

O S S

ONLINE STUDY SURVEY



NATIVES GLOBAL
CONSULTING

2018/19

In an ever-increasing online world, it's unsurprising that the online education provision is growing. Students do almost everything online, from shopping and dating to social networking - **but how do they feel about studying online?**



CONTENTS

Introduction	04
Methodology	05
Section 1: Demographics and Personas	06
Section 2: Key Findings	13
Section 3: Conclusion	29
About Natives Global Consulting	32

WHY IS IT SO HARD TO JUDGE THE LANDSCAPE?

Robust data on what the online student recruitment landscape looks like in the UK is a challenge. However, what is agreed, is that online learning has seen an overall decrease of 0.5% in England, however, the OBHE (The Observatory on Borderless Higher Education)* still expects overall online education to increase as more students continue to seek an overseas education. Taking this into account, along with the limitations of student visas for international students in the UK and the EU Referendum, it's possible that online provision is going to become even more important to the UK education sector.

With a lack of robust data, it is extremely challenging for decision-makers at institutions to make well-informed choices about which subject areas will be successful for them in the online space.

The Online Study Survey is for decision-makers, marketers, admissions advisers and senior leaders within the Private and Public Higher Education sector, to give a more detailed understanding of prospective students attitudes, media consumption behaviours and perceived barriers.

The Online Study Survey was designed to identify which types of students were open to online learning, how to reach these students and what marketers and institutions need to know to engage and enrol these students on to their programmes.

*OBHE (The Observatory on Borderless Higher Education) <http://monitor.icef.com/2018/09/study-explores-adoption-of-online-learning-and-its-relationship-to-student-mobility/>

ABOUT THE ONLINE STUDY SURVEY

The Online Study Survey was launched to offer higher education providers vital market and audience intelligence on which to base strategic decisions about the provision of online learning. With the aim of providing insight into student motivations and the demand and attitudes toward online learning.

Throughout this report, preconceived ideas about prospective online learners are challenged by the findings. Do you know the ways in which prospective students are accessing online courses before committing to studying a postgraduate course online? Just what is the gap between perceived and actual value? And what types of media do prospective students consume on a daily basis? All this, and more, is uncovered.

The Online Study Survey was open to all students studying, or who studied at, a UK university; this included current and prospective undergraduate students, current and prospective postgraduate students and graduates.

Every university in the UK was invited to collaborate on the survey by the Insights Division at Natives Global Consulting, along with a panel of students from the Student Hut Opinion Panel. In total, the Insights Division analysed over 250,000 different data points and conducted 2,164 deep-dive surveys with students from across 119 different UK institutions.

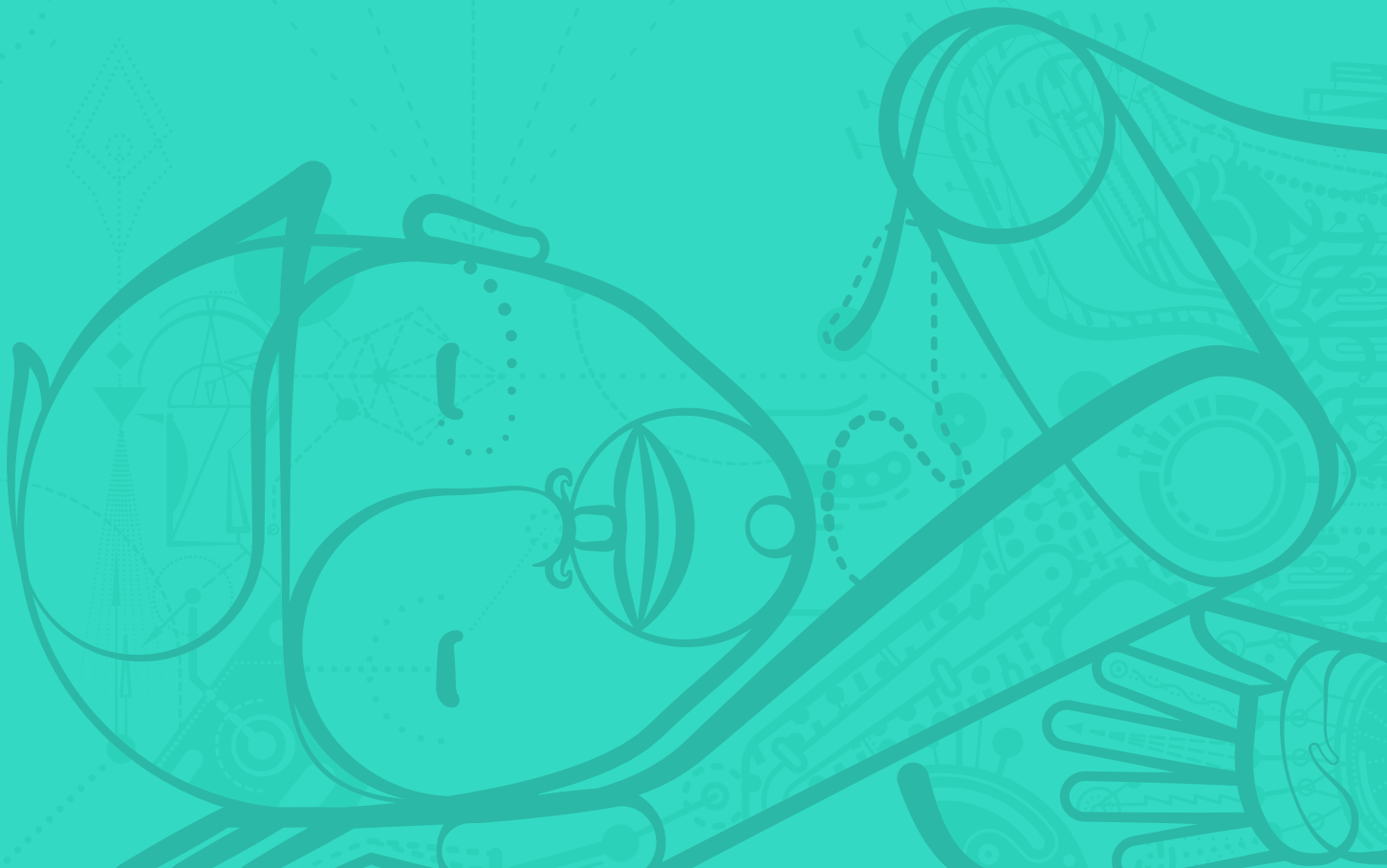
The survey was open from 15th May 2018 until 31st July 2018.

