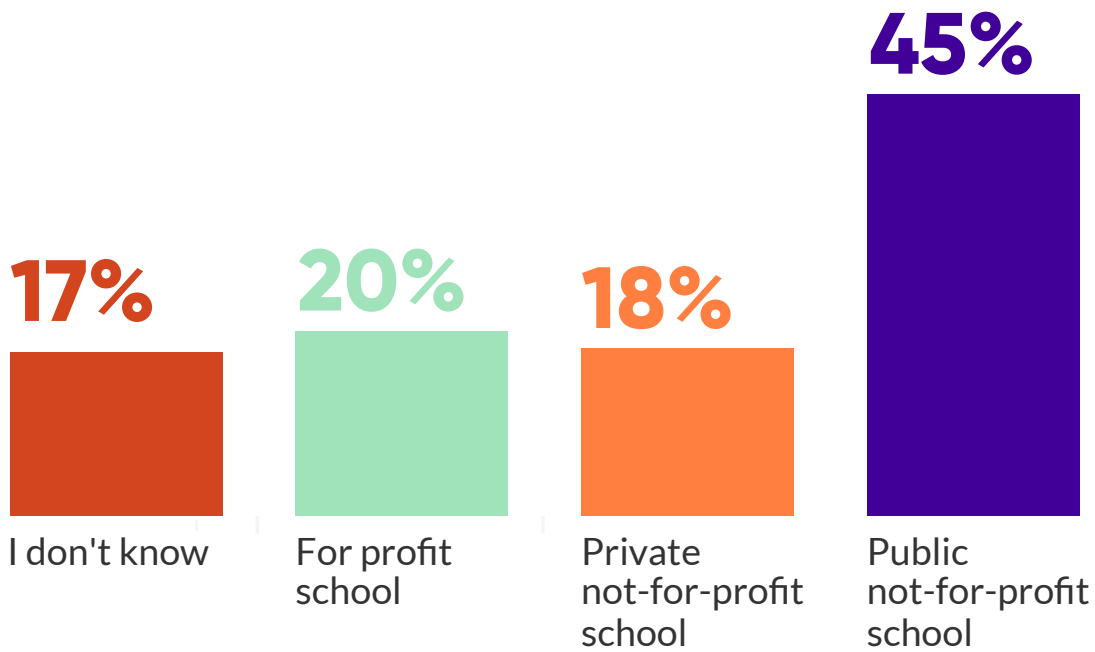
A majority of online college students, almost 60 percent, prefer to enroll in asynchronous online courses; those they can log into/access at any time. The remaining respondents are equally split between a preference for synchronous study and a combination of asynchronous and synchronous study (both 21%.) There is not a strong difference in preference between undergraduate and graduate students.

Preferred Delivery of Online Program	Total	Undergraduate	Graduate
On my own (viewing course sessions when I am able (asynchronous))	58%	60%	57%
At a set time, together with my classmates (synchronous)	21%	18%	23%
A combination of synchronous and asynchronous learning	21%	22%	21%



Enrollment by School Type

Just under half on online college student respondents, 45 percent, are, or intend to enroll, at a public, not-for-profit school. The remaining respondents are rather equally split between enrolling in a for-profit school (20%) or a private, not-for-profit school (18%).





Number Enrolled in College Program at Time of Enrollment: Future Students

Among those who plan to enroll in online college-level study soon, 78 percent said that they, themselves, are the person in their household who is currently enrolled or will be enrolled in college-level study within the next year.

Number in Household Enrolled in College Program at Time of Enrollment: Future Students	Total	Undergraduate	Graduate
Just myself	78%	78%	78%
2	13%	14%	13%
3	4%	4%	4%
4	3%	3%	3%
5 or more	2%	1%	3%

Number Enrolled in College Program at Time of Enrollment: Current & Past Students

Among those currently enrolled in online college-level study, or have been very recently, about 65 percent said that they, themselves, were the person in their household who is currently enrolled or will be enrolled in college-level study within the next year. Another 20 percent said two people in their household are currently enrolled or will be enrolled in college-level study within the next year.

Number in Household Enrolled in College Program at Time of Enrollment: Future Students	Total	Undergraduate	Graduate
Just myself	78%	78%	78%
2	13%	14%	13%
3	4%	4%	4%
4	3%	3%	3%
5 or more	2%	1%	3%



PRIOR COLLEGE EXPERIENCE

Time Elapsed Since Previous Post-Secondary Study

Among online college students, over 90 percent have previously been enrolled in college study. Over half of respondents, about 60 percent, were enrolled in post-secondary study within the past two years. The largest proportion of undergraduate online students, 25 percent, were enrolled within the last year. Rather equal proportions of graduate online students were last enrolled less than one year ago (22%), one year ago (20%), or two years ago (21%.) Only 21 percent of returning online students are returning to school after four or more years.

Time Since Last Enrollment

I have not been previously enrolled in study	7%
Less than 1 year	23%
1 year	17%
2 years	20%
3 years	10%
4 years	6%
5 or more years	13%

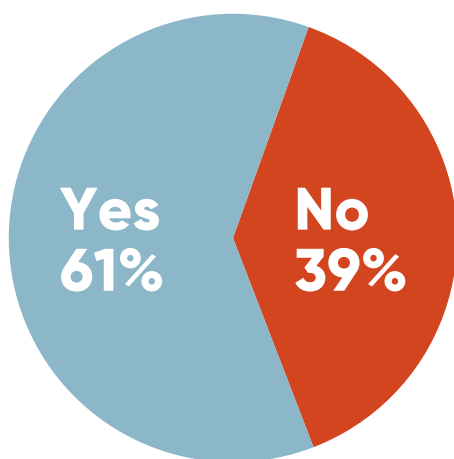




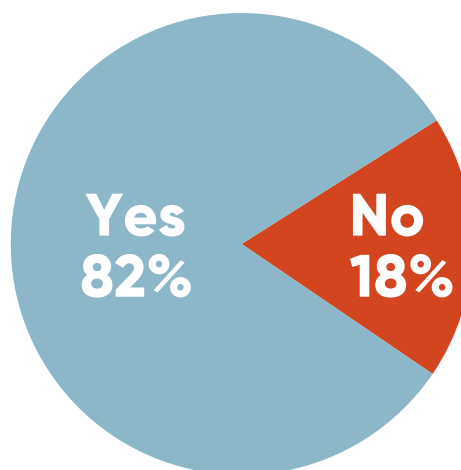
Completed Program When Last Enrolled

Among those respondents who had previously enrolled in post-secondary study, most completed their prior program. As expected, it is much more likely the case that graduate students (82%) completed their last program of study. However, a majority of undergraduate students (61%) also reported having completed their last program of study.

Undergraduate

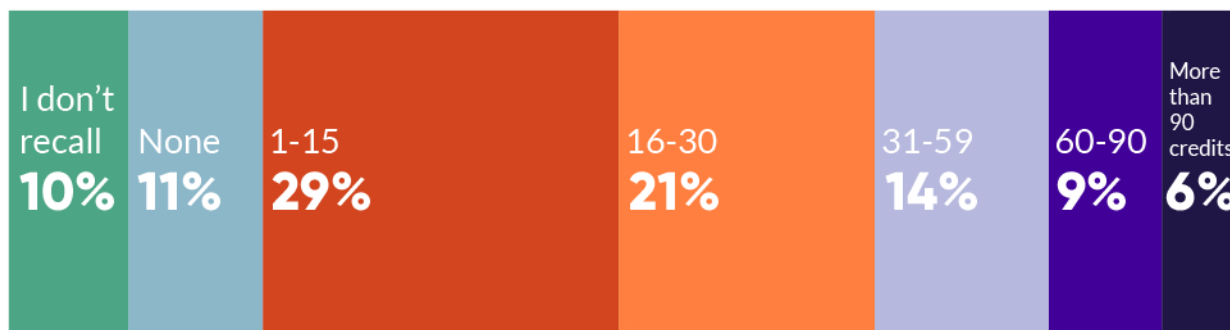


Graduate



Number of Undergraduate Credits Earned

Undergraduate online students who had previously enrolled in post-secondary study, but did not complete their program, earned various quantities of undergraduate credits. The largest proportion, about 30 percent, earned between 1-15 credits, while an additional 21 percent earned 16-30 credits.



Section 3:

How Do College Students Engage with a School's Website?

Visited School Website

Over 80 percent of online college students visited the websites of institutions while researching schools for online study.

Visited School Websites	Total	Undergraduate	Graduate
Yes	87%	88%	87%
No	13%	12%	13%





Information Sought on School Website

Online college students rely heavily on school websites for an abundance of information. A vast majority of students, 67 percent, sought information associated with the cost of tuition. In addition, most prospective students seek out information about the availability of programs (63%) and the cost of fees (61%.) About half looked for the course listings, the program start dates, the program curriculum, and scholarship information.

Information Sought on School Websites

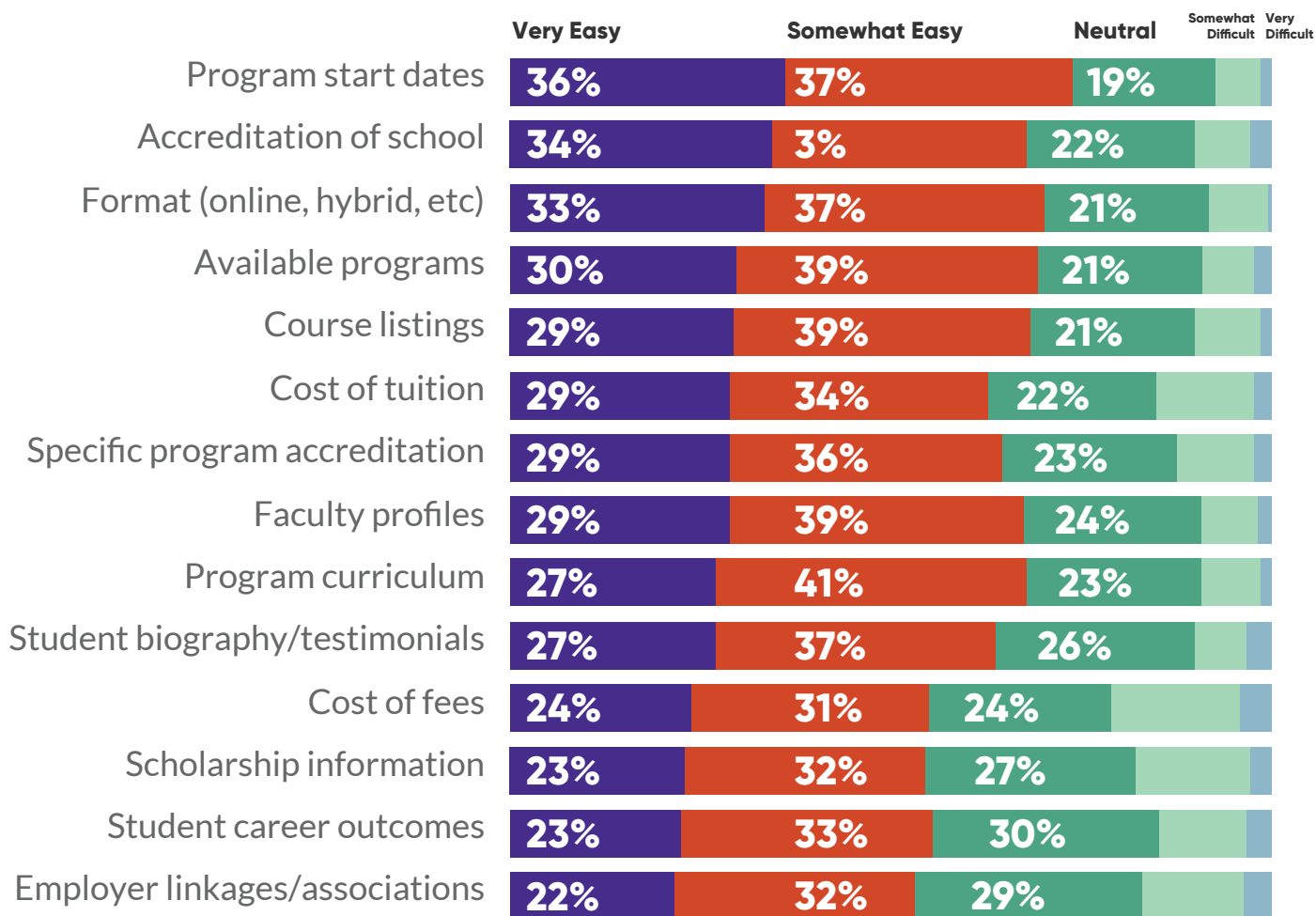
	Total	Undergraduate	Graduate
Cost of tuition	67%	69%	65%
Available programs	63%	65%	60%
Cost of fees	61%	64%	58%
Course listings	51%	54%	47%
Program start dates	48%	47%	48%
Program curriculum	45%	45%	44%
Scholarship information	45%	45%	46%
Format (online, hybrid, etc.)	37%	37%	37%
Student career outcomes	34%	33%	34%
Accreditation of school	34%	36%	33%
Specific program accreditation	31%	30%	31%
Student biography/testimonials	16%	14%	18%
Faculty profiles	16%	13%	19%
Employer linkages/associations	14%	11%	16%



Website Ease of Use: Total

Respondents do not find it very easy to find the information they most often seek on school websites. As for what was very easy for them to find: just over one third, 36 percent, could very easily find the program start dates on the institutional websites they consulted – this was the most commonly identified piece of information. The most sought-after information (cost, availability, and course listings) was very easy to find for fewer than one third of respondents.

