

2014-15 Research Report

National Online Learners Priorities Report

An examination of the top priorities and satisfaction levels of college students in online courses

This national report examines responses from more than 122,000 college students enrolled in online courses, recording their satisfaction and priorities in key areas such as:

- Factors that lead to their enrollment in online courses
- The value of tuition
- Institutional reputation
- Instructional quality
- Academic services
- Student services
- Registration

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Assessing online education: The growing need to better serve a growing population

25 percent of students at Title IV institutions took at least one online course.



Most students would re-enroll in their current online program, but one in four said they would not.

In 2012, more than 7,000,000 students were enrolled in at least one online course (Bidwell, 2014). Among Title IV colleges and universities, 25 percent of students were enrolled in at least one online course, with 10 percent exclusively taking online courses and 22 percent of graduate students taking only courses online (U.S. Department of Education, 2014). While the growth of online courses has slowed down, the number of students enrolled in online courses will remain significant.

But how satisfied are they with their educational experience in online courses? How do they feel about the quality and value of their education? Do they receive enough support from their institutions?

This report addresses these questions by examining the satisfaction levels and priorities of students in online courses. The report covers a diverse range of key topics, illuminating how institutions are currently serving online students and areas where institutions could improve the quality of the experience.

About the survey instrument and response group

The 2014-15 *National Online Learners Priorities Report* presents responses from **122,403 students enrolled at 117 institutions** who completed the Noel-Levitz Priorities Survey for Online Learners™ (PSOL) from fall 2011 through spring 2014. Of those students:

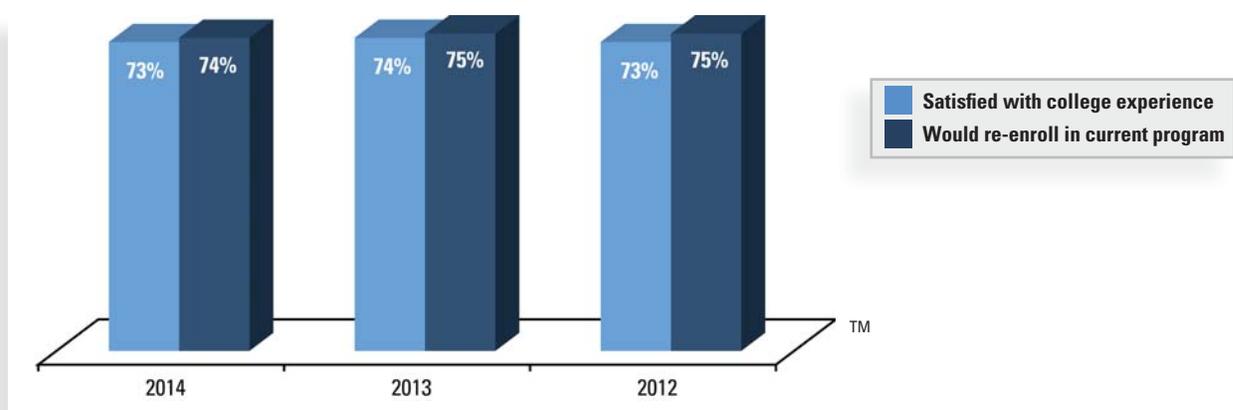
- Nearly 80,000 were undergraduate students (66 percent of respondents).
- More than 36,000 were graduate level students (30 percent of respondents).
- The remaining 4 percent of respondents listed class level as “other.”

The PSOL uses a two-tiered rating system, asking students to rate their satisfaction with an item and how important that item is.

Overall satisfaction of online learners

Before diving into student satisfaction on specific topics, how do online learners feel about their college experience overall? Two survey items addressed this question. First students rated whether they were satisfied with their online learning experience so far. They were also asked, if they had to do it all over again, would they re-enroll in their current online program? Figure 1 shows the current results as well as responses from the previous two years.

