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NOEL LEVITZ

2015-16 Research Report

National Online Learners Satisfaction and Priorities Report

An examination of the top priorities and satisfaction levels of online learners, with separate data for four-year and two-year institutions

This national report examines responses from more than 118,322 online students enrolled in undergraduate and graduate courses, recording their satisfaction and priorities in key areas such as:

- Factors that lead to online students enrolling in their courses
- Institutional perceptions
- Enrollment services
- Instruction
- Student services

For additional satisfaction-priorities reports for traditional and nontraditional students, visit **www.RuffaloNL.com/Benchmark**

Online learning has become a staple of higher education, with millions of students enrolling every year in at least one online course. It attracts a wide range of students at the undergraduate and graduate level, across all institution types and with a variety of educational goals. Many campuses have stepped up their online offerings to meet this demand.

While millions of online learners enroll in these courses each year, how satisfied are they with their educational experience in their online courses? Do they feel the education they receive is valuable? Do they receive enough support from their institutions?

The *2015-16 National Online Learners Satisfaction and Priorities Report* examines key findings for students enrolled in online courses, including:

- Trends in online student satisfaction and whether those students would re-enroll in their current programs.
- Which factors contributed to the online learner's decision to enroll.
- Aspects of the student experience that matter to online learners, grouped into scales (or clusters of items).
- A closer look at the items within those clusters, with identification of strengths and challenges from the student perspective.

These results come from the Priorities Survey for Online Learners™ (PSOL), an assessment instrument taken by students enrolled in online courses. The report compiles results from 118,322 students from 132 institutions between fall 2012 and spring 2015. The four-year institution segment reflects 107,293 students from 93 institutions, while the community college segment includes 11,029 students from 39 institutions during the same time frame.

A few notes about reviewing this report

On the PSOL, students respond to statements of expectation with an importance rating and a satisfaction rating. These ratings are on a scale of 1 to 7, with 7 being high. The student responses are averaged to produce an importance score and a satisfaction score for each item.

A performance gap is calculated by subtracting the satisfaction score from the importance score.

- Larger performance gaps indicate areas where the institution is not meeting student expectations.
- Smaller performance gaps indicate areas where the institution is doing a relatively good job of meeting the expectations of online learners.
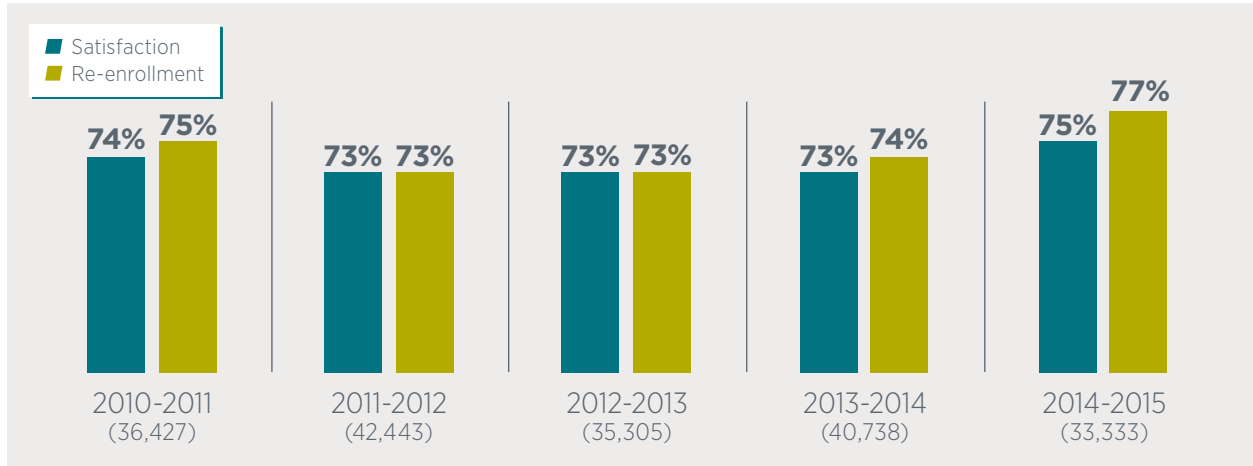
This two-tiered assessment also highlights strengths and challenges.	
STRENGTHS	**CHALLENGES**
High importance	High importance
High satisfaction	Low satisfaction or high performance gap
Items to celebrate as benefits for enrolling at the institution	Priority areas where the institution should direct its focus for improvements