Ease of Finding Topics on School Website





Ease of Finding Information on Website: Undergraduate

Reviewing only undergraduate online student data, generally speaking, prospective students do not find it very easy to find desired information on school websites. School accreditation was very easy to find for only 38 percent of students, making it the easiest piece of information for respondents to find. Critical information like cost of tuition and fees, program curriculum, and career outcomes, were all very easy to find for less than 30 percent of website users.

Ease of Finding Information on Website: Undergraduate	Very Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Very Easy
Accreditation of school	4%	9%	22%	28%	38%
Program start dates	1%	6%	18%	39%	37%
Format (online, hybrid, etc.)	0%	8%	23%	37%	33%
Available programs	2%	7%	22%	39%	30%
Course listings	2%	9%	20%	39%	30%
Cost of tuition	3%	13%	21%	35%	28%
Student biography/testimonials	3%	7%	25%	38%	27%
Faculty profiles	1%	8%	27%	37%	27%
Program curriculum	1%	9%	25%	41%	25%
Specific program accreditation	2%	12%	24%	37%	25%
Cost of fees	4%	17%	26%	29%	24%
Student career outcomes	2%	12%	29%	34%	23%
Scholarship information	3%	15%	28%	34%	21%
Employer linkages/associations	2%	15%	32%	30%	21%



Ease of Finding Information on Website: Graduate

Graduate students also did not find it very easy to locate critical information on school websites. Among the information that was very easy to find, program start dates were cited by the largest proportion, 36 percent, followed by format, 34 percent, specific program accreditation, 33 percent, and the accreditation of the school, 31 percent. Fifteen percent of students found it somewhat or very difficult to find cost of tuition information, while 18 percent found it somewhat or very difficult to find information on cost of fees. Only 23 percent of prospective graduate students found it very easy to find information about student career outcomes.

Ease of Finding Information on Website: Graduate	Very Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Very Easy
Program start dates	2%	5%	20%	36%	36%
Format (online, hybrid, etc.)	1%	8%	20%	37%	34%
Specific program accreditation	2%	8%	22%	35%	33%
Accreditation of school	2%	6%	22%	40%	31%
Program curriculum	1%	7%	22%	40%	30%
Cost of tuition	2%	13%	23%	32%	30%
Faculty profiles	2%	7%	21%	39%	30%
Available programs	3%	7%	21%	40%	29%
Course listings	1%	9%	23%	39%	29%
Student biography/testimonials	3%	6%	28%	36%	27%
Scholarship information	3%	15%	27%	30%	25%
Cost of fees	4%	17%	22%	33%	24%
Student career outcomes	4%	11%	31%	32%	23%
Employer linkages/associations	5%	12%	27%	33%	22%



Most Important Information on School Website

When respondents were asked what was most important for them to find on a school’s website, the most commonly cited information sought included cost of tuition and available programs, at 26 percent and 21 percent, respectively.

Most Important Information on School Websites

	Total	Undergraduate	Graduate
Cost of tuition	26%	27%	24%
Available programs	21%	22%	20%
Cost of fees	8%	8%	8%
Scholarship information	7%	6%	7%
Format (online, hybrid, etc.)	7%	6%	7%
Program curriculum	6%	5%	7%
Course listings	6%	7%	6%
Accreditation of school	5%	5%	4%
Student career outcomes	4%	4%	4%
Specific program accreditation	3%	3%	3%
Program start dates	3%	4%	3%
Student biography/testimonials	2%	1%	2%
Employer linkages/associations	2%	1%	2%
Faculty profiles	1%	1%	1%

Section 4:

The Impact of Social Media

Social Media Platform Usage

Almost all online college students use social media platforms. About 75 percent use Instagram or Facebook. About 60 percent use TikTok, about 55 percent use Snapchat, and almost half use Twitter.

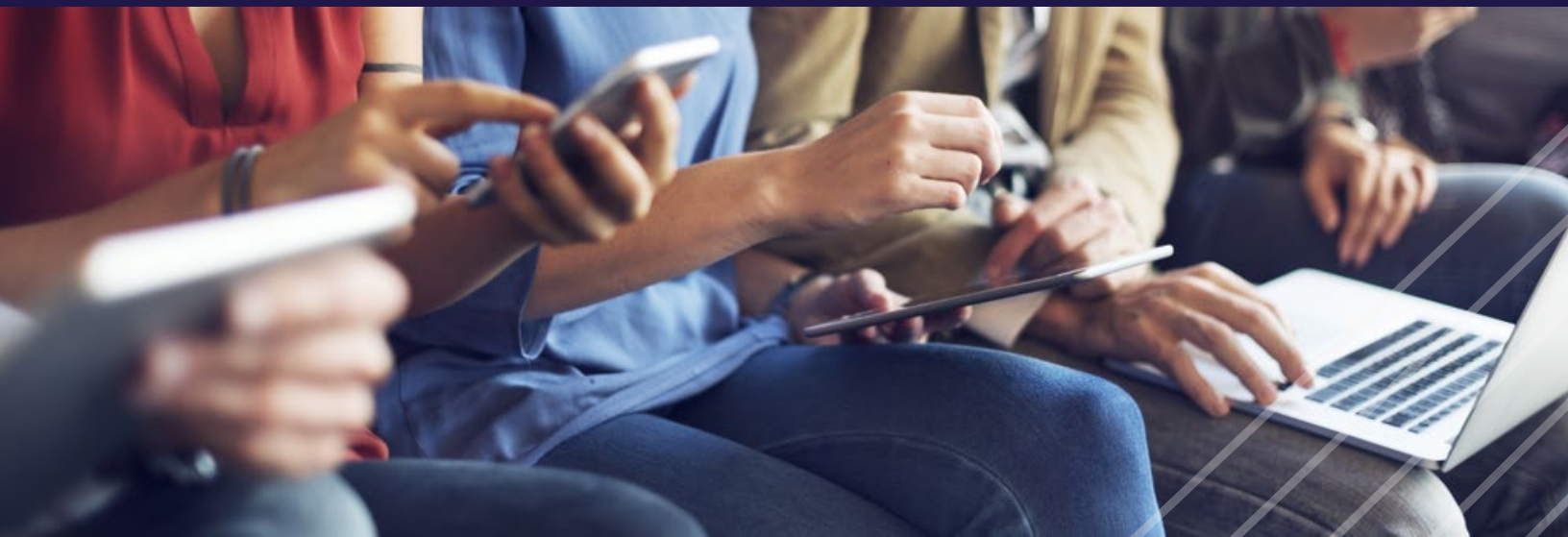
Social Media Platform Usage	Total	Undergraduate	Graduate
Instagram	76%	76%	75%
Facebook	73%	71%	75%
TikTok	62%	64%	60%
Snapchat	57%	58%	56%
Twitter	48%	46%	50%
Pinterest	40%	40%	40%
Reddit	30%	30%	30%
LinkedIn	29%	26%	31%
Discord	26%	26%	26%
Twitch	20%	20%	21%
Patreon	6%	5%	6%
Another platform	2%	2%	2%
I do not use any social media	1%	1%	1%



Social Media Access by Devices

Almost all online college students who utilize social media platforms access their social media accounts on their smartphone. Interestingly, almost 60 percent also access social media platforms on their computer.

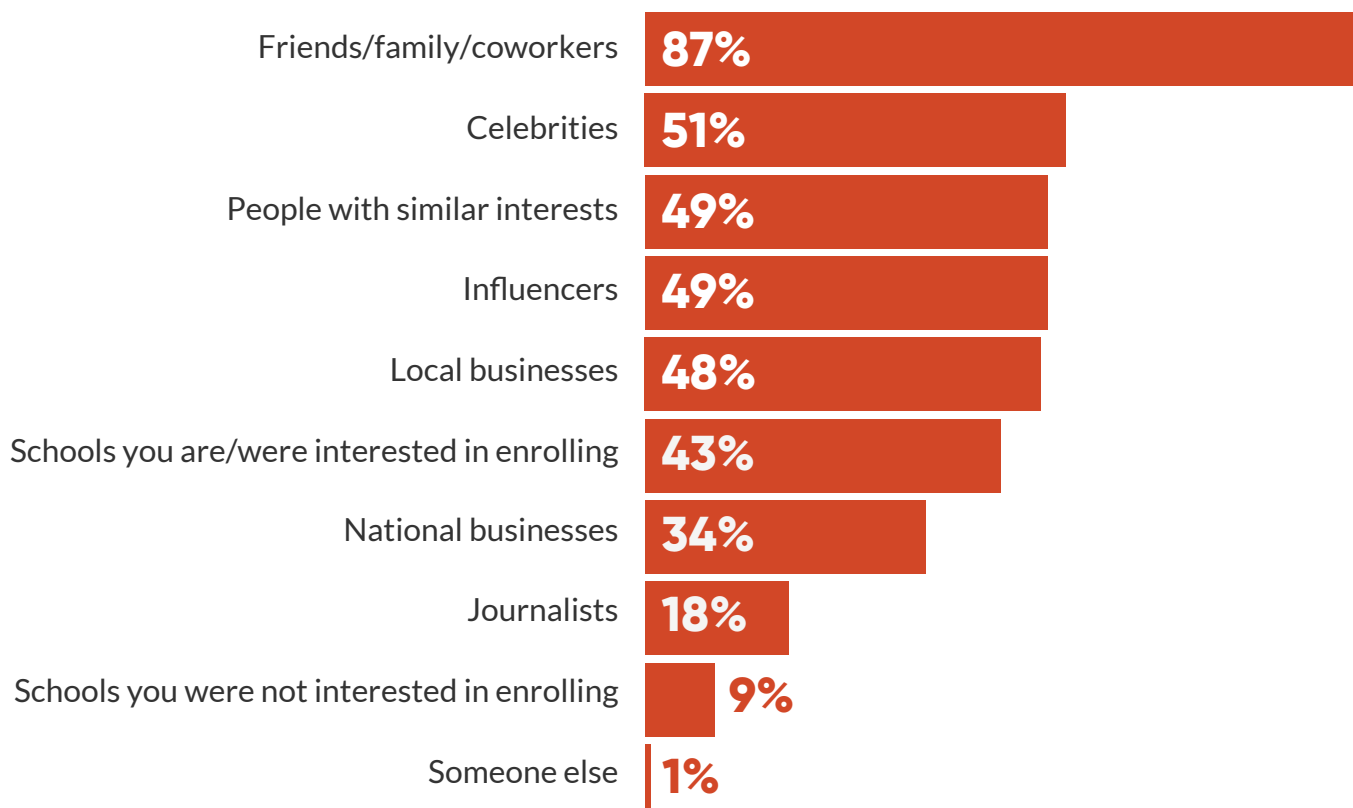
Social Media Access Devices	Total	Undergraduate	Graduate
Smartphone	95%	96%	95%
Computer	59%	56%	62%
Tablet	26%	25%	28%





Social Media Follows

The vast majority of online college students who utilize social media, 87 percent, do so to follow friends, family, and coworkers. Additionally, a significant proportion of respondents follow either celebrities, influencers, people with similar interests, or local businesses. Note that 43 percent follow schools in which they are interested in enrolling.