Figure 1: Overall satisfaction and re-enrollment likelihood



These numbers provide a bottom-line summary of how online learners rate their institutions. Overall, satisfaction and re-enrollment numbers have held steady over the past three years. However, there are still approximately one-quarter of the students who were not satisfied or would not re-enroll in their current program if they had to do their online learning experience all over again.

Online learners say quality of instruction is a challenge.

Strengths of online learning programs

Individual items on the inventory were analyzed to determine institutional strengths (*high importance and high satisfaction*). Strengths are defined as those items above the midpoint in importance and in the top quartile of satisfaction.

The following strengths were identified by online learners (in order of importance):

- Registration for online courses is convenient.
- Instructional materials are appropriate for program content.
- Billing and payment procedures are convenient for me.
- Adequate online library resources are provided.

Institutions often incorporate their strengths into their marketing activities, recruiting materials, and internal and external public relations opportunities. Strengths also provide positive feedback for campus personnel and online students.

Challenges of online learning programs

Survey items were also analyzed to determine key challenges (*high importance and low satisfaction*). Challenges are defined as being above the midpoint in importance and in the bottom quartile of satisfaction or the top quartile of performance gaps.

Following, listed in order of importance, are the top challenges identified by online learners:

- The quality of online instruction is excellent.
- Student assignments are clearly defined in the syllabus.
- Faculty are responsive to student needs.
- Tuition paid is a worthwhile investment.
- Faculty provide timely feedback about student progress.

Nationally, online learners have high expectations in these areas but feel that their current institutions are not meeting those expectations. Although each institution will have its own list of challenges, these national challenges are also areas that are crucial to student retention.

Enrollment factors and influences on college choice

Why did students choose their online program? Students noted which factors influenced their enrollment.

Table 1: Factors that contributed to enrollment

Factor	All	Undergraduate	Graduate
Convenience	96%	96%	97%
Flexible pacing for completing a program	93%	93%	93%
Work schedule	92%	91%	93%
Program requirements	89%	88%	90%
Financial assistance available	85%	88%	81%
Reputation of institution	85%	85%	84%
Ability to transfer credits	82%	85%	74%
Cost	82%	83%	80%
Future employment opportunities	81%	83%	79%
Distance from campus	62%	64%	58%
Recommendations from employer	58%	60%	51%

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Many issues factor into the decision of a student to enroll in an online course, as at least 80 percent of students listed nearly all of these items as enrollment factors.

Key observations:

- Convenience, flexible pacing, and work schedule are the consistent top three enrollment factors. Online learners clearly require their courses to fit into their lives and to allow them to participate when it is convenient for the student.
- Many issues factor into the decision of a student to enroll in an online course, as at least 80 percent of students listed nearly all of these items as enrollment factors. Institutions need to make sure they address these issues for online learners.
- Financial assistance, ability to transfer credits, distance from campus, and recommendations from employers are more important to undergraduate students than they are to graduate-level students.

Priority issues for online learners

The following tables are listed in order of priority clusters to the overall online learning population. These data reflect the high importance that online learners place on the interactions they have with their respective institutions. While the majority of students are satisfied on most of the items, the ones with larger performance gaps (and high importance) reflect priorities for improvement within online learning programs.

How to read the results on the following tables

Students in this survey answered numerous items about their college experience, providing two ratings:

- **Importance** shows the percentage of students who said the item was important or very important with a rating of a six or seven on the PSOL's seven-point scale for importance.
- **Satisfaction** shows the percentage of students who said they were satisfied or very satisfied with a rating of a six or seven on the PSOL's seven-point scale for satisfaction.
- **Gap** is the difference between the importance score and the satisfaction score.

Strengths and challenges are also highlighted in the tables.

- **Strengths** are items with high importance, high satisfaction, and a low gap. These are items in **green**.
- **Challenges** are items with high importance, low satisfaction, and a high gap. These are items in **red**.