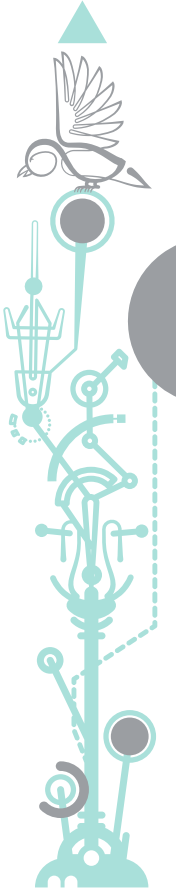
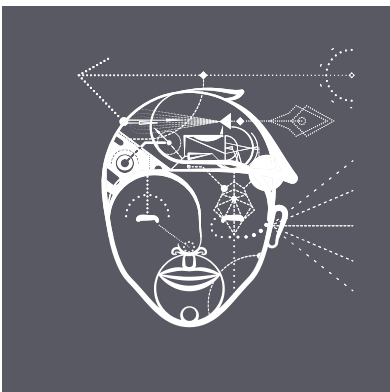
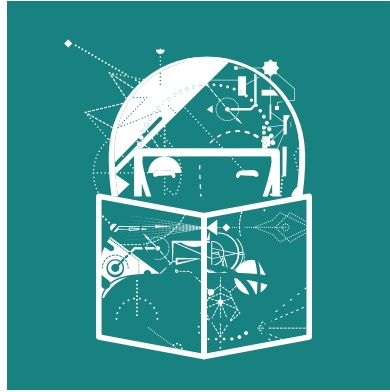
Equal weighting was given to each participant's response.

METHODOLOGY



SECTION 1: DEMOGRAPHICS AND PERSONAS





Respondents from the Online Study Survey were all categorised into five key distinct audience groups; current postgraduate online learners, those open to studying postgraduate courses online, current postgraduate learners, those open to traditional postgraduate study, and those not interested in postgraduate study at all. We have presented these audience groups here as personas.

The personas reveal different characteristics beyond what might be typically assumed of a prospective online student, compared to current students and online alumni - illustrating how the audience is changing over time and what creative and messaging will resonate.

WHO IS IN OUR SAMPLE?

CURRENT POSTGRADUATE ONLINE LEARNER

Students that are currently studying their postgraduate qualification through either 100% online or distance learning.

GENDER

50% FEMALE 50% MALE

POPULAR PUBLISHERS

theguardian

BBC Daily Mail

MARITAL STATUS

MOSTLY SINGLE

59%

DAILY SOCIAL MEDIA USAGE

f 56% **yt** 47% **ig** 38%

MOST LIKELY TO USE WHATSAPP
FOR DAILY COMMS

AVERAGE AGE

34

EMPLOYMENT DETAILS

INTERMEDIATE
MIDDLE MANAGEMENT

INTERESTS



SUBJECTS MOST LIKELY TO HAVE
STUDIED AT UNDERGRADUATE LEVEL

PSYCHOLOGY 1

ENGINEERING 2

HISTORY 3



OPEN TO POSTGRADUATE ONLINE STUDY

Students that are interested in studying postgraduate in an online format.

GENDER

77% FEMALE 23% MALE

POPULAR PUBLISHERS

BBC COSMOPOLITAN
theguardian

MARITAL STATUS

MOSTLY SINGLE

88%

DAILY SOCIAL MEDIA USAGE

f 80%  72%
 56%

MOST LIKELY TO USE FACEBOOK
MESSENGER FOR DAILY COMMS

AVERAGE AGE

21

EDUCATION

66%
FULL-TIME STUDY

INTERESTS

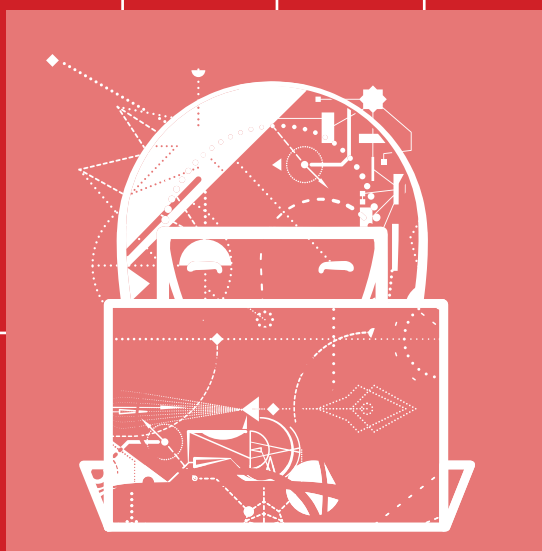


SUBJECTS MOST LIKELY TO HAVE
STUDIED AT UNDERGRADUATE LEVEL

PSYCHOLOGY 1

ENGLISH 2

HISTORY 3



CURRENT POSTGRADUATE LEARNER

Students that are currently studying their postgraduate qualification through 100% face-to-face learning.