Behavior on Social Media

Over half of online college students who utilize social media most often prefer to view posts on their feed. Thirty-one percent view posts on both their feed and in their stories in equal proportion.

Behavior on Social Media	Total	Undergraduate	Graduate
View your feed more often	51%	52%	50%
View stories more often	19%	18%	20%
View stories and your feed	31%	31%	30%

Purchases and Social Media

Only 13 percent of social media users reported not using social media to make a purchase or complete a Request for Information form. About 60 percent of online college students utilize social media for purchases after also researching the item on Google or some other search engine before completing a transaction. Another 27 percent forgo that extra research and make a purchase or fill out a form directly from the social media link.

Purchases on Social Media	Total	Undergraduate	Graduate
Search item on Google or other search engine before making purchase or completing a form	61%	62%	59%
Purchase directly or fill out form from social media link	27%	24%	29%
I have not made a purchase of anything, nor have I completed a form for anything I have seen on social media	13%	14%	11%



Frequency of Social Media Usage: Total

Among online college students who use social media, respondents use social media quite often; most respondents do so on several platforms on a daily basis. The largest proportions of platform-specific users use, on a daily basis, TikTok (77%), Facebook (76%), Instagram (74%) or Snapchat (70%.)

Frequency of Social Media Usage: Total	Daily	Weekly	Monthly	Less Than Once Per Month
TikTok	77%	16%	5%	2%
Facebook	76%	17%	5%	2%
Instagram	74%	20%	5%	2%
Snapchat	70%	23%	5%	2%
Twitter	58%	30%	10%	3%
Discord	54%	30%	12%	4%
Reddit	48%	37%	12%	3%
Twitch	44%	34%	17%	6%
LinkedIn	41%	35%	13%	10%
Pinterest	40%	39%	17%	5%
Patreon	31%	34%	24%	10%



Frequency of Social Media Usage: Undergraduate

TikTok, Facebook, Instagram and Snapchat are accessed daily by between 70 and 80 percent of undergraduate online students.

Frequency of Social Media Usage: Undergraduate	Daily	Weekly	Monthly	Less Than Once Per Month
TikTok	79%	15%	5%	2%
Facebook	77%	17%	5%	2%
Instagram	74%	20%	5%	1%
Snapchat	70%	23%	5%	2%
Twitter	57%	30%	10%	3%
Discord	53%	31%	11%	5%
Reddit	46%	39%	12%	2%
Twitch	43%	32%	16%	8%
LinkedIn	38%	34%	15%	13%
Pinterest	38%	38%	20%	4%
Patreon	25%	39%	24%	11%



Frequency of Social Media Usage: Graduate

Among graduate online students who utilize specific social media platforms, TikTok, Facebook, Instagram, and Snapchat are accessed by between 69 to 76 percent of users every day.

Frequency of Social Media Usage: Graduate	Daily	Weekly	Monthly	Less Than Once Per Month
TikTok	76%	18%	5%	2%
Facebook	75%	17%	6%	2%
Instagram	74%	19%	5%	2%
Snapchat	69%	24%	6%	2%
Twitter	58%	29%	10%	4%
Discord	55%	29%	13%	3%
Reddit	50%	35%	13%	3%
Twitch	45%	35%	17%	4%
LinkedIn	44%	36%	11%	9%
Pinterest	41%	40%	15%	5%
Patreon	36%	31%	24%	10%





News Consumption on Social Media Platforms

Facebook is the most commonly cited social media platform for finding and reading news, with 53 percent of Facebook users stating they use the platform for such. Another 33 percent do so on Instagram while 28 percent do so on Twitter.

Social Media as a News Source

Facebook	52%
Instagram	33%
Twitter	28%
TikTok	16%
Reddit	16%
Snapchat	13%
LinkedIn	12%
Pinterest	8%
Discord	4%
Twitch	2%
Patreon	1%
Another social media network	1%
I did not find/read news articles on social media	13%



Social Media Platforms Used for Business Information

Facebook is also the most commonly used platform for gathering information about businesses, at 48 percent. Instagram (37%), Twitter (20%), LinkedIn (18%), and TikTok (17%) were also commonly cited by users as sources for information about businesses.

Social Media Platforms Used for Business Information

	Total	Undergraduate	Graduate
Facebook	48%	47%	49%
Instagram	37%	36%	37%
Twitter	20%	18%	22%
LinkedIn	18%	17%	20%
TikTok	17%	17%	17%
Reddit	11%	12%	11%
Snapchat	9%	8%	11%
Pinterest	8%	6%	9%
Discord	4%	3%	5%
Twitch	3%	2%	3%
Patreon	1%	1%	2%
I did not search for information about businesses on social media	17%	19%	16%



Social Media Platforms Used for School Information

Overall, a high percent of social media users leverage the platforms to find information about schools. Over two thirds of undergraduate online students, and almost 80 percent of graduate online students, search for information about schools on one or more social media platforms. Facebook (42%) and Instagram (32%) were most often cited as the source of information on potential schools and programs.

Social Media Platforms Used for School Information

	Total	Undergraduate	Graduate
Facebook	42%	38%	45%
Instagram	32%	30%	34%
Twitter	18%	16%	21%
TikTok	15%	13%	16%
LinkedIn	14%	12%	16%
Snapchat	10%	8%	12%
Reddit	9%	8%	11%
Pinterest	6%	5%	7%
Discord	4%	3%	4%
Twitch	2%	2%	3%
Patreon	1%	1%	2%
I did not search for information about schools on social media	27%	32%	22%



SOCIAL MEDIA IMPACT ON ENROLLMENT DECISIONS

Social Media Platforms Where Respondents “Like” or Follow Schools

The largest proportion of respondents who utilize specific social media platforms, 47 percent, “like” or follow schools on Facebook. Another 42 percent do so on Instagram.

Social Media Platforms Used for School Information	Total	Undergraduate	Graduate
Facebook	47%	44%	51%
Instagram	42%	40%	44%
Twitter	20%	18%	21%
TikTok	17%	16%	17%
LinkedIn	14%	12%	17%
Snapchat	10%	9%	12%
Reddit	6%	5%	7%
Pinterest	6%	5%	7%
Discord	4%	4%	5%
Twitch	3%	2%	3%
Patreon	2%	1%	2%
I did not search for information about schools on social media	20%	23%	16%



Helpfulness of Social Media in Application/Enrollment Decision: Total

In general, most social media platform users found ads on social media platforms as somewhat or very helpful in the decision-making process. Among specifically cited social media platforms consumed, respondents most often cited LinkedIn and Facebook (both 84%) as the most influential in their application and enrollment decision; followed by Instagram (79%), Twitter (77%), Patreon (72%) and TikTok (71%). In general, most social media platform users found ads on social media platforms as somewhat or very helpful in the decision-making process.

Helpfulness of Social Media Ads in Application/Enrollment Decision: Total	Not at All Helpful	Somewhat Helpful	Very Helpful	Saw Ads
LinkedIn	11%	47%	42%	84%
Twitter	18%	42%	41%	77%
Facebook	12%	50%	38%	84%
Patreon	23%	40%	38%	72%
Instagram	16%	46%	37%	79%
TikTok	24%	39%	37%	71%
Twitch	31%	32%	37%	65%
Reddit	23%	41%	36%	69%
Discord	34%	33%	34%	63%
Pinterest	35%	36%	29%	61%
Snapchat	37%	35%	28%	67%



Helpfulness of Social Media in Application/ Enrollment Decision: Undergraduate

Turning to undergraduate data only, the majority who use specific social media platforms (and may or may not “like” or follow schools) recall seeing ads for schools on the platforms they access. In general, a majority of prospective students rated the platforms as somewhat or very helpful.

Helpfulness of Social Media Ads in Application/ Enrollment Decision: Undergraduate

	Not at All Helpful	Somewhat Helpful	Very Helpful	Saw Ads
Facebook	14%	51%	35%	81%
LinkedIn	13%	49%	38%	79%
Instagram	17%	49%	34%	76%
Twitter	21%	42%	36%	73%
Patreon	33%	31%	37%	69%
TikTok	26%	41%	33%	67%
Reddit	26%	44%	31%	64%
Twitch	35%	30%	34%	62%
Snapchat	42%	34%	25%	62%
Discord	39%	29%	32%	58%
Pinterest	40%	34%	26%	55%





Helpfulness of Social Media in Application/ Enrollment Decision: Graduate

Among graduate student data, the majority who use social media platforms (and may or may not “like” or follow schools) also recall seeing ads for schools on the platforms. In general, the largest proportions find those ads somewhat helpful, and substantial proportions find them very helpful.

Helpfulness of Social Media in Application/ Enrollment Decision: Graduate

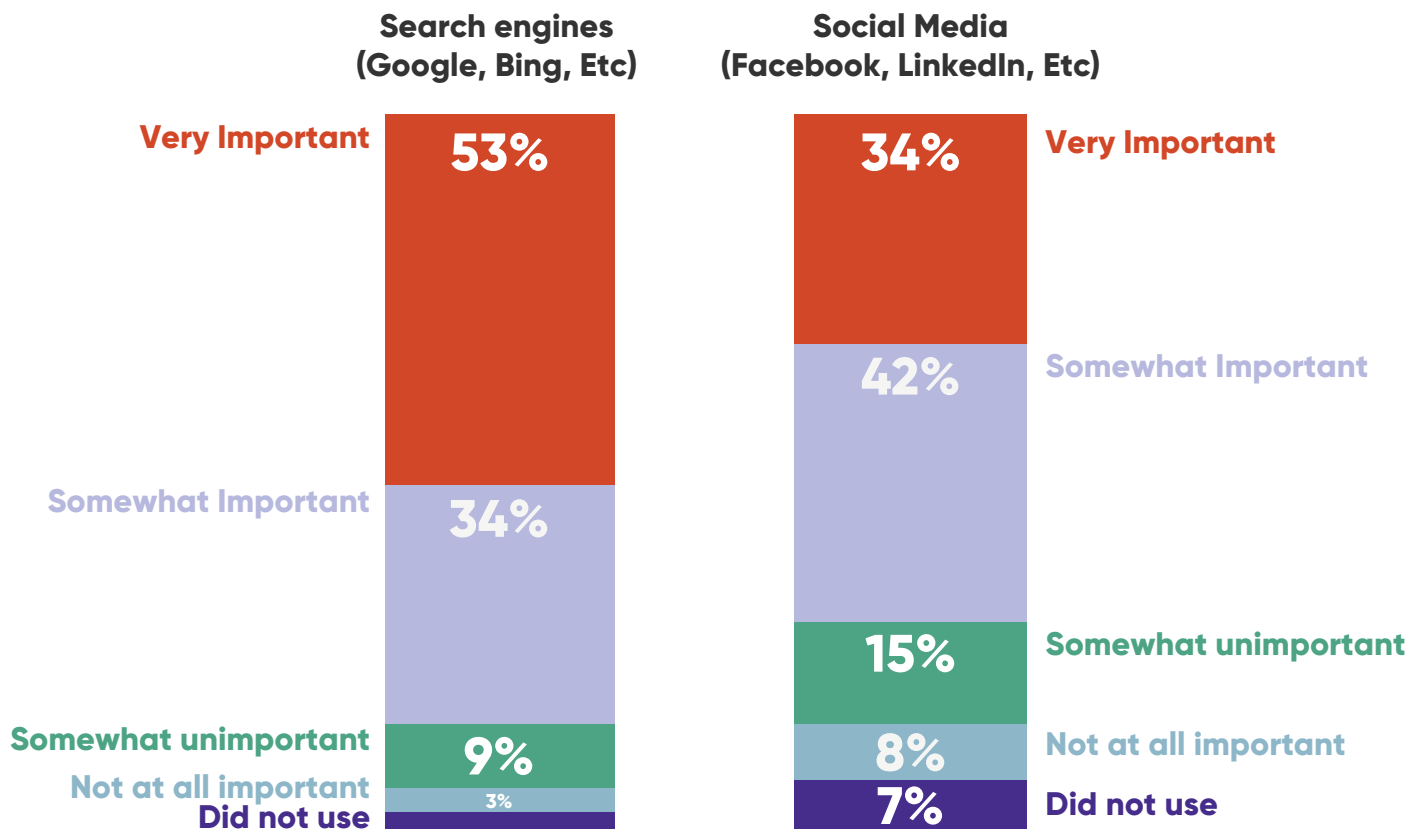
	Not at All Helpful	Somewhat Helpful	Very Helpful	Saw Ads
LinkedIn	10%	46%	44%	89%
Facebook	10%	50%	40%	87%
Instagram	16%	44%	40%	82%
Twitter	15%	41%	44%	80%
TikTok	22%	37%	41%	75%
Patreon	15%	46%	38%	75%
Reddit	22%	38%	40%	74%
Snapchat	33%	36%	32%	73%
Twitch	27%	33%	40%	68%
Discord	29%	36%	35%	67%
Pinterest	30%	38%	32%	66%





