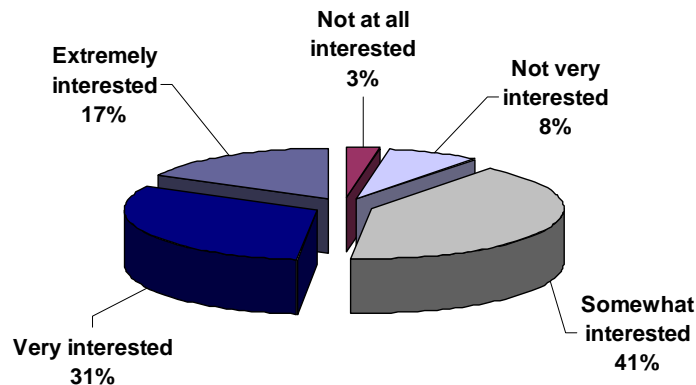


Future Online Learner Survey 2007 EXECUTIVE SUMMARY

The Future Online Learner report explores the results of a recent survey conducted for the purposes of identifying future trends in adult online higher education and informing program development and marketing decisions. A national sample of adults who are not currently enrolled but are interested in continuing their education participated in the survey.

Initial indications predict continued growth in online enrollments. Half (47%) of those surveyed indicated they are 'very' or 'extremely' interested in a degree or certificate program offered partially or completely online. Eighty-nine percent are at least 'somewhat' interested in online education. Furthermore, those most interested in online education expect to enroll sooner than their less enthusiastic counterparts. Half (52%) of those 'extremely' or 'very' interested in online programs expect to enroll in classes within the next 12 months.

Figure 1. Interest in Degree or Certificate Program Offered Completely or Partially Online



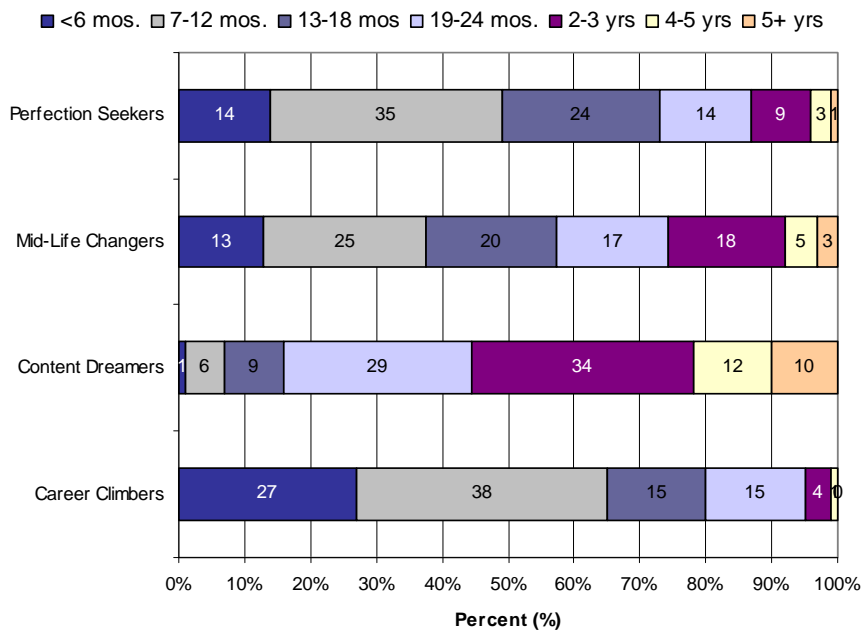
Source: Diagnostics Plus, Future Online Learner Survey (N=1002)

In the prime of their lives, future online learners are better educated and compensated than the average US resident. Sixty-nine percent have earned at least a bachelor's degree. Half (49%) are between the ages of 35 and 39. Most future online learners are white, married, and have a minimum household income of \$50,000. They are most interested in certificate and master's degree programs, in which they expect to enroll part-time. Business is the preferred field of study.

Four types of future online learners were identified.

- **Career Climbers** are the most motivated segment. Young, junior-level professionals driven by career aspirations and future earning potential. They will be the first to enroll; 27% within six months and another 38% within the year. They are a prime market for online higher education providers.
- **Perfection Seekers** are accomplished, older professionals who are most interested in meeting their own expectations and doing the best job they possibly can. *Perfection Seekers* are ready to move promptly (39% within 12 months) and do not face financial barriers to continuing their education.
- **Mid-Life Changers** are the smallest group (17%). This type of learner is looking for something new and different. Older, with less education, less income, and less experience with technology; the *Mid-Life Changer* will require the most institutional support.
- **Content Dreamers** will one day be a likely online learner, but need not be targeted in the short-term. The *Content Dreamer* is young, well educated, and well compensated. They are interested in pursuing additional continuing education credentials but they have a comfortable lifestyle and many family and work obligations. Most will consider enrolling in two or more years.

Figure 2. Anticipated Enrollment Date by Segment



Source: Diagnostics Plus, Future Online Learner Survey (N=896)

University of Phoenix is the unchallenged top-of-mind online education provider. When listed as a potential provider, traditional universities with long histories and large enrollment figures—such as Penn State—and local community colleges are most likely to be evaluated in depth. Rank order of institutions, as well as institutional types, varies depending on whether the student is interested in a certificate, undergraduate degree, or graduate degree.

Specific institutional attributes that will be considered in the selection process fall into four categories. Prestige attributes, including accreditation status, are extremely important to all learner types. Service and support attributes include personalized support services and full-service financial aid. These are also highly rated, but are most important to *Mid-Life Changers*. The institutional type, such as non-profit status, is also most important to *Mid-Life Changers*, but to a lesser extent.

All three program feature categories were rated highly and are areas in which institutions have an opportunity to differentiate themselves from the competition. Student centric features such as 100% online programs and rolling enrollment are most prized by *Mid-Life Changers* but rated highly by all. Career friendly features, such as scheduling that will not disrupt the student's career and the ability to earn credits for work experience, were very popular among all future online learners. Results also indicate that the future online learner requires a quality experience that they perceive to be of equal or higher rigor than classroom courses.

Marketing implications vary by learner type. Some types will be a better fit with certain institutions. All of the information presented in this report should be taken into consideration with the unique resources and achievements of the specific institution to develop a strategic online education plan best suited to the education provider.



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