GENDER

72% FEMALE 28% MALE

POPULAR PUBLISHERS

theguardian

BBC The Economist

MARITAL STATUS

MOSTLY SINGLE

74%

DAILY SOCIAL MEDIA USAGE

f 81%  72%  56%

MOST LIKELY TO USE WHATSAPP
FOR DAILY COMMS

AVERAGE AGE

27

EDUCATION

58%
FULL-TIME STUDY

INTERESTS



SUBJECTS MOST LIKELY TO HAVE
STUDIED AT UNDERGRADUATE LEVEL

PSYCHOLOGY 1

ENGLISH 2

HISTORY 3



OPEN TO TRADITIONAL POSTGRADUATE STUDY

Students who are interested in studying postgraduate but only through a face-to-face method.

GENDER

67% FEMALE 33% MALE

POPULAR PUBLISHERS

theguardian

BBC BuzzFeed

MARITAL STATUS

MOSTLY SINGLE

84%

DAILY SOCIAL MEDIA USAGE

f 69%  54%
 53%

MOST LIKELY TO USE FACEBOOK MESSENGER FOR DAILY COMMS

AVERAGE AGE

21

EDUCATION

68%
FULL-TIME STUDY

INTERESTS



SUBJECTS MOST LIKELY TO HAVE STUDIED AT UNDERGRADUATE LEVEL

HISTORY 1

PSYCHOLOGY 2

CHEMISTRY 3



NOT INTERESTED IN POSTGRADUATE STUDY

Students who are not interested in progressing from undergraduate to postgraduate.