Importance of Online Reviews by Source: Total

After asking respondents to evaluate the importance of online reviews, data show that, overall, they are quite important. Reviews unearthed via search engines were very important to a majority, 52 percent, of respondents. Those found on social media accounts were somewhat important to the largest proportion, 42 percent. Note that all but a few consulted online reviews on both search engines and social media accounts.





Importance of Online Reviews by Source: Undergraduate

Data among undergraduate online students are quite similar to those reflected in the overall data; they also show the importance of online reviews. Reviews sourced by search engines were determined to be more important to users, but significant weight was also applied to reviews on social media.

Importance of Online Reviews by Source: Undergraduate	Not at All Important	Somewhat Unimportant	Somewhat Important	Very Important	Used Source
Search engines (Google, Bing, etc.)	3%	10%	34%	53%	97%
Social media (Facebook, LinkedIn, etc.)	10%	17%	42%	32%	92%

Importance of Online Reviews by Source: Graduate

Data among graduate online students are likewise quite similar. The data show the importance of online reviews, especially those found via search engines.

Importance of Online Reviews by Source: Graduate	Not at All Important	Somewhat Unimportant	Somewhat Important	Very Important	Used Source
Search engines (Google, Bing, etc.)	4%	9%	34%	54%	98%
Social media (Facebook, LinkedIn, etc.)	7%	14%	42%	37%	94%



ADVERTISEMENTS & VIDEOS ON SOCIAL MEDIA

Watch Videos on Social Media Platforms

More than half of online college students who cited specific social media usage view or watch videos on either Instagram (56%) or Facebook (55%). Approximately 50 percent do so on TikTok, and 31 percent do on Snapchat. Undergraduate online students are slightly more active on TikTok than graduate online students.

Watch Videos on Social Media Platforms	Total	Undergraduate	Graduate
Instagram	56%	56%	55%
Facebook	55%	52%	57%
TikTok	49%	52%	46%
Snapchat	31%	32%	30%
Twitter	24%	22%	26%
Reddit	11%	11%	12%
Pinterest	10%	9%	11%
Twitch	10%	10%	10%
LinkedIn	6%	4%	7%
Discord	6%	4%	7%
Patreon	2%	1%	2%
Another social media platform	2%	2%	2%
I did not view or watch videos on social media	4%	5%	4%



Video Types Viewed

Asking only those who view or watch ads or videos on social media, data show that the vast majority, 91 percent, watch short videos on social media. However, slightly over half, 55 percent, watch long videos, such as tutorials or product reviews.

Video Types Viewed	Total	Undergraduate	Graduate
Short videos (like Facebook Story, Snapchat Snap, Instagram Story, TikTok)	91%	93%	90%
Long videos (like tutorials or product reviews)	55%	55%	56%
Other video types	1%	2%	1%

Watch Social Media Videos with Sound On/Off

The vast majority of prospective students who watch ads or videos on social media, 84 percent, do so with the sound on.





Importance of Social Media Videos for School Selection

About 60 percent of undergraduate online students and 50 percent of graduate online students who viewed social media videos said the videos they viewed on social media had little or no importance on their school selection. For 30 percent, they were somewhat important in selecting a school, while for only 11 to 17 percent, they were very important.

Importance of Social Media Videos for School Selection

	Total	Undergraduate	Graduate
Not at all important	28%	31%	24%
Somewhat unimportant	28%	30%	26%
Somewhat important	30%	28%	32%
Very important	14%	11%	17%





Watched Videos on School Social Media Accounts

Facebook users are most likely to view videos on school or program accounts they were considering, with 31 percent of undergraduate online students and 38 percent of graduate online students doing so. Another 27 percent of undergraduate online students and 30 percent of graduate online students watched videos on a school's Instagram account. Note, however, that one-third of respondents did not view videos on any of the social media accounts of schools they were considering.

Watched Videos on School Social Media Accounts

	Total	Undergraduate	Graduate
Facebook	35%	31%	38%
Instagram	28%	27%	30%
TikTok	17%	18%	17%
Twitter	12%	11%	13%
Snapchat	8%	7%	9%
LinkedIn	4%	3%	6%
Reddit	4%	4%	5%
Pinterest	4%	3%	5%
Discord	2%	2%	3%
Twitch	2%	2%	2%
Patreon	1%	1%	1%
Another social media platform	1%	1%	1%
I did not view videos about schools I was considering	33%	36%	29%



Watch Video Ads on Social Media Platforms

Almost half of all online college students who cited use of specific social media platforms view or watch video ads on Facebook. Another 46 percent do so on Instagram, and 34 percent watch ads on TikTok.

Watch Ads on Social Media Platforms

	Total	Undergraduate	Graduate
Facebook	49%	47%	50%
Instagram	46%	45%	46%
TikTok	34%	36%	33%
Snapchat	24%	25%	24%
Twitter	19%	17%	22%
Pinterest	10%	8%	11%
LinkedIn	8%	6%	10%
Reddit	8%	7%	9%
Twitch	7%	7%	8%
Discord	4%	3%	5%
Patreon	1%	1%	2%
Another social media platform	1%	1%	1%
I did not view or watch ads on social media	15%	16%	14%

Section 5:

Online College Students and Streaming Media





Streaming Media Platform Usage

Almost all online college students consume one or more streaming services. Online college students are most likely to stream media on Netflix, 77 percent, followed by YouTube, 73 percent. More than half of the survey respondents stream Hulu and Disney+, and 45 percent stream Amazon Prime TV and Spotify.

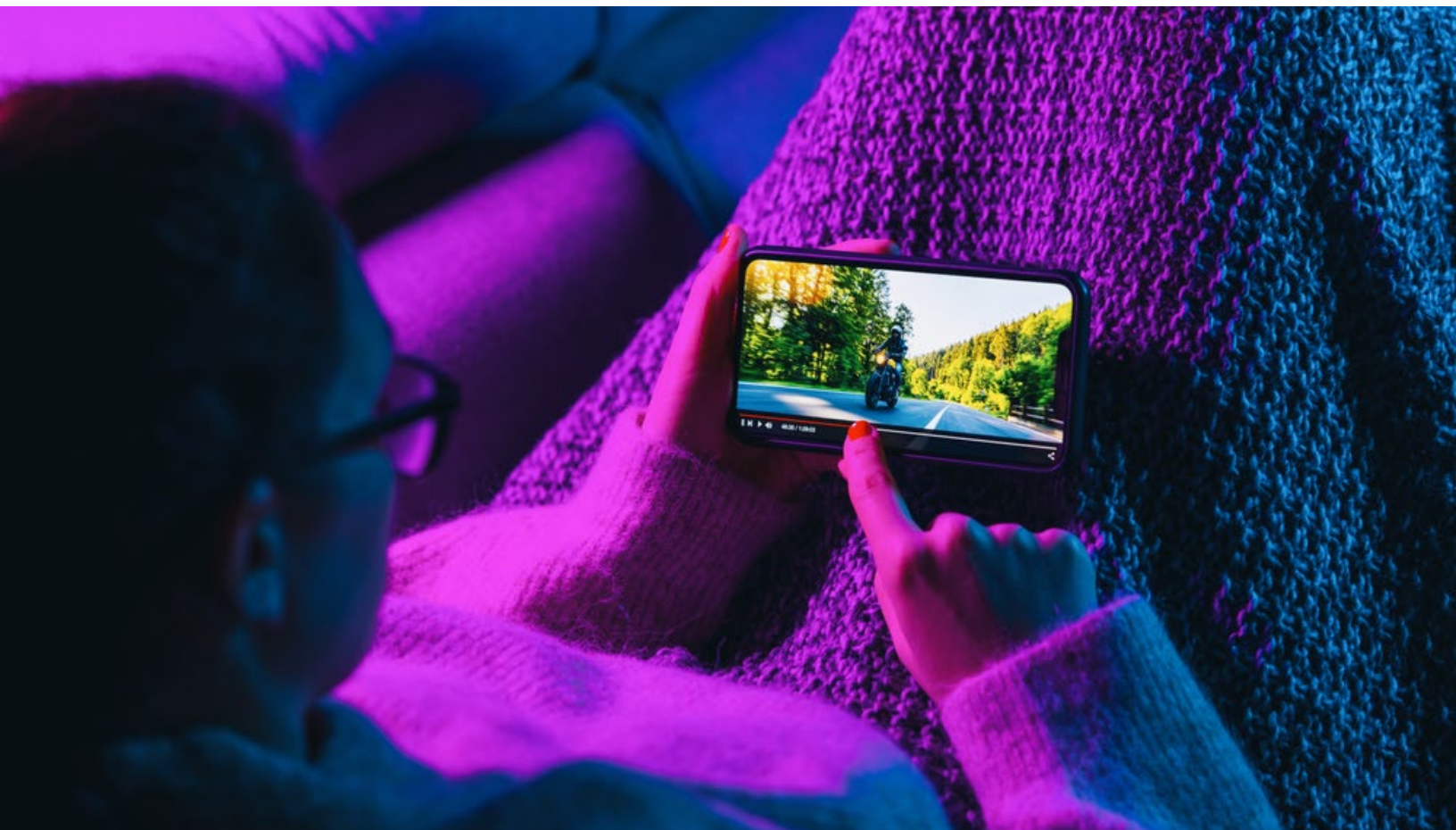
Streaming Media Platform	Total	Undergraduate	Graduate
Netflix	77%	77%	76%
YouTube	73%	74%	72%
Hulu	58%	59%	57%
Disney+	54%	53%	54%
Amazon Prime TV	45%	45%	46%
Spotify	45%	45%	46%
Paramount+	27%	26%	27%
YouTubeTV	23%	20%	25%
Pandora	22%	21%	24%
Amazon Music	21%	19%	23%
Apple TV	19%	17%	21%
ESPN+	16%	14%	19%
iHeartRadio	9%	8%	10%
Sling	5%	4%	6%
Something else	2%	3%	2%
I do not use any streaming media service	2%	1%	2%



Streaming Media Devices

Most respondents that stream media, 87 percent, do so using their smartphone. Sixty percent of respondents reported streaming services on computers and/or televisions.