Items that were between a strength and challenge are in black. *Note that strengths and challenges are relative to the data set.* What may be listed as a challenge or strength for one student population may not be a strength or challenge for another, even if the importance, satisfaction, and gap scores are identical.

Table 2: Institutional perceptions

Survey item/student rating	All	Undergraduate	Graduate
Tuition paid is a worthwhile investment.			
Importance	93%	93%	93%
Satisfaction	68%	70%	64%
Gap	25%	23%	29%
This institution has a good reputation.			
Importance	88%	87%	90%
Satisfaction	75%	77%	71%
Gap	13%	10%	19%

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Key observations:

- Although the perception of tuition value is a challenge for online learners, they had considerably higher levels of satisfaction than students at four-year institutions on this item, where satisfaction ranged from 46-52 percent (Noel-Levitz, 2014).
- While a Gallup poll of Americans showed that 37 percent agreed that online institutions offer a high-quality education compared to 77 percent for traditional colleges and universities (Bidwell, 2014), online students generally feel satisfied that their institution has a good reputation.

Online learning programs are excelling in the areas of course registration and billing.

Table 3: Enrollment services

Survey item/student rating	All	Undergraduate	Graduate
Registration for online courses is convenient.			
Importance	93%	93%	93%
Satisfaction	86%	86%	87%
Gap	7%	7%	6%
Billing and payment procedures are convenient for me.			
Importance	91%	91%	91%
Satisfaction	81%	80%	83%
Gap	10%	11%	8%
Adequate financial aid is available.			
Importance	88%	90%	85%
Satisfaction	70%	71%	70%
Gap	18%	19%	15%
I receive timely information on the availability of financial aid.			
Importance	88%	90%	84%
Satisfaction	70%	70%	70%
Gap	18%	20%	14%

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Key observations:

- Online learning programs are excelling in the areas of course registration and billing.
- Undergraduate students have placed a slightly higher priority and have a large enough performance gap to identify adequate financial aid as a challenge area. This is similar to what on-ground programs have reported nationally as well (Noel-Levitz, 2014).
- Receiving timely information on the availability of financial aid is also a priority to undergraduate online learners, but in the average scores (which are used to calculate the strengths and challenges), the importance score did not qualify in the top half of items. However, institutions are encouraged to explore the financial aid processes for online undergraduates.

Table 4: Academic services

Survey item/student rating	All	Undergraduate	Graduate
Program requirements are clear and reasonable.			
Importance	94%	94%	95%
Satisfaction	74%	75%	73%
Gap	20%	19%	22%
There are sufficient offerings within my program of study.			
Importance	92%	92%	92%
Satisfaction	74%	74%	73%
Gap	18%	18%	19%
Adequate online library resources are provided.			
Importance	89%	88%	92%
Satisfaction	78%	77%	81%
Gap	11%	11%	11%
Appropriate technical assistance is readily available.			
Importance	89%	90%	88%
Satisfaction	77%	79%	75%
Gap	12%	11%	13%
My program advisor is accessible by telephone and email.			
Importance	88%	89%	87%
Satisfaction	77%	79%	75%
Gap	11%	10%	12%
My program advisor helps me work toward career goals.			
Importance	83%	86%	77%
Satisfaction	64%	67%	57%
Gap	19%	19%	20%
Tutoring services are readily available for online courses.			
Importance	76%	80%	67%
Satisfaction	65%	68%	56%
Gap	11%	12%	11%

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Key observations:

- The majority of the academic services items have relatively high satisfaction.
- Institutions have room for improvement in communicating program requirements to graduate students.
- Graduate students indicate that online library resources are a strength.
- Undergraduate populations indicate that appropriate technical assistance is a strength.
- While not technically listed as a challenge, the satisfaction scores for program advisors helping with career goals and scores for tutoring services are considerably lower than other items, especially for graduate students.