GENDER

70% FEMALE 30% MALE

POPULAR PUBLISHERS

Daily Mail

BBC



MARITAL STATUS

MOSTLY SINGLE

91%

DAILY SOCIAL MEDIA USAGE



82%



72%



67%

MOST LIKELY TO USE FACEBOOK
MESSENGER FOR DAILY COMMS

AVERAGE AGE

21

EDUCATION

59%
FULL-TIME STUDY

INTERESTS



SUBJECTS MOST LIKELY TO HAVE
STUDIED AT UNDERGRADUATE LEVEL

BUSINESS

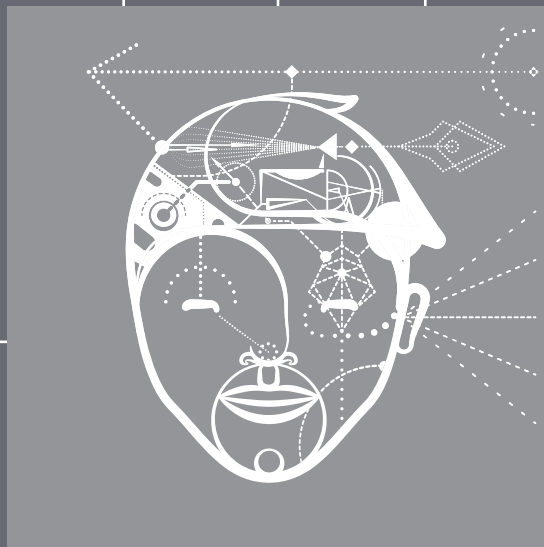
1

MEDICINE

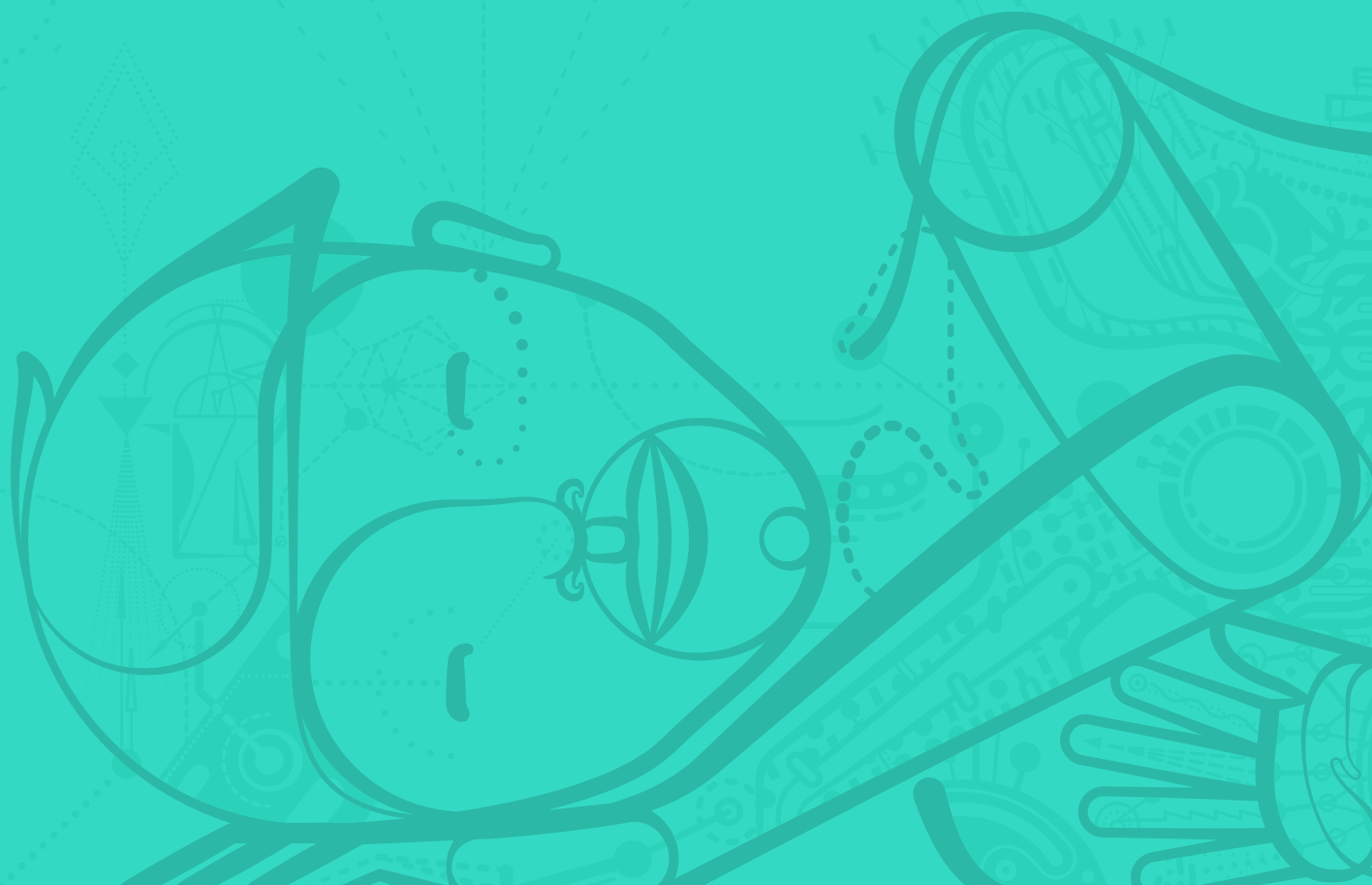
2

ENGINEERING

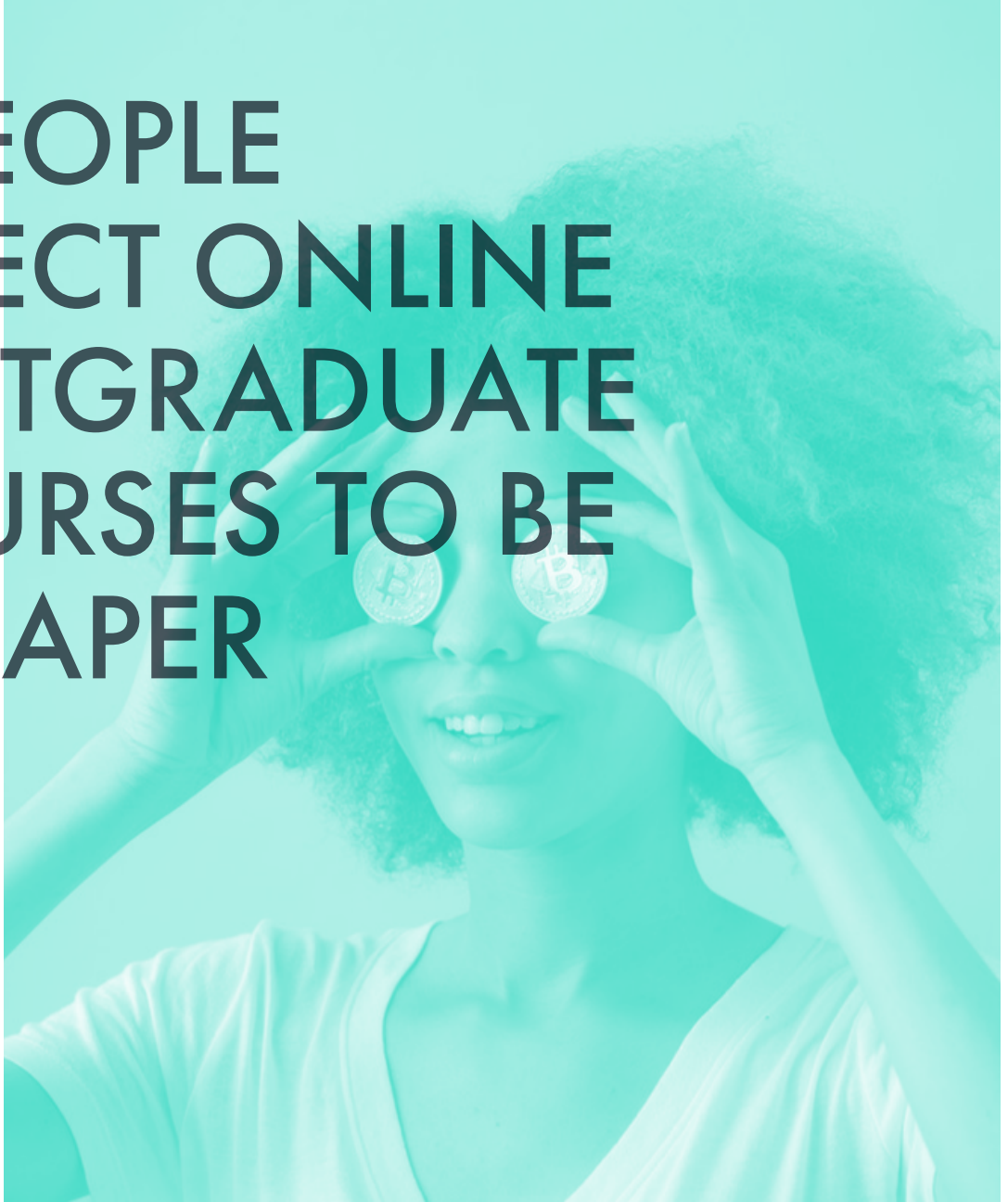