When looking at national results from online learners, strengths are highlighted in **green** text while challenges are reflected by **red** text.
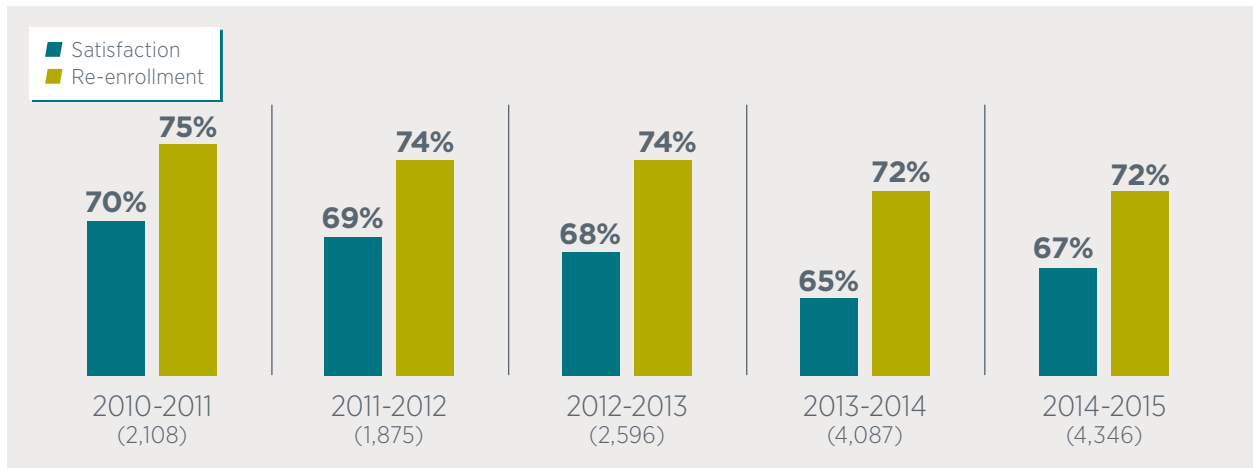
The percentages reflect the students who indicated that the item was important or very important to them (answer 6 or 7 on the 7-point range) and the percentage that said they were satisfied or very satisfied with the item (again, answers 6 or 7).

Trend review of satisfaction and re-enrollment scores

Figure 1: Four-year institution satisfaction and re-enrollment (number of students surveyed is in parentheses)

	Satisfaction	Re-enrollment
2010-2011 (36,427)	74%	75%
2011-2012 (42,443)	73%	73%
2012-2013 (35,305)	73%	73%
2013-2014 (40,738)	73%	74%
2014-2015 (33,333)	75%	77%

Figure 2: Community college satisfaction and re-enrollment (number of students surveyed is in parentheses)

	Satisfaction	Re-enrollment
2010-2011 (2,108)	70%	75%
2011-2012 (1,875)	69%	74%
2012-2013 (2,596)	68%	74%
2013-2014 (4,087)	65%	72%
2014-2015 (4,346)	67%	72%

Comparing the trends at four-year institutions and community colleges, it can be noted that the satisfaction and re-enrollment percentages at four-year institutions have held relatively steady, with an increase in the past academic year. At community colleges, the satisfaction levels took a dip last year with a rebound this year, while re-enrollment percentages have held steady.

A general observation is that online learners at four-year institutions reflect higher satisfaction with their experience than students at community colleges. There are two contributing factors in these higher satisfaction scores. The first factor is the higher percentage of students at four-year institutions indicating that they are enrolled primarily online; these students tend to have higher satisfaction levels than students enrolled primarily on a campus. The second factor is the higher percentage of graduate students enrolled at four-year institutions. This is also a demographic group that typically has higher satisfaction scores. However, it is interesting to note that the re-enrollment levels are comparable for students at both four-year institutions and community colleges.

Factors in the decision to enroll

Why do online learners decide to enroll at an institution? Here are the factors in the decision to enroll, in descending order of importance for students at each type of institution:

Table 1: Enrollment factors at four-year institutions

ITEM	IMPORTANCE %
Convenience	96%
Flexible pacing for completing a program	93%
Work schedule	92%
Program requirements	89%
Reputation of institution	86%
Financial assistance available	85%
Cost	83%
Ability to transfer credits	82%
Future employment opportunities	81%
Distance from campus	60%
Recommendations from employer	58%

Table 2: Enrollment factors at community colleges

ITEM	IMPORTANCE %
Convenience	93%
Flexible pacing for completing a program	88%
Cost	88%
Work schedule	87%
Ability to transfer credits	85%
Program requirements	84%
Financial assistance available	82%
Future employment opportunities	79%
Distance from campus	76%
Reputation of institution	75%
Recommendations from employer	57%

Convenience is the driving factor in the decision to enroll for online learners at both four-year institutions and community colleges. A key difference in the factors at four-year institutions as compared to community colleges is the level of importance of the reputation of the institution at 86 percent vs. 75 percent.