Streaming Media Devices	Total	Undergraduate	Graduate
Smartphone	87%	87%	86%
Computer	60%	59%	61%
Television	60%	61%	59%
Tablet	32%	32%	33%
Something else	1%	1%	1%





Frequency of Streaming Service Usage: Total

Online college students stream media quite often. A substantial percentage stream on multiple platforms daily. Among specific platforms cited, almost three quarters (73%) of survey respondents stream media daily on YouTube. Almost 70 percent stream media every day on Spotify. Other platforms on which more than half stream daily include Netflix, YouTubeTV, and Hulu.

Frequency of Streaming Service Usage: Total	Daily	Weekly	Monthly	Less Than Once Per Month
YouTube	73%	21%	5%	1%
Spotify	69%	23%	6%	2%
Netflix	59%	34%	6%	1%
YouTubeTV	55%	30%	10%	4%
Hulu	51%	36%	10%	3%
Pandora	48%	34%	12%	6%
Amazon Music	46%	35%	14%	5%
Sling	43%	35%	15%	7%
iHeartRadio	42%	38%	17%	4%
Disney+	40%	41%	16%	3%
Apple TV	38%	36%	19%	7%
ESPN+	36%	45%	12%	6%
Paramount+	35%	45%	17%	4%
Amazon Prime TV	33%	45%	17%	4%



Frequency of Streaming Service Usage: Undergraduate

We see similar patterns when looking only at the undergraduate online student data. A majority of streaming media consumers who cited specific streaming media platform usage, stream media every day on YouTube (72%), followed closely by Spotify, at 70 percent. Almost 60 percent stream media every day on Netflix, while about half stream media every day on YouTubeTV, Hulu, and Pandora.

Frequency of Streaming Service Usage: Undergraduate	Daily	Weekly	Monthly	Less Than Once Per Month
YouTube	72%	23%	5%	1%
Spotify	70%	23%	6%	2%
Netflix	58%	36%	6%	1%
YouTubeTV	52%	33%	10%	5%
Hulu	49%	36%	11%	3%
Pandora	48%	35%	13%	5%
Amazon Music	45%	35%	14%	6%
iHeartRadio	44%	35%	18%	4%
Sling	43%	36%	16%	5%
Disney+	39%	41%	17%	3%
ESPN+	38%	42%	13%	7%
Apple TV	34%	39%	20%	7%
Amazon Prime TV	33%	43%	20%	4%
Paramount+	32%	48%	18%	3%



Frequency of Streaming Service Usage: Graduate

Data among graduate online students are similar to undergrad students. The largest proportion of streaming media consumers who cited specific streaming media platforms, about 75 percent, stream media on YouTube every day, followed by about 70 percent who stream media every day on Spotify. About 60 percent do so every day on Netflix or YouTubeTV, and about half do so on Hulu or Pandora.

Frequency of Streaming Service Usage: Graduate	Daily	Weekly	Monthly	Less Than Once Per Month
YouTube	74%	20%	5%	1%
Spotify	69%	23%	5%	3%
Netflix	61%	32%	6%	2%
YouTubeTV	58%	28%	11%	4%
Hulu	52%	36%	8%	4%
Pandora	48%	33%	12%	7%
Amazon Music	47%	35%	13%	5%
Apple TV	43%	33%	17%	7%
Sling	43%	34%	14%	8%
iHeartRadio	41%	40%	16%	4%
Disney+	40%	41%	16%	3%
Paramount+	37%	43%	16%	4%
ESPN+	35%	48%	12%	6%
Amazon Prime TV	33%	48%	15%	5%
Something else	72%	21%	3%	3%



Time of Day Using Streaming Platform: Total

Looking at the streaming platforms in order of most-to-least used among streaming media consumers, the following data show when exactly online college students stream media on each platform. In general, online college students stream media on the majority of platforms after 5:00 PM. They stream about one third of the platforms from noon to 5:00 PM. Music streaming platforms tend to be used earlier in the day.

Time of Day Using Streaming Platform: Total	Morning (Before 12 noon)	Afternoon (Noon to 5 p.m.)	Evening (After 5 p.m.)
Netflix	11%	28%	62%
YouTube	23%	45%	32%
Hulu	11%	33%	56%
Disney+	14%	29%	56%
Amazon Prime TV	10%	28%	63%
Spotify	35%	41%	24%
Paramount+	13%	29%	58%
YouTubeTV	21%	32%	48%
Pandora	28%	44%	28%
Amazon Music	31%	41%	29%
Apple TV	16%	29%	55%
ESPN+	14%	32%	54%
iHeartRadio	30%	42%	28%
Sling	17%	39%	45%
Something else	17%	28%	56%



Time of Day Using Streaming Platform: Undergraduate

Among undergraduate online student streaming media consumers, a similar usage pattern emerges. Respondents most often stream video content after 5:00 PM and stream music or audio content more often before 5:00 PM.

Time of Day Using Streaming Platform: Undergraduate	Morning (Before 12 noon)	Afternoon (Noon to 5 p.m.)	Evening (After 5 p.m.)
Netflix	10%	27%	64%
YouTube	22%	46%	32%
Hulu	11%	32%	57%
Disney+	14%	28%	58%
Amazon Prime TV	9%	27%	65%
Spotify	35%	41%	24%
Paramount+	12%	29%	59%
YouTubeTV	22%	31%	47%
Pandora	30%	44%	26%
Amazon Music	30%	42%	28%
Apple TV	14%	31%	55%
ESPN+	17%	31%	52%
iHeartRadio	30%	42%	28%
Sling	16%	39%	44%
Something else	19%	23%	58%



Time of Day Using Streaming Platform: Graduate

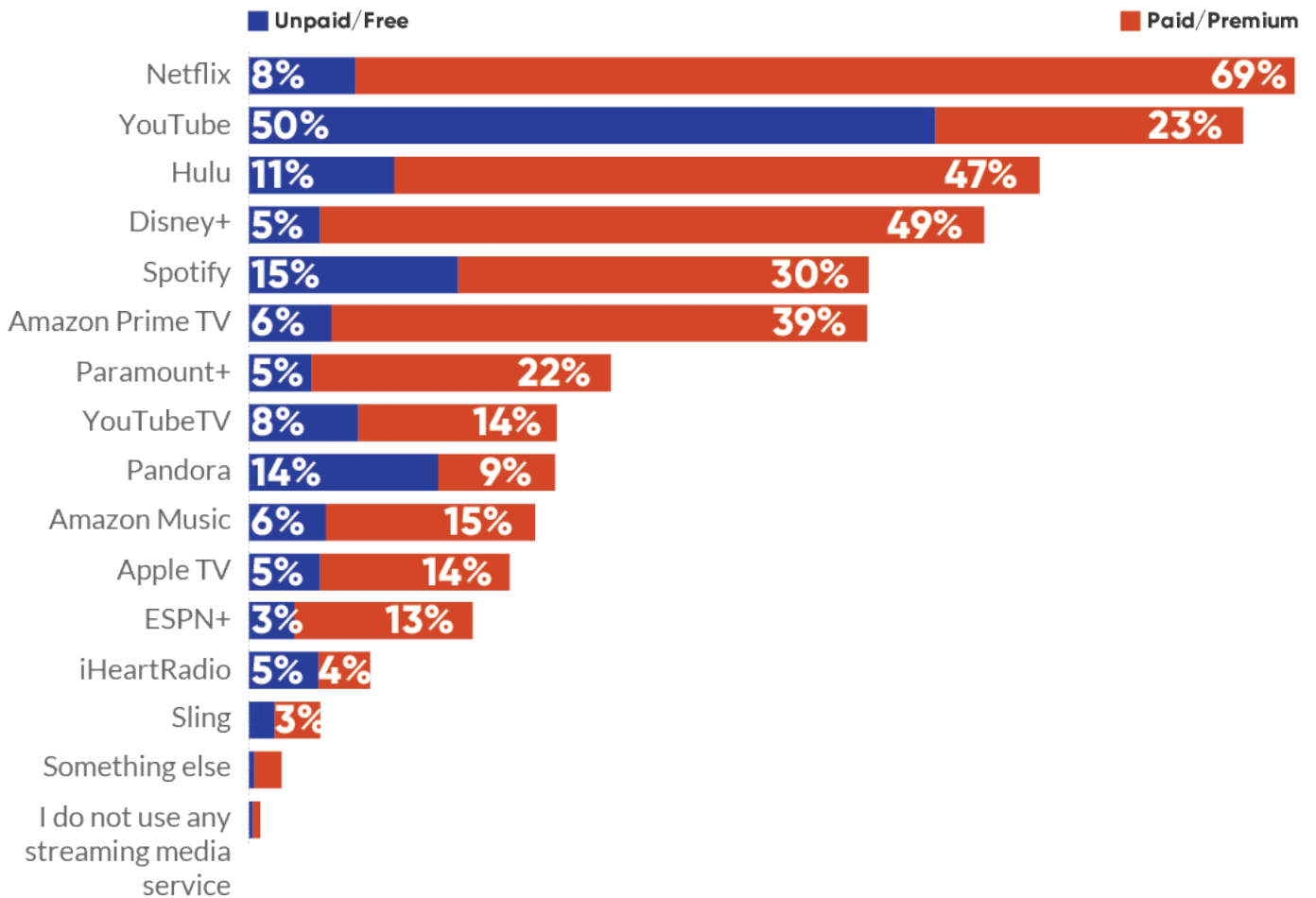
Among graduate online student streaming media consumers, again, a similar usage pattern emerges. Respondents most often stream video content after 5:00 PM and stream music or audio content more often before 5:00 PM.

Time of Day Using Streaming Platform: Graduate	Morning (Before 12 noon)	Afternoon (Noon to 5 p.m.)	Evening (After 5 p.m.)
Netflix	12%	29%	60%
YouTube	24%	43%	33%
Hulu	11%	33%	56%
Disney+	14%	31%	55%
Amazon Prime TV	11%	29%	60%
Spotify	35%	41%	24%
Paramount+	13%	29%	57%
YouTubeTV	19%	32%	48%
Pandora	27%	43%	30%
Amazon Music	31%	40%	29%
Apple TV	18%	27%	55%
ESPN+	12%	33%	55%
iHeartRadio	30%	43%	28%
Sling	17%	38%	45%
Something else	14%	35%	52%



Use of Paid or Unpaid Streaming Services

Both undergraduate and graduate online college student streaming media consumers most often stream media on platforms using a premium, ad-free subscription. Only iHeartRadio, Pandora, and YouTube are more often streamed using a free, ad-supported subscription.





Consumption of Ad-Supported Streaming Services

If given the choice, about half of online college student social media consumers would downgrade from a streaming service with no ads to one with ads in exchange for lower monthly subscription costs.

Would Use Ad-Supported Streaming Service

	Total	Undergraduate	Graduate
Yes	49%	47%	51%
No	31%	31%	31%
Not sure	20%	21%	18%





Desire for Ad-Supported Streaming Services

Among specific cited platforms used, the largest proportions would do so to stream media on YouTube, 37 percent, followed closely by Netflix, 36 percent. About 30 percent would downgrade to an ad-supported subscription to Hulu and about 20 percent would stream ad-supported media on Disney+.

Desire for Ad-Supported Streaming Service

	Total	Undergraduate	Graduate
YouTube	37%	35%	38%
Netflix	36%	35%	37%
Hulu	29%	29%	30%
Disney+	21%	20%	22%
Amazon Prime TV	17%	17%	18%
Spotify	17%	15%	19%
Paramount+	10%	10%	11%
Pandora	9%	8%	11%
YouTubeTV	9%	8%	11%
Apple TV	8%	7%	9%
Amazon Music	8%	7%	9%
ESPN+	6%	5%	7%
iHeartRadio	3%	2%	4%
Sling	2%	1%	2%
Something else	1%	1%	1%
None of these	16%	17%	15%

Section 6:

The Online College Student's Decision-Making Process

Where School Selection Process Began

Research most often begins with a prospective student visiting a school's website or conducting a search on Google. In fact, 70 percent of online college students began their search for online study by visiting the school website and/or searching on Google. Over one third of all prospective students initiated engagement by calling or emailing the school directly.