3



SECTION 2: KEY FINDINGS



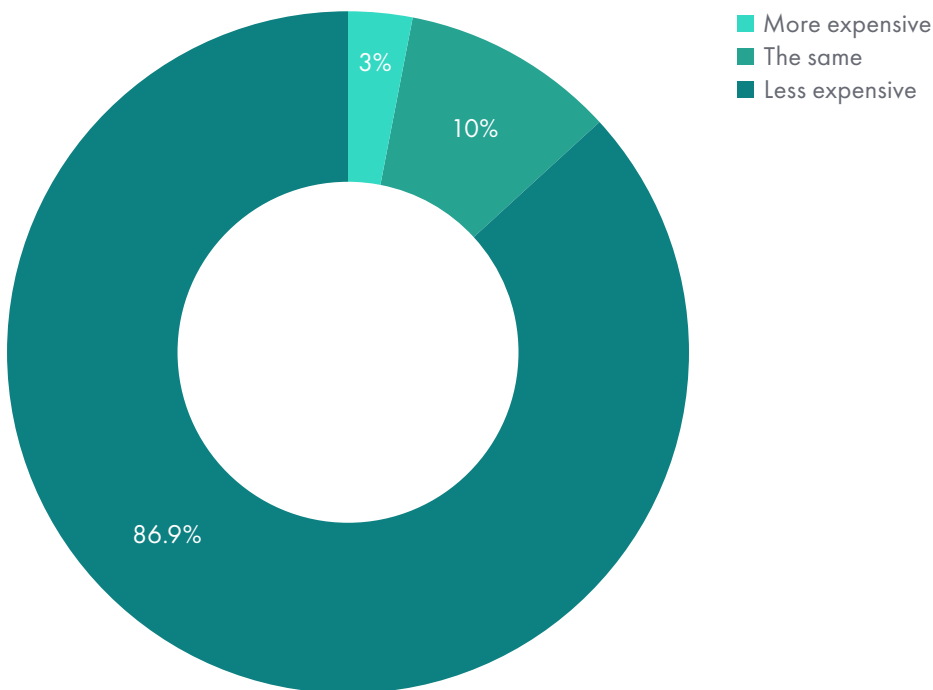
1. PEOPLE EXPECT ONLINE POSTGRADUATE COURSES TO BE CHEAPER



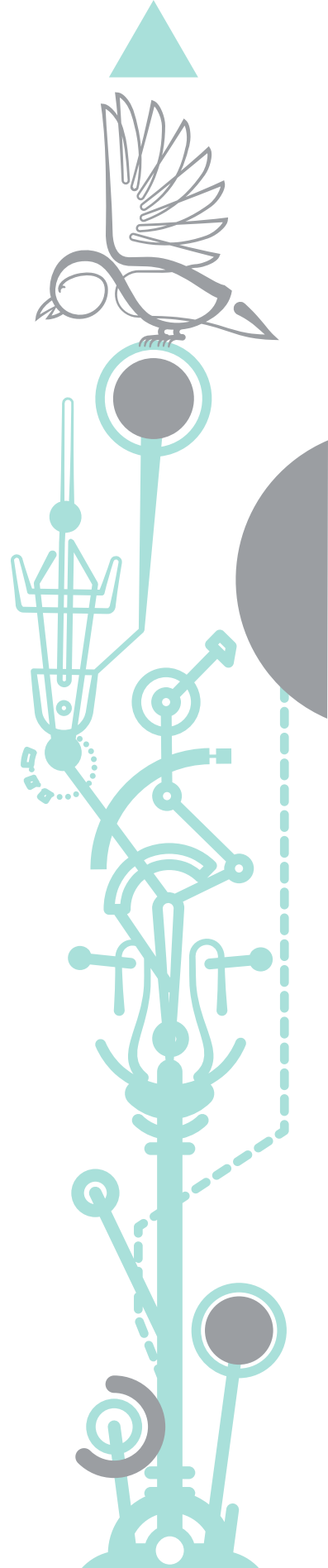
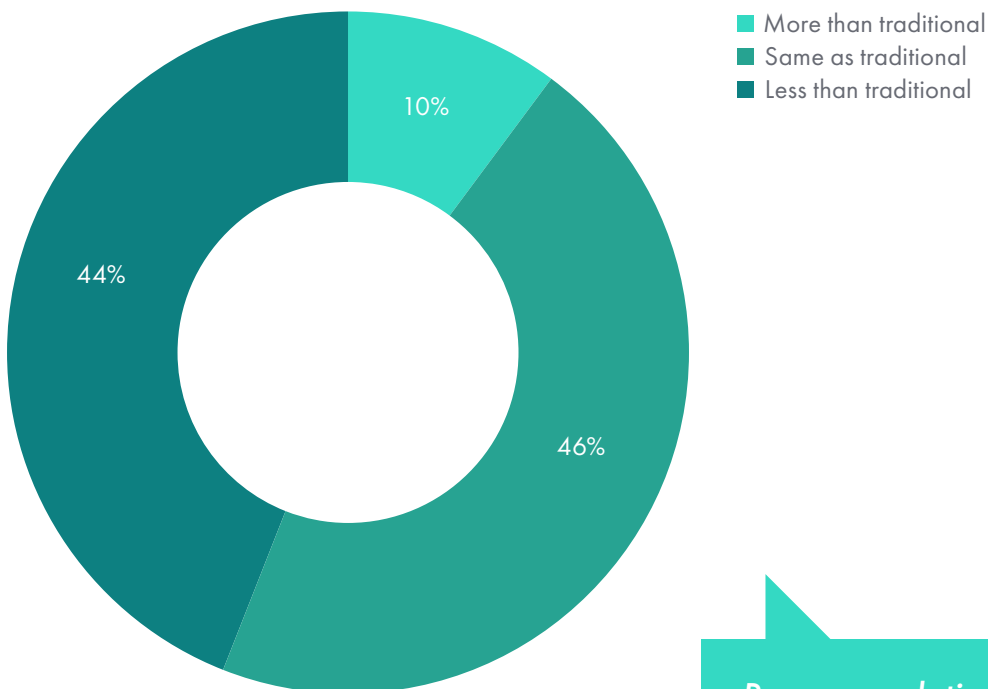
A huge 86% of our sample expected an online postgraduate course to be cheaper than a traditional postgraduate course. This finding appears to be related to time, either in terms of saving time by not having to travel, or the number of hours a week that it would take to study.