Satisfaction and importance for key areas of the online learner experience

The following tables reflect the individual items on the survey, clustered by topic for four-year institutions and community colleges. Items in green are strengths and items in red are challenges.

Table 3: Institutional perceptions

Item	FOUR-YEAR INSTITUTIONS			COMMUNITY COLLEGES		
	Importance	Satisfaction	Gap	Importance	Satisfaction	Gap
Tuition paid is a worthwhile investment.	93%	69%	24%	91%	72%	19%
This institution has a good reputation.	88%	76%	12%	79%	73%	6%

As reflected in this chart, the item "Tuition paid is a worthwhile investment" is perceived as a challenge for online learners at four-year institutions and a strength for online students at community colleges. This perception is also true for students enrolled on physical campuses, where community college students are more positive about the value of tuition, but many students at four-year institutions are not as satisfied.

This finding shows that online programs for four-year institutions and community colleges need to convey the value of their tuition. For four-year institutions, showing the worthiness of a degree (through job placement, graduate school, alumni testimonials, or other outcomes) may help change the perception of the value of tuition. For community college, affordability can be a key point for engagement and recruitment.

Table 4: Enrollment services

Item	FOUR-YEAR INSTITUTIONS			COMMUNITY COLLEGES		
	Importance	Satisfaction	Gap	Importance	Satisfaction	Gap
Registration for online courses is convenient.	93%	87%	6%	91%	82%	9%
Billing and payment procedures are convenient for me.	91%	82%	9%	89%	77%	12%
Adequate financial aid is available.	88%	71%	17%	87%	70%	17%
I receive timely information on the availability of financial aid.	87%	72%	15%	85%	63%	22%

The perceptions of enrollment services for online learners are similar at four-year and two-year institutions. Convenient registration and billing procedures are identified as strengths at both types of institutions. The one item of note here is the lower satisfaction levels for the timely information on financial aid at community colleges. While not a challenge, it may be an area for additional improvement.

Green=strength, red=challenge

Table 5: Academic services

Item	FOUR-YEAR INSTITUTIONS			COMMUNITY COLLEGES		
	Importance	Satisfaction	Gap	Importance	Satisfaction	Gap
Program requirements are clear and reasonable.	94%	75%	19%	91%	71%	20%
There are sufficient offerings within my program of study.	92%	75%	17%	90%	66%	24%
Adequate online library resources are provided.	90%	79%	11%	81%	70%	11%
My program advisor is accessible by telephone and email.	88%	79%	9%	83%	69%	14%
My program advisor helps me work toward career goals.	83%	65%	18%	81%	60%	21%
Tutoring services are readily available for online courses.	76%	66%	10%	76%	56%	20%
Appropriate technical assistance is readily available.	89%	78%	11%	85%	71%	14%

The perceived strengths and challenges in the area of academic services are different between online learners enrolled at four-year and two-year institutions. Online library services are identified as a strength at four-year institutions, but not at community colleges. A unique challenge at four-year schools is program requirements, while a unique challenge at community colleges is the sufficient program offerings. It may be that online learners at community colleges are enrolled online because they are not able to get access to those same classes on campus.

Green=strength, red=challenge

Table 6: Instructional services

Item	FOUR-YEAR INSTITUTIONS			COMMUNITY COLLEGES		
	Importance	Satisfaction	Gap	Importance	Satisfaction	Gap
Student assignments are clearly defined in the syllabus.	95%	75%	20%	93%	75%	18%
The quality of online instruction is excellent.	95%	73%	22%	92%	66%	26%
Faculty are responsive to student needs.	95%	75%	20%	92%	70%	22%
Instructional materials are appropriate for program content.	94%	76%	18%	91%	73%	18%
Faculty provide timely feedback about student progress.	93%	71%	22%	90%	67%	23%
Assessment and evaluation procedures are clear and reasonable.	91%	77%	14%	87%	72%	15%
The frequency of student and instructor interactions is adequate.	86%	72%	14%	83%	69%	14%
Student-to-student collaborations are valuable to me.	53%	59%	-6%	44%	52%	-8%

Three items are consistently noted as challenges for online learners at both four-year and two-year institutions: quality of instruction, faculty are responsive to student needs, and faculty provide timely feedback. These items have been cited as national challenges for the last several years.