Table 5: Instructional services

Survey item/student rating	All	Undergraduate	Graduate
The quality of online instruction is excellent.			
Importance	95%	95%	96%
Satisfaction	72%	73%	71%
Gap	23%	22%	25%
Student assignments are clearly defined in the syllabus.			
Importance	95%	94%	95%
Satisfaction	75%	76%	72%
Gap	20%	18%	23%
Faculty are responsive to student needs.			
Importance	95%	94%	95%
Satisfaction	73%	74%	72%
Gap	22%	20%	23%
Instructional materials are appropriate for program content.			
Importance	94%	93%	95%
Satisfaction	76%	77%	74%
Gap	18%	16%	21%
Faculty provide timely feedback about student progress.			
Importance	93%	93%	94%
Satisfaction	70%	71%	68%
Gap	23%	22%	26%
Assessment and evaluation procedures are clear and reasonable.			
Importance	91%	90%	92%
Satisfaction	76%	77%	74%
Gap	15%	13%	18%
The frequency of student and instructor interactions is adequate.			
Importance	87%	87%	87%
Satisfaction	71%	72%	69%
Gap	16%	15%	18%
Student-to-student collaborations are valuable to me.			
Importance	54%	55%	53%
Satisfaction	60%	61%	58%
Gap	-6%	-6%	-5%

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Key observations:

- Across the board, instructional services have the greatest number of challenges. Instructional materials are the one area of relative strength in this category.

- Students may be comparing their perceptions of a previous on-ground, in-classroom experience with their online experience, which could influence their perception of these items. For an institution surveying online learners, it would be advisable to examine these issues further to determine the role of perception as opposed to an actual problem.
- Institutions have the opportunity to work to change perceptions regarding the instructional experience, as well as continue to train online faculty to provide the best possible experience.
- A perception of 24/7 availability may be influencing student responses regarding faculty responsiveness and timely feedback. Institutions can encourage faculty to establish realistic response times to students at the beginning of an online course, while also emphasizing to the faculty how critical timeliness is to online learners.

Table 6: Student services

Survey item/student rating	All	Undergraduate	Graduate
This institution responds quickly when I request information.			
Importance	92%	93%	92%
Satisfaction	75%	75%	74%
Gap	17%	18%	18%
I am aware of whom to contact for questions about programs and services.			
Importance	90%	91%	89%
Satisfaction	75%	77%	72%
Gap	15%	14%	17%
The bookstore provides timely service to students.			
Importance	85%	87%	81%
Satisfaction	77%	78%	76%
Gap	8%	9%	5%
Channels are available for providing timely responses to student complaints.			
Importance	83%	84%	82%
Satisfaction	63%	65%	58%
Gap	20%	19%	24%
Online career services are available.			
Importance	78%	81%	71%
Satisfaction	65%	69%	58%
Gap	13%	12%	13%

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Key observations:

- As reflected in this cluster of items, timely response on requests for information and knowing who to contact with technical questions are of top importance, and institutions are doing relatively well on these items.
- It is interesting that career services are of lowest importance in this cluster, as compared with students in on-ground programs. It may be because online students and especially graduate students are more likely to have a career in mind or already have a full-time career when they are enrolled in online classes.

Five additional conclusions and suggestions for improving online student satisfaction

Satisfaction assessments provide foundational data to pinpoint areas of concern for student persistence.

1) Satisfaction assessment uncovers priorities of online learners and helps create an environment where improvement matters.

As Table 2 illustrates, online learning institutions, similar to on-ground campuses, face a crisis of confidence in the “worth” of a college education. A large number of online learners do not see their tuition as a worthwhile investment. Assessing their satisfaction and using it to guide improvements can not only strengthen the student experience, but also show the concern the institution has for students.

2) Measurement is necessary for action.

Michael Porter of Harvard Business School famously said, “What gets measured gets done.” In addition, Noel-Levitz has told campuses that what gets done should also get measured, so that progress can be tracked. That’s why many institutions measure student satisfaction on a regular basis in order to identify priorities and track progress toward meeting benchmarks for student satisfaction.