Is it possible that students believe you pay less for fewer hours when it comes to an online postgraduate course? Or is it the belief that you pay more for the course but get the same or fewer hours for your money? Either way, knowing that people's expectations differ from reality when it comes to the cost of an online postgraduate course can help you shape your communications in a way that will address the gap in expectation vs reality.

HOW WOULD YOU EXPECT THE COST OF AN ONLINE POSTGRADUATE COURSE TO COMPARE TO A TRADITIONAL (FACE-TO-FACE) POSTGRADUATE COURSE?



HOW DOES THIS NUMBER OF HOURS PER WEEK COMPARE TO WHAT YOU WOULD EXPECT FROM A TRADITIONAL (FACE-TO-FACE) POSTGRADUATE COURSE?



Recommendation: set realistic expectations about the cost of online learning, ensuring that messaging is clear and provides information that allows students to know exactly what they get for their money so that they can make an informed decision.

2. FLEXIBILITY IS A KEY PERCEIVED DIFFERENCE BETWEEN ONLINE AND TRADITIONAL POSTGRADUATE LEARNING

And flexibility is what online learners like the most about the format of online study.

When asked about perceived advantages to studying online, three of the four most frequently selected options for all respondent groups were related to flexibility - 'fitting around other commitments' 'no travel', and, 'opportunity to study at an institution in another country without moving'.

When online postgraduate learners were asked what they like about the format of their course, aspects around flexibility were most frequently stated, and these reasons centred around being in control of the timing and pace of their

As a single parent of two, I want to better my skills and job prospects. However, committing to a traditional way of university (in person) is hard for me as I don't have help with my kids. So this way I can work from home or anywhere... work flexible around my children and still better myself.