Four-year institutions do not have any strengths identified within the instructional services category, while students at community colleges have three items of strength: student assignments clearly defined, appropriate instructional materials, and evaluation procedures. This is an important distinction—identified for the first time by examining the results separately for four-year and two-year segments. Keep in mind, this area is of particular importance because 86 percent of students in four-year programs cited the reputation of the program as an enrollment factor. If the quality of online instruction, assignments, and faculty availability are issues, those could undermine the perception of the program and impede student completion.

Green=strength, **red**=challenge

Table 7: Student services

	FOUR-YEAR INSTITUTIONS			COMMUNITY COLLEGES		
Item	Importance	Satisfaction	Gap	Importance	Satisfaction	Gap
This institution responds quickly when I request information.	93%	77%	16%	89%	67%	22%
I am aware of whom to contact for questions about programs and services.	90%	76%	14%	85%	64%	21%
The bookstore provides timely service to students.	85%	78%	7%	85%	71%	14%
Channels are available for providing timely responses to student complaints.	83%	64%	19%	77%	57%	20%
Online career services are available.	77%	67%	10%	75%	61%	14%

This cluster reflects two items of challenge for online learners at community colleges: the institution responding quickly to information requests and being aware of whom to contact with questions. These are not perceived as challenges for students in four-year online programs. Community colleges have opportunities for improving communication with their online learning students.

Green=strength, red=challenge

Conclusion: Questions that satisfaction assessment can help you answer with your students

Satisfaction assessment provides valuable data about the student experience as well as priorities for planning. The results in this report provide valuable benchmarks, but what else can you uncover through satisfaction assessment? Here are several questions you can answer with your own survey administration.

Do your online learners feel their tuition is a good value?

As Table 3 shows, nearly all online learners place importance on the tuition they pay being a good value. This tuition value is vital, because students need to feel that their investment in an online course or program is worth it. 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.

How can you guide more online learners toward completing their educational goals?

The importance of institutional assessment with online learners and how they perceive the online student experience is key to retaining them. Satisfaction assessment gives online programs a way to pinpoint those challenges that could lead to dissatisfaction and discontinuation of the program.

Where should you focus your priorities for improving your online programs?

This is where the value of dual satisfaction-priorities assessment is very worthwhile. Satisfaction assessment alone does not identify priorities for improvement and planning. By looking at what students value, your institution can pinpoint top priorities and address major issues that could impact student satisfaction and completion of the program.

What strengths should you emphasize to prospective online learners?

Unlike in-person education, online programs can draw students 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. Surveys also convey a sense of concern for the student, showing the institution cares enough about quality to routinely gather feedback from its students.

Demographic overview

Key demographic characteristics at four-year institutions:					Key demographic characteristics at community colleges:				
GENDER					**GENDER**				
Female		Male			Female		Male		
69%		31%			75%		25%		
AGE					**AGE**				
<24	25-34	35-44	45+		<24	25-34	35-44	45+	
10%	29%	29%	32%		33%	29%	20%	18%	
ETHNICITY					**ETHNICITY**				
Caucasian/White	African American		Hispanic		Caucasian/White	African American		Hispanic	
60%	22%		6%		69%	11%		7%	
ENROLLMENT STATUS					**ENROLLMENT STATUS**				
Primarily online		Primarily on campus			Primarily online		Primarily on campus		
96%		4%			70%		30%		
CLASS LEVEL					**CLASS LEVEL**				
First year	Second year	Third year	Fourth year	Graduate/ Professional	First year	Second year	Third year	Fourth year	
19%	15%	16%	15%	32%	29%	38%	15%	5%	
EMPLOYMENT					**EMPLOYMENT**				
Not employed		Full-time		Part-time	Not employed		Full-time		Part-time
21%		67%		12%	26%		49%		25%
CURRENT ONLINE ENROLLMENT					**CURRENT ONLINE ENROLLMENT**				
1-3 credits	4-6 credits	7-15 credits	>15 credits		1-3 credits	4-6 credits	7-15 credits	>15 credits	
25%	31%	26%	18%		31%	28%	37%	4%	

The gender mix is similar between students enrolled at four-year institutions and those enrolled at community colleges. Online students at community colleges are younger, with more students 24 and under (33 percent vs. 10 percent). More African American students are represented at four-year institutions (22 percent vs. 11 percent). Students at community colleges are more likely to indicate that they are enrolled primarily on campus while also taking online classes (30 percent vs. 4 percent). Four-year online learners are more likely to be graduate students (32 percent), while community college online students are most likely first- or second-year students (67 percent). Both populations reflect high percentages of students employed full-time, but the percentages are higher for students at four-year schools (67 percent vs. 49 percent).