3) Student satisfaction assessment can set the retention agenda and provide crucial data for accreditation and strategic planning.

The nature of online learning tends to leave students less engaged than on-ground education, making them more vulnerable to attrition. Satisfaction assessments provide foundational data to pinpoint areas of concern for student persistence in order to devise targeted retention strategies. Accreditation agencies also expect student satisfaction data as a metric for demonstrating institutional improvement; this may be especially true for online learning programs.

4) Communication with students can combat perception issues.

Media coverage and common misperceptions can undermine student satisfaction with the college experience and the online learning experience specifically—especially regarding the value of an online college education compared to a traditional college education. Students may also have these perception issues if they are taking both on-ground and online courses. It is crucial for institutions to take charge of communicating with students about institutional strengths and their commitment to improvement. This is often one of the biggest opportunities online programs have to increase the perception of their value and overall experience. It may be even more critical since online learners are not physically on campus and communication can play a big role in the students’ understanding of what the institution is providing.

5) Satisfaction assessment can provide great strengths for recruiting online learners.

Unlike on-ground education, online programs can draw from a much larger pool of potential students, increasing competition among programs. Satisfaction assessment can provide valuable data for prospective students and differentiate the strengths of an institution. Assessment also conveys a sense of concern for the student, showing the institution cares enough about quality to routinely assess its students.

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Participating institutions

AIU-Online, IL
Allen Community College, KS
American College of Education, FL
Amridge University, AL
Anthem College-Online, AZ
Argosy University Online, PA
Art Institute Online, PA
Ashford University, IA
Baker College Online, MI
Bellevue University, NE
Bemidji State University, MN
Bismarck State College, ND
Bon Secours Memorial College of Nursing, VA
Brookhaven College (DCCCD), TX
Bryant & Stratton College-Southtowns, NY
California State University-San Bernardino, CA
Capella University, MN
Carlow University, PA
Central Lakes College, MN
Central Washington University, WA
Champlain College, VT
Cloud County Community College, KS
College of the Ouachitas, AR
Colorado State University-Global Campus, CO
Colorado Technical University-Colorado Springs, CO
Columbia College, MO
Corban University, OR
Cowley County Community College, KS
Crown College, MN
CUNY School of Professional Studies, NY
Cuyahoga Community College, OH
Dakota College at Bottineau, ND
Dakota State University, SD
Dallas Colleges Online, TX
Daymar College-Online, KY
Daytona State College, FL
Dickinson State University, ND
Education Futures Group, LLC, TX
Everglades University, FL
Excelsior College, NY
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Friends University, KS
Front Range Community College, CO
Georgia Military College, GA
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Great Falls College Montana State University, MT
Gwinnett Technical College, GA
Henley-Putnam University, CA
Hope International University, CA
Indiana Wesleyan University, IN
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Mayville State University, ND
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Mississippi State University, MS
Missouri Baptist University, MO
Moberly Area Community College, MO
Nebraska Methodist College, NE
New England College of Business and Finance, MA
New Mexico State University at Alamogordo, NM
North Dakota State College of Science, ND
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University of Wisconsin-Superior, WI
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Valley City State University, ND
Virginia College Online, AL
Virginia Commonwealth University, VA
Volunteer State Community College, TN
Walden University, GA
Wayne Community College, NC
Western Wyoming Community College, WY
Westwood College Online, CO
Williston State College, ND
Wilmington University, DE
Yavapai College, AZ

Questions about this report?

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- Student retention
- Staff and advisor development
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- Financial aid services
- Research and communications
- Institutional effectiveness

Noel-Levitz has developed an array of proven tools and software programs; diagnostic tools and instruments; and customized consultations, workshops, and national conferences. With the Satisfaction-Priorities Surveys (including the Priorities Survey for Online Learners), the firm brings together its many years of research and campus-based experience to enable you to get to the heart of your campus agenda.

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