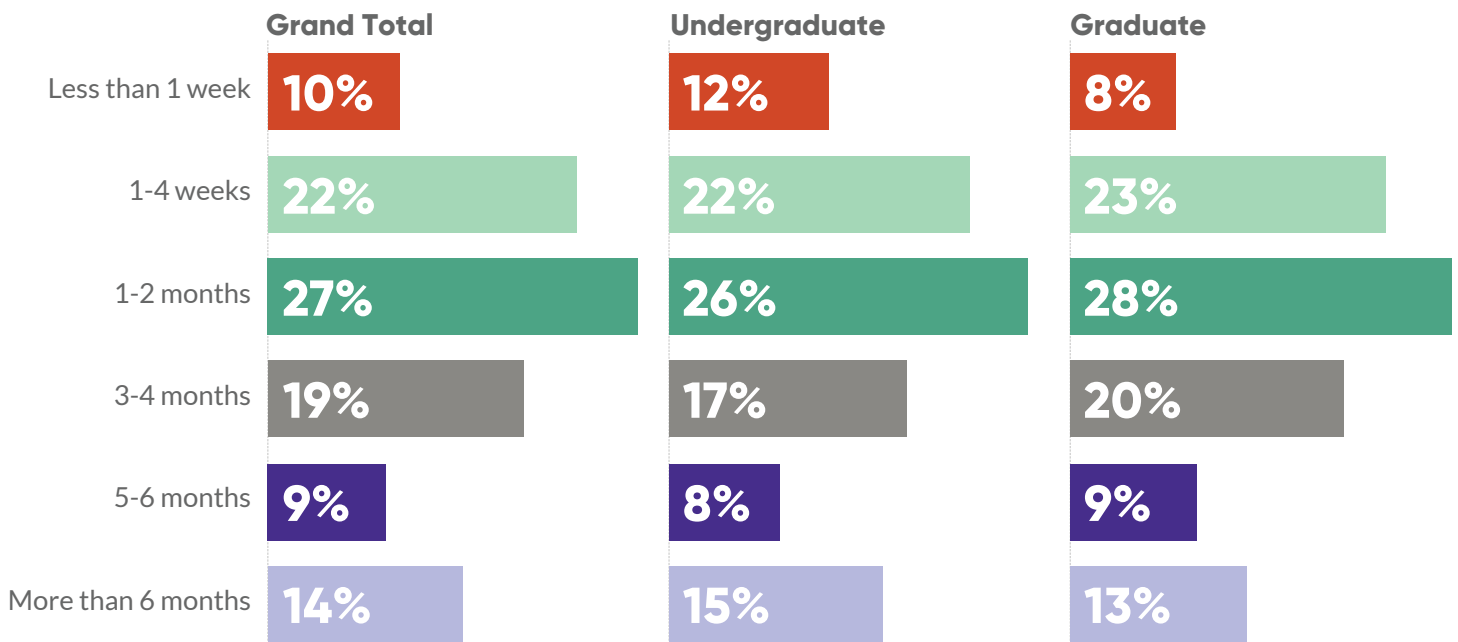
Where School Selection Process Began

	Total	Undergraduate	Graduate
Visit school website	69%	71%	68%
Google searches	68%	69%	67%
Call or email school	36%	32%	40%
Follow on social media	16%	14%	17%
Something else	8%	10%	5%



Length of School Selection Process

The amount of time a student spends conducting research can vary greatly, but the selection process is typically completed within two months. The largest proportion of online students, 27 percent, took between one and two months to select a school. Another 22 percent took between one and four weeks to select a school. Meanwhile, a significant number of students, 42 percent, took three or more months to settle on a school, and 14 percent conducted searches that lasted more than 6 months.





Factors Influencing School Selection

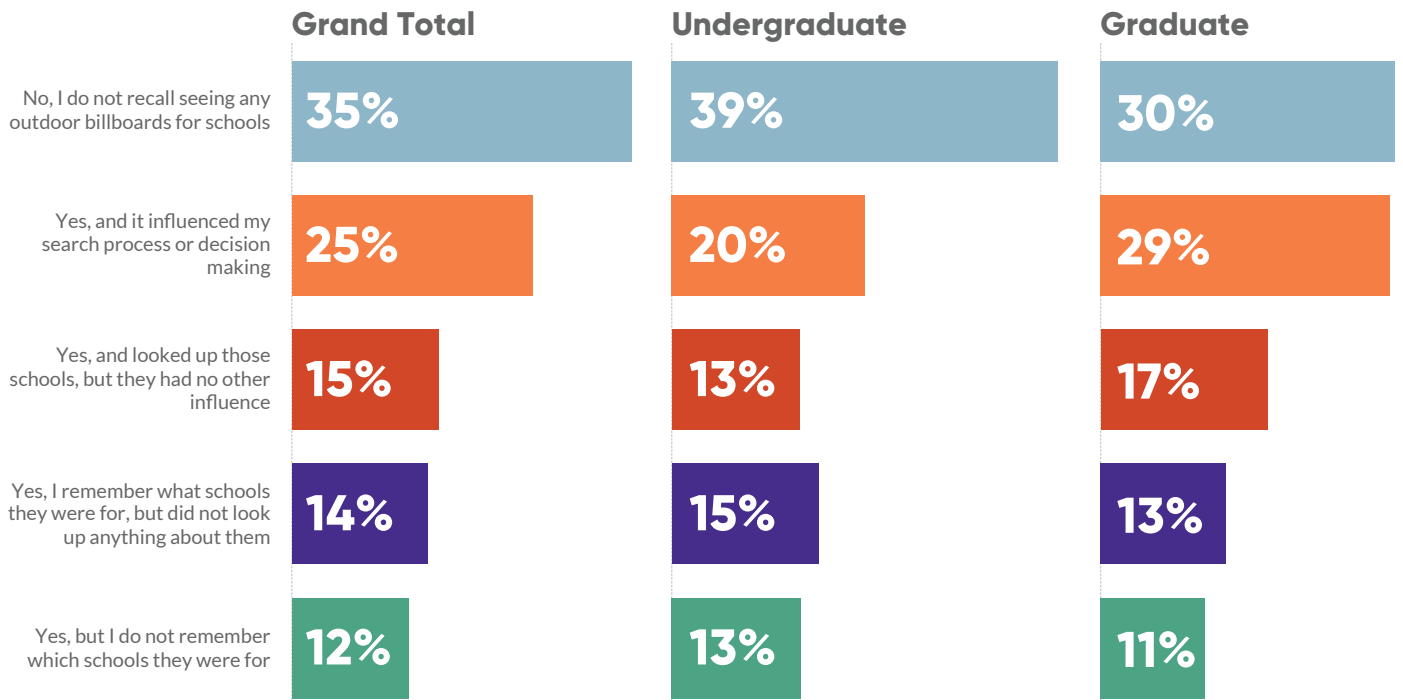
When conducting their search for an online program, online college students were most influenced by in-person events, such as a campus tour or class audits. Another 35 percent were most influenced by online events, such as webinars, online tours, and online social events, while 25 percent were most influenced by search engine results.

School Selection Influence	Total	Undergraduate	Graduate
In-person events (campus tour, class audits, etc.)	38%	35%	40%
Online events (webinars, online tours, online social events, etc.)	35%	32%	37%
Search engines (Google, Bing, Safari, etc.)	25%	25%	25%
Social media (Facebook, Instagram, etc.)	17%	16%	18%
Community members (friends/family/coworkers/academic advisor)	14%	16%	12%
I live near the school	12%	15%	8%
Emails from schools	11%	11%	10%
Media awareness (television, radio, streaming services, magazines, newspapers, billboards, podcasts)	9%	7%	10%
Direct letters and postcards from schools	6%	6%	5%
Online chats with schools	6%	5%	6%
Past association with the school	6%	5%	6%
Something else	3%	3%	3%



Recall of Outdoor Billboard Advertising for Schools

Over half of all respondents (60 percent of undergraduate and 70 percent of graduate online students) recalled seeing one or more outdoor billboards advertising colleges and universities. However, among those who did recall seeing a billboard, only 20 percent of undergraduate online students and 30 percent of graduate online students said it influenced their search or decision-making processes.





Most Important Factors in Enrollment Decisions

Online college students considered many different factors when they enrolled in online study. When we asked them to cite the five most important factors, about half cited the cost of tuition and fees. The availability of online programs (36%) and program offerings that match their career goals (35%) were also cited by over one third of all respondents.

Most Important Factors in Enrollment Decisions	Total	Undergraduate	Graduate
Cost of tuition and fees	49%	52%	46%
Availability of online programs	36%	36%	36%
School offers programs that match my career goals	35%	36%	34%
Availability of flexible formats (online, hybrid, low residence...)	31%	32%	29%
Length of time to complete my studies	29%	28%	30%
Availability of scholarships, fellowships, and assistantships	29%	30%	27%
Reputation/reputation of the college or program	26%	25%	26%
Acceptance of previously earned credits	23%	24%	21%
Location where my courses are offered/available	22%	22%	21%
Feeling that school/program/staff cared about my success	22%	22%	22%
Professional accreditation of my program	21%	19%	23%
Available student support services	20%	21%	19%
No required campus visits	20%	19%	20%
Availability of accelerated courses	19%	18%	20%
Recommendations of friends, family, associates	18%	17%	18%
Multiple start dates to begin my studies	18%	18%	18%
Feeling of inclusiveness on campus/in program for students like me	15%	15%	15%
School has a population of students like me	15%	14%	15%
Attractiveness of specific school marketing messages and advertisements	12%	12%	12%
Received credit for Prior Life Experience or other non-traditional pathways to credit	12%	11%	13%
Located near public transportation	11%	11%	12%
Recommended by my employer	11%	10%	12%
Availability of childcare	10%	9%	12%



Most Attractive School Features of Schools

When it comes to attracting online college students, 38 percent think the best way a school can influence them to select it over another school would be lower tuition. A substantial number of undergraduate and graduate online students also cited higher scholarships and grants, programs that match their career objectives, tuition payment plans, free textbooks, faster program completion times, and free courses—almost all of which are financially related.

Most Attractive Features of Schools	Total	Undergraduate	Graduate
Lower tuition	38%	41%	35%
Higher scholarships and grants	26%	28%	25%
Programs match my career objectives	26%	26%	25%
Tuition payment plan	25%	25%	26%
Free textbooks	24%	26%	22%
Faster time to complete my program	24%	24%	24%
Free course	23%	23%	24%
Free technology equipment (computer, iPad, tablet, etc.)	21%	20%	21%
More course/class options	20%	21%	19%
Feeling like I belonged	20%	20%	20%
Fee waivers (such as application, registration, or deposit)	19%	20%	18%
Accelerated program options to finish faster	18%	20%	17%
Student services	18%	18%	18%
Generous or friendly acceptance of transfer credits	15%	15%	14%
Lifetime career services	14%	12%	17%
Blended/hybrid courses	13%	13%	13%
Improved communication when I inquire or apply	12%	9%	14%
Linkages to area industry and employers in my study field	11%	10%	11%
Apprenticeships	10%	10%	10%
Larger school	8%	7%	9%
Audit a class for free	7%	6%	7%
Alumni discount	5%	4%	7%
Military discount	5%	5%	5%



Distance from Institution Willing to Consider

Only 15 percent of respondents indicated that they had no preference for an institution’s location. A vast majority of the students, both undergraduate (83%) and graduate (85%), indicated that proximity to an institution was a determining factor. Over half of all respondents sought a school that is less than an hour driving distance from their home.