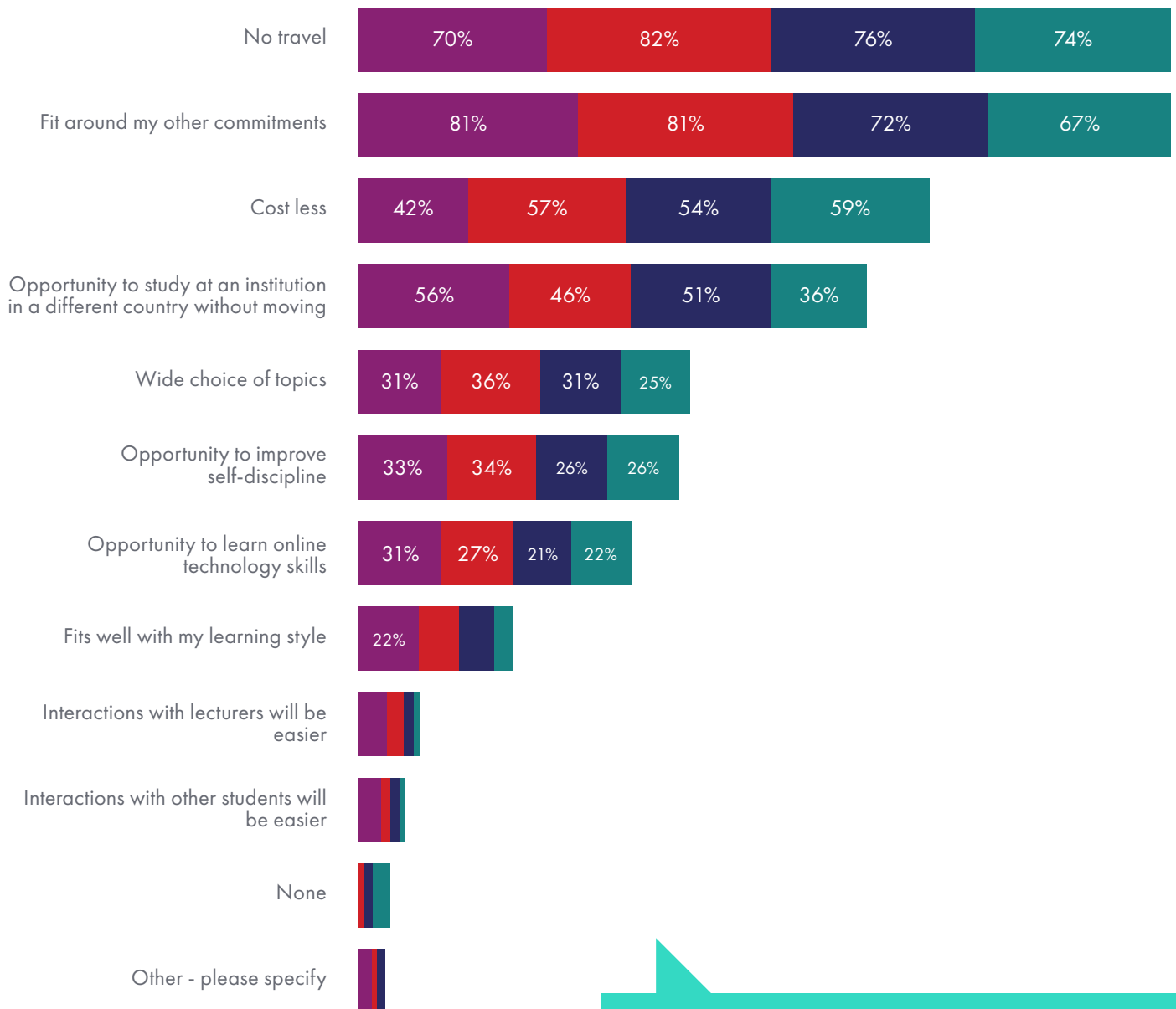
learning, fitting around family and work commitments, and not having to travel.

Furthermore, the research found that broadly speaking, the expectations of those that were most open to online study aligned with those that were current online learners. Those that are

studying a postgraduate course traditionally, or were open to traditional study, had a broader perception of online study fitting around other commitments. There was also differentiation for the 'opportunity to study at an institution from a different country without moving'. Institutions who would like to target these groups can use this in their messaging to increase interest and awareness.

WHAT, IF ANY, ARE THE ADVANTAGES OF STUDYING AN ONLINE POSTGRADUATE COURSE?

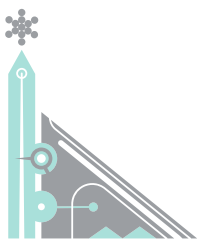
■ Current Postgraduate Online Learner
■ Open to Postgraduate Online Study
■ Current Postgraduate Learner
■ Open to Traditional Postgraduate Study



Recommendation: The flexibility of studying online should be a key message in your marketing strategy. Think about the pros of your online provision that revolve around flexibility and use this in your promotion and content hubs. Use your own data to identify your micro-influencers amongst current students and alumni and amplify your message through a comprehensive content and influencer strategy. Highlighting how your online courses provide flexibility to students so that they still have time to focus on other life commitments or stay at home and study in their home country will resonate with those interested in choosing an online postgraduate education over a more traditional route.



3. OPENNESS TO ONLINE LEARNING DOESN'T NECESSARILY MEAN STUDENTS HAVE HAD PREVIOUS EXPERIENCE OF ONLINE LEARNING



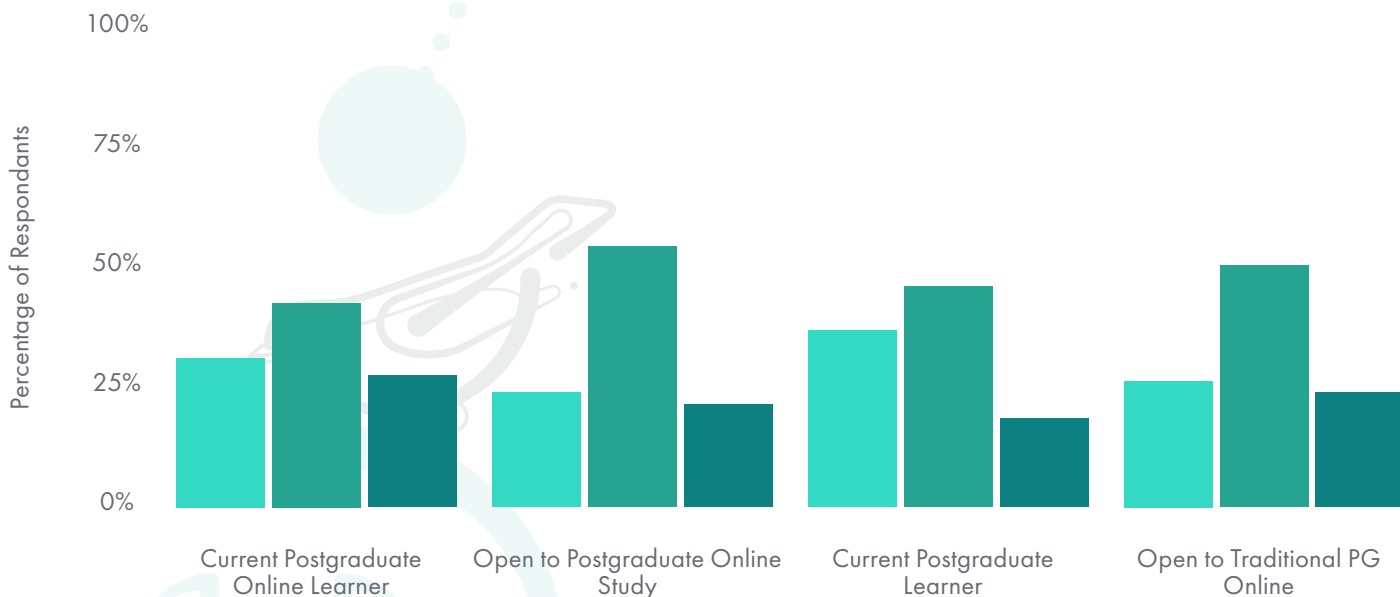
Most respondents from the survey had no experience of MOOCs. For those currently studying online, we saw that a higher percentage of this group had 'lots' of experience with MOOCs compared to other groups (15% vs 3%), but only 2% of the Open to Postgraduate Online Study 'group' reported 'lots' of experience.