Participating institutions administering the Priorities Survey for Online Learners

Four-year or for-profit institutions

AIU - Online, IL
American College of Education, FL
Amridge University, AL
Argosy University Online, PA
Art Institute Online, PA
Ashford University, IA
Baker College Online, MI
Bellevue University, NE
Bemidji State University, MN
Bethel University, MN
Bon Secours Memorial College of
     Nursing, VA
Bryant & Stratton College, NY
California State University -
     San Bernardino, CA
Capella University, MN
Capitol Technology University, MD
Carlow University, PA
Central Washington University, WA
Champlain College, VT
City College of Fort Lauderdale, FL
Colorado State University -
     Global Campus, CO
Colorado Technical University –
     Colorado Springs, CO
Columbia College, MO
Columbia Southern University, AL
Corban University, OR
Crown College, MN
CUNY School of Professional
     Studies, NY
Dakota State University, SD
Dakota Wesleyan University, SD
Daytona State College, FL
Education Futures Group, TX
Everglades University, FL
Excelsior College, NY
Fort Hays State University, KS
Friends University, KS
Gardner-Webb University, NC
Henley-Putnam University, CA
Hope International University, CA
Indiana Tech, IN
Indiana Wesleyan University, IN
Jones International University, CO
Kettering College, OH
King University, TN
LeTourneau University, TX
Liberty University, VA
Lincoln College of New England, CT
Linfield College, OR

Loyola University New Orleans, LA
Master's College & Seminary, ON
Metropolitan State University, MN
Mississippi State University, MS
Missouri Baptist University, MO
Nebraska Methodist College, NE
New Mexico State University -
     Main Campus, NM
Northcentral University, AZ
Northwood University, MI
Ohio Christian University, OH
Oklahoma Wesleyan University, OK
Patrick Henry College, VA
Patten University, CA
Post University, CT
Rasmussen College, MN
Regis University, CO
Rider University, NJ
Saint Mary-of-the-Woods College, IN
Savannah College of Art
     and Design, GA
South University Online, PA
Southwestern Assemblies of God
     University, TX
Spring Arbor University, MI
St. John Fisher College, NY
Strayer University, DC
Sullivan University, KY
Texas Woman's University, TX
The College of Westchester, NY
Trident University International, CA
Troy University, AL
University of Charleston, WV
University of Illinois Springfield, IL
University of Mary, ND
University of Maryland
     University College, MD
University of North Carolina
     Wilmington, NC
University of Saint Francis, IN
University of San Francisco, CA
University of St. Francis, IL
University of the Rockies, CO
University of Wisconsin-Stout, WI
University of Wisconsin-Superior, WI
Utica College, NY
Valley City State University, ND
Virginia College, AL
Virginia Commonwealth University, VA
Walden University, GA
Westwood College Online, CO
Wilmington University, DE

Community colleges or two-year institutions

Allen Community College, KS
Augusta Technical College, GA
Bismarck State College, ND
Brookhaven College, TX
Central Lakes College, MN
Cloud County Community College, KS
College of the Ouachitas, AR
Cowley County
     Community College, KS
Cuyahoga Community College, OH
Dallas Colleges Online, TX
Florence-Darlington
     Technical College, SC
Front Range Community College, CO
Georgia Military College, GA
Georgia Northwestern
     Technical College, GA
Great Falls College Montana
     State University, MT
Gwinnett Technical College, GA
Inver Hills Community College, MN
Isothermal Community College, NC
Mesa Community College, AZ
Mississippi Gulf Coast
     Community College, MS
Mitchell Technical Institute, SD
Moberly Area Community College, MO
Monterey Peninsula College, CA
New Mexico State University
     at Alamogordo, NM
North Dakota State College
     of Science, ND
Oklahoma State University Institute of
     Technology-Okmulgee, OK
Piedmont Technical College, SC
Rio Salado College, AZ
San Juan College, NM
Schoolcraft College, MI
Shoreline Community College, WA
South Central College, MN
State Fair Community College, MO
Tulsa Community College, OK
Volunteer State Community
     College, TN
Wayne Community College, NC
Western Wyoming Community
     College, WY
Williston State College, ND
Yavapai College, AZ

About the survey instrument used in this report

The Priorities Survey for Online Learners helps institutions identify and prioritize issues in their online courses and assesses issues unique to online learning. To see samples and learn more, visit www.RuffaloNL.com/PSOL.

About Ruffalo Noel Levitz

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Questions about this paper?

Please email ContactUs@RuffaloNL.com. We can discuss the findings, as well as ways you can assess your current students and engage your alumni.

HOW TO CITE THIS REPORT

Ruffalo Noel Levitz (2016). *2015-16 national online learners satisfaction and priorities report.* Cedar Rapids: Ruffalo Noel Levitz.

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