Maximum Distance from Institution Willing to Consider	Total	Undergraduate	Graduate
0-30 minutes away	29%	32%	27%
31-59 minutes away	33%	31%	35%
1-2 hours away	17%	15%	19%
More than 2 hours away	6%	6%	5%
No preference/I would consider a college anywhere	15%	17%	14%

The Impact of Satellite Locations on Enrollment Decisions

About three quarters would be willing to enroll in an online program at a school located farther than two hours away if the institution had a satellite location in closer proximity.

Enroll at Farther Institution if Closer Satellite Location	Total	Undergraduate	Graduate
Yes	76%	74%	77%
No	25%	26%	23%



Initial Inquiry Method

Online college students use a variety of inquiry methods to engage with target schools. Almost one quarter (24 percent) of students begin their inquiry with a website Request for Information (RFI) form, making it the most commonly used inquiry method. Another 22 percent of undergraduate online students and 16 percent of graduate online students didn't inquire at all; they simply submitted an application. Fifteen percent email the institution as their initial method of initial inquiry.

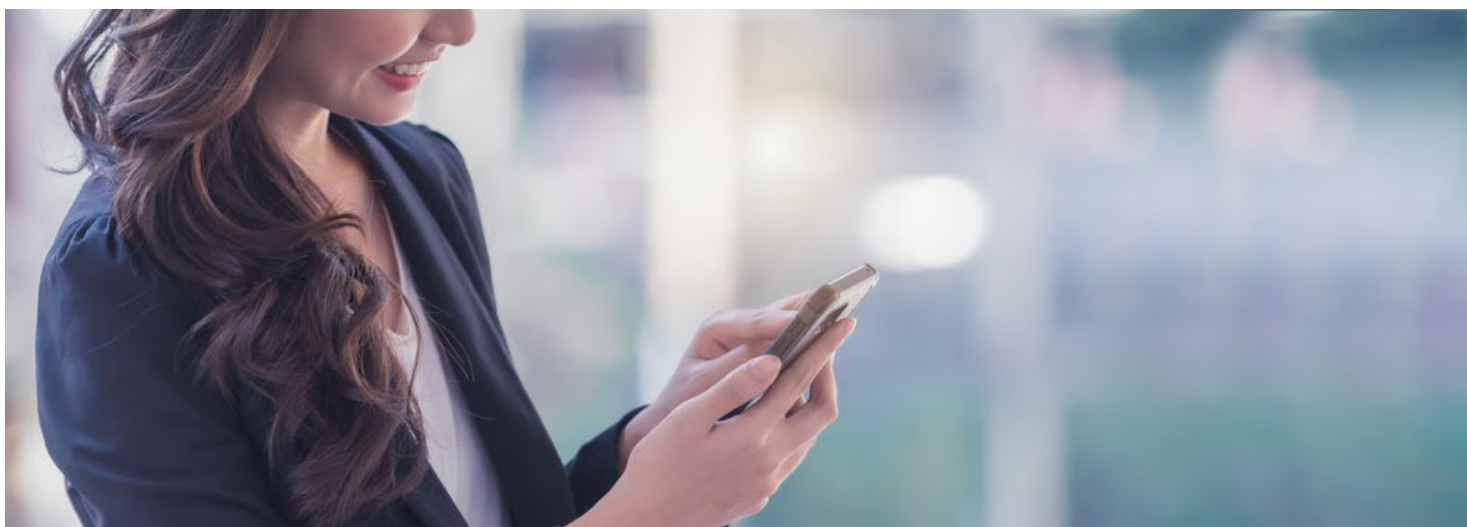
Initial Inquiry Method	Total	Undergraduate	Graduate
Via the college website information request form	24%	25%	23%
I submitted an application	19%	22%	16%
Email	15%	14%	16%
In person	10%	10%	10%
Via a social media platform (such as Facebook or Twitter)	9%	8%	9%
Telephone	8%	7%	9%
At a college fair or similar event	8%	9%	7%
Text messages/SMS	4%	3%	5%
Messaging service such as WhatsApp or Facebook Messenger	3%	2%	5%
Other	1%	1%	0%



Preferred Contact Method

About half of undergraduate online students and 45 percent of graduate online students prefer to be contacted by schools via email. Nearly 15 percent prefer to be contacted by telephone, while 10 percent prefer to communicate via text/SMS.

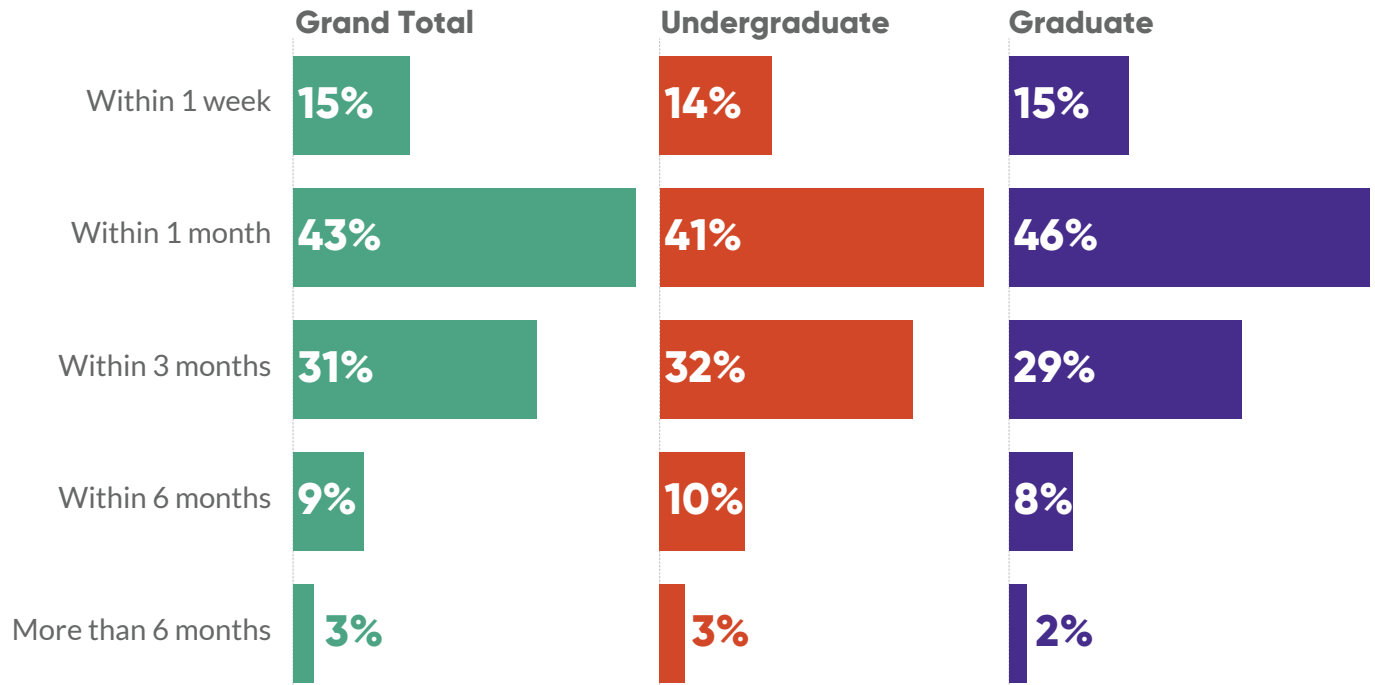
Preferred Contact Method	Total	Undergraduate	Graduate
Email	46%	49%	44%
Telephone	14%	14%	15%
Text messages/SMS	10%	10%	10%
In person	7%	7%	8%
I submitted an application	7%	7%	7%
Via the college website information request form	5%	5%	4%
Via a social media platform (such as Facebook or Twitter)	4%	3%	6%
At a college fair or similar event	3%	3%	3%
Messaging service such as WhatsApp or Facebook Messenger	3%	2%	4%





Expected Time Between Acceptance and Start

Once online college students are accepted into a program, 43 percent expect to start within one month, and 15 percent want to start within one week. An additional 31 percent expect to start within three months.



Section 7:

How do Students Pay for College?





TUITION

Tuition Consideration

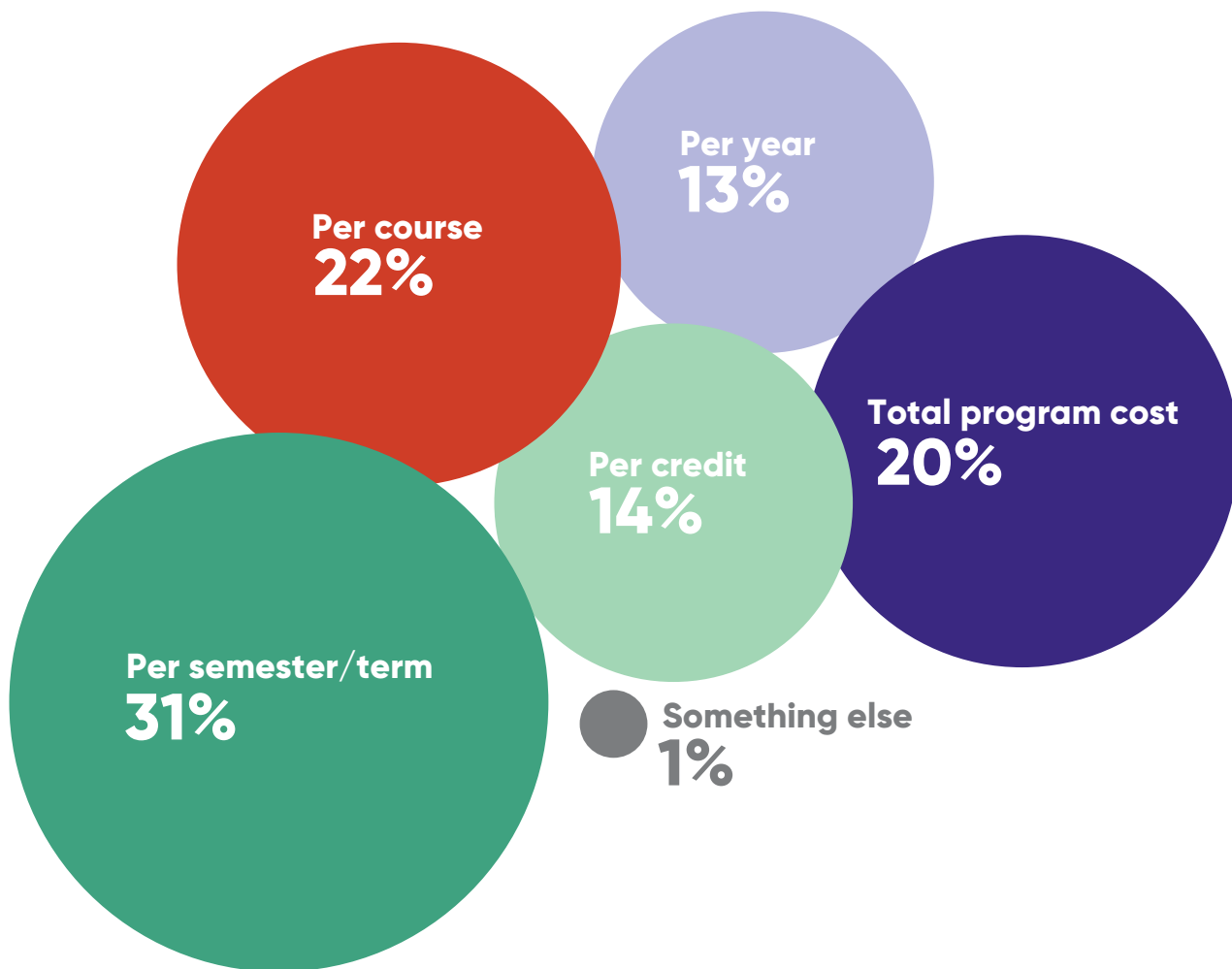
The cost of tuition is an important determining factor for many students. However, it is not the only factor students consider. Only 38 percent of all students enrolled at the school that had the least expensive tuition among all the institutions they considered. However, 32 percent enrolled at a school that had higher tuition than others they considered, because it had the ideal format, schedule or location. An additional 19 percent enrolled in more expensive schools because the program better met their needs, while 8 percent chose a more expensive school based on reputation.

Tuition Consideration	Total	Undergraduate	Graduate
Tuition was/is the least expensive among the programs I evaluated.	38%	40%	36%
Tuition was/is higher than some others, but the available format, schedule, or location are ideal.	32%	31%	33%
Tuition was/is more expensive than some, but the degree programs are ideal.	19%	18%	20%
Tuition was/is more expensive than some, but the school/program has the best reputation.	8%	7%	9%
Tuition was among the most expensive, but this was not a priority in my decision.	3%	3%	2%



Cost Determination Preference

When it comes to how respondents prefer to determine tuition for their online program, data are somewhat split. However, the largest proportion, 31 percent, prefers to receive tuition information by semester/term. Equal proportions of about 20 percent each prefer to receive it either per course or by the total program cost.





Current Student Loan Debt from Undergraduate Study

A majority of students, 66 percent, previously incurred debt from prior undergraduate study. The largest proportion who did incur debt (and have yet to pay it off), 21 percent, owed between \$5,001 and \$15,000. Thirty-three percent carried more than \$15,000 in student loan debt.

Current Student Loan Debt from Undergraduate Study

	Total	Undergraduate	Graduate
I did not incur any debt	32%	35%	28%
\$5,000 or less	16%	16%	15%
\$5,001 to \$15,000	21%	20%	21%
\$15,001 to \$30,000	15%	14%	16%
\$30,001+	8%	6%	9%
I have paid off my previous student loan debt	6%	5%	7%
Prefer not to answer	4%	4%	4%





Impact of Federal Government Student Loan Forgiveness Program

If the \$10,000 US Federal loan forgiveness program is enacted, most students carrying debt expect the program to benefit them. For 31 percent, it means clearing all their debt entirely. For 28 percent, it will clear most but not all their debt. And for 24 percent, it will positively impact some of their debt.

Note that a larger proportion of undergraduate online students, 35 percent, will have all their debt forgiven should the program be enacted, versus 27 percent of graduate online students.

Impact of US Student Loan Forgiveness Program	Total	Undergraduate	Graduate
Will forgive all of my remaining debt	31%	35%	27%
Will positively impact most of my debt, but not all	28%	27%	30%
Will positively impact some of my debt	24%	21%	27%
Not sure	11%	11%	10%
It won't impact me directly	3%	3%	4%
I am not eligible	3%	3%	3%



Preferred Time to Learn About Cost

The majority of online college students, about 60 percent, prefer to learn about the cost of a program when they first visit the website of the school. Another 25 percent prefer to learn about it after they hear back from their initial inquiry at the school.

Preferred Time to Learn About Cost	Total	Undergraduate	Graduate
When I first visit the website of the school	59%	62%	56%
When I hear back from the school after my initial inquiry	25%	23%	27%
When I hear back from the school after I submit my application	11%	10%	12%
After I am accepted	5%	5%	6%

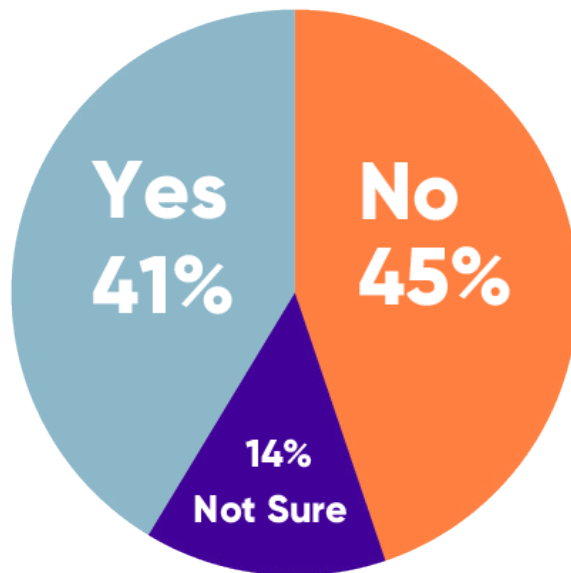




TUITION REIMBURSEMENT

Access To Tuition Reimbursement

A surprisingly high number of students, 14 percent, are unsure if they have access to employer tuition reimbursement programs. While a plurality of undergraduate online students, 48 percent, do not have access to tuition reimbursement through employers, 46 percent of graduate online students have access to employer tuition reimbursement.



Use Of Employer Tuition Reimbursement

Among those who do have access to tuition reimbursement, the majority have used it: 70 percent of undergraduate online students and 81 percent of graduate online students.

Use of Employer Tuition Reimbursement	Total	Undergraduate	Graduate
Yes	77%	70%	81%
No	24%	30%	19%

Reason For Not Using Tuition Reimbursement

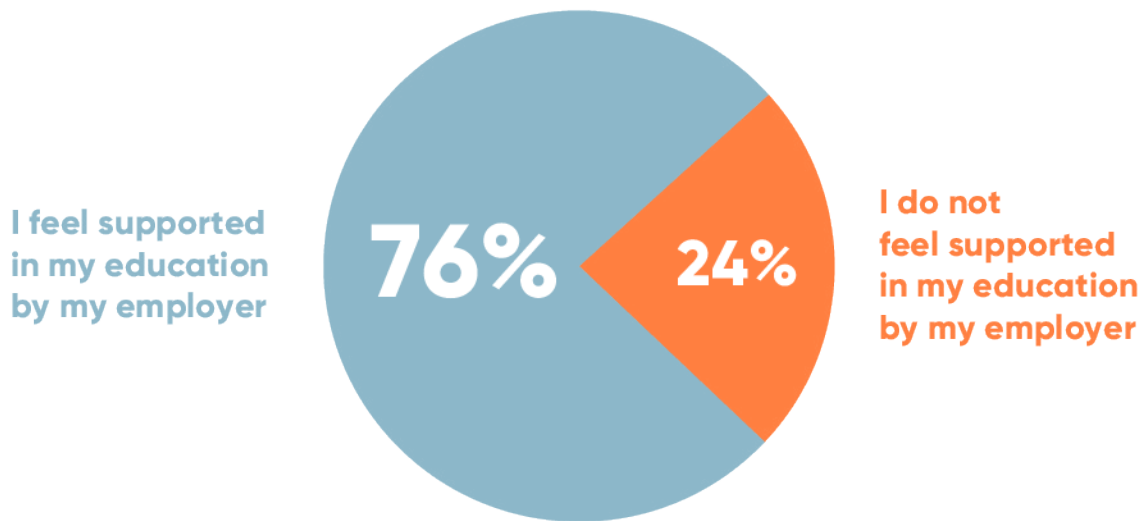
A significant number of students that have access to tuition reimbursement through their employers do not use it. The most common reason stated is that they did not qualify for the program due to their chosen field of study.





Employer Support

The majority of employed online students, 76 percent, feel supported by their employer to pursue their education. While this accounts for the majority of online students, it means that almost 25 percent do not feel support from their employer, a figure that is slightly higher among undergraduates (27%) than graduates (21%).



Tuition Discounts for Organization's Employees

The largest proportion of undergraduate online students, 47 percent, enroll at institutions that do not offer employees at their organization a tuition discount, while the largest proportion of graduate online students, 42 percent, work at organizations that are extended tuition discounts by their institution of enrollment.

Tuition Discounts for Organization's Employees	Total	Undergraduate	Graduate
No	44%	47%	41%
Yes	36%	31%	42%
Unsure	20%	22%	18%



Looking Forward

Given that this is our 12th edition of the Online College Students Report, EducationDynamics offers the following perspectives and trends we view as important for college administrators and staff to recognize as they seek to serve online college students in 2023 and beyond.

Students enrolled full time online undergraduate and graduate programs will continue to be a growth market for colleges in the years to follow. For example, the number of undergraduate students exclusively enrolled in online study was 91 percent higher in 2021 than in 2017³. It is estimated that nearly 5.7 million students are enrolled in fully online programs today⁴.

Individuals of all ages will continue to turn to online programs. No longer can we use the terms “adult” or “post-traditional” in attracting students to college online programs. Age no longer predicts how students will learn. Schools who seek to attract fully online students must appeal to and design their marketing efforts and programs for students of any age. However, in stating such, it must be noted that in this current study, we found that the median age of undergraduate online students was 26 and the median age is 28 for graduate students.

Online college students will continue to enroll in career-focused study. Whether getting started in a new career or advancing in a current career, prospective online students must understand how your institution will help them meet these two primary goals. In advertising and through personal contact, meeting prospective student career preparation goals must be of primary consideration.

Technology and health and medicine topics will continue to grow in online college student enrollment. While business is the major area of interest among prospective students, health, nursing and medicine, and computers/IT/Technology are also the top areas of enrollment interest.

³ NCES, 2021-2017 Fall Enrollment

⁴ NCES, 2021 Fall Enrollment



Online college students will continue to enter the online college enrollment funnel with previously earned college credits. Addressing this “some credit; no credential” market will be critical to institutions that seek to enroll online college students. Most will bring past credits to the table and will be attracted to schools who make it well known that they value and readily accept such past accomplishments.

Websites will continue to serve as the hub of a school’s brand and play a central role in student recruitment and retention. Most prospective students research prospective colleges first and foremost by visiting school websites in which they are interested. It is critical that schools create a student-centric user experience on their website.

Schools seeking to enroll online college students will need to build a strong brand through awareness marketing efforts that reach students before they are in the consideration stage. Social media and streaming media platforms are two valuable and growing avenues for accomplishing this. Online college students are frequent users of social media platforms and streaming media platforms. Among social media platforms, the most influential are Instagram, Facebook, TikTok and Snapchat. Among streaming platforms, Netflix, YouTube and Spotify continue to see significant use.

Schools must continue to carefully consider costs or provide a value proposition that justifies a higher cost. Schools seeking to enroll online college students may consider scholarships and grants – as well as lowering tuition – as ways to entice prospective students. Value is one of the most important determinants on whether a prospect/applicant will move ahead. That being said, if a school can entice a student with a higher value, it can mitigate cost concerns.



Methodology

At the start of the 2022-2023 academic year (fall 2022), EducationDynamics surveyed 3,022 online college students: 1,510 undergraduate students and 1,512 graduate students. All students had to have been enrolled, currently enrolled, or plan to enroll in the next 12 months in a degree (associate, bachelor's, master's, or doctoral) or a for-credit certificate or licensure program. Students who were recently enrolled must have completed their online program. The sample was designed to have a near equal number of undergraduate and graduate online students. Respondents must have been age 18 years or older. Respondents were fielded using a United States nationwide online research panel. Respondents were invited, through a panel, to complete an online survey instrument. Survey respondents were incentivized for their participation. We note that these respondents had no affiliation with EducationDynamics and were invited to participate in the survey from a national panel. Survey fielding was conducted between October and November 2022.



Authors



Carol B. Aslanian is Founder and President of Aslanian Market Research, a Division of EducationDynamics. She is a national authority on the characteristics and learning patterns of adult and online college undergraduate and graduate students. She has made hundreds of presentations to national audiences and has authored numerous articles and reports on the topic. For more than 20 years, she led the College Board’s Office of Adult Learning Services. Ms. Aslanian has led market research projects for more than 300 colleges, universities, and educational agencies. She is an alumna of Cornell University and Harvard University.



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At EducationDynamics, we continuously monitor the higher education marketing and enrollment management landscape. By evaluating external forces, monitoring marketing and student engagement trends, and speaking with current and prospective students, we gain unmatched insights into the student journey. Our full suite of services and solutions touch the entire student lifecycle, from inquiry generation to enrollment management, marketing, branding, contact center services, and more. We give our college and university clients the flexibility to talk to prospective students where they live, moving them smoothly through the engagement funnel from the first point of contact to graduation.

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