Respondents had more experience with YouTube tutorials in general, but this did not differ much between groups. Therefore, having previous experience of studying online is not a factor that contributes to an openness to online learning.

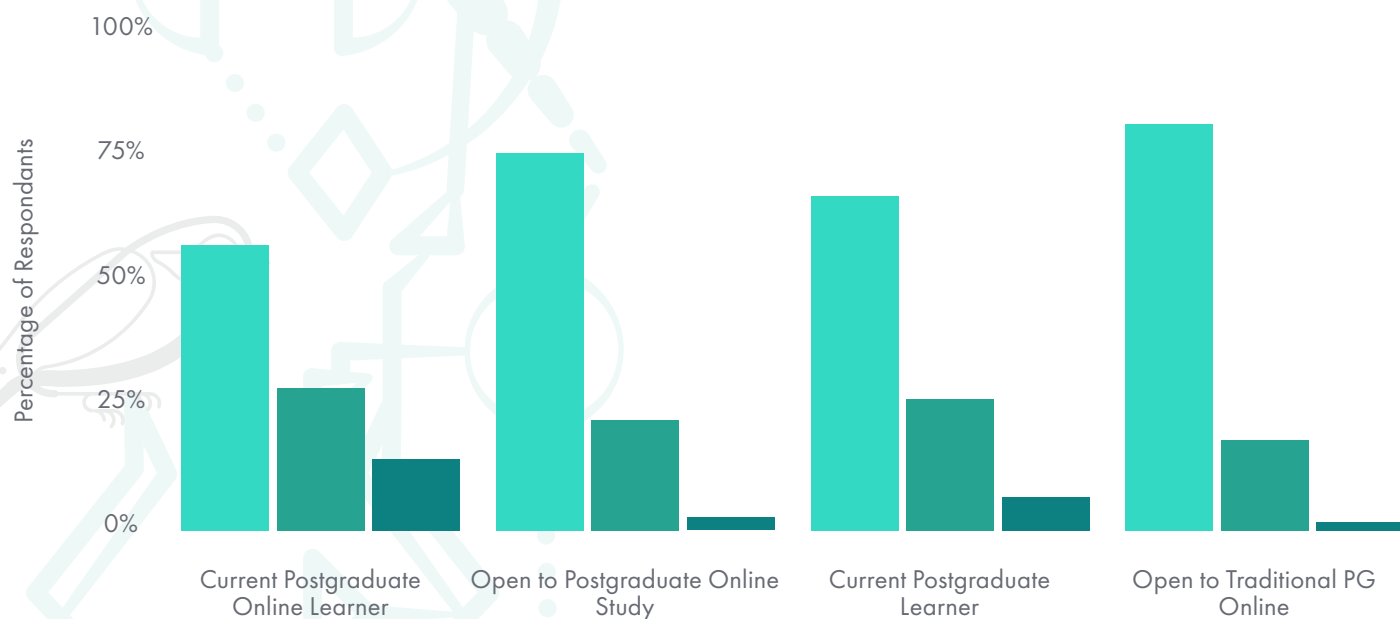
WHAT LEVEL OF EXPERIENCE DO YOU HAVE WITH THE FOLLOWING TYPES OF ONLINE LEARNING?

None
Some
Lots

YOUTUBE TUTORIALS:



MOOCs:



Recommendation: Consider investing in YouTube tutorials, but, ensure that you are working on your full online offering and not excluding those who haven't studied online before in your targeting, as many online learners have had little experience of studying online. If your institution is heavily investing in MOOCs and YouTube tutorials exclusively, then the research indicates that you may wish to revisit this as a core strategy and diversify your approach.

4. PERCEIVED BARRIERS TO ONLINE LEARNING



Lack of face-to-face interaction was the top barrier across all respondent groups and was particularly high for those only open to traditional postgraduate study (75%).

Qualitative data suggests that the primary impact respondents thought this would have was centred around less motivation, loneliness and isolation, and the inability to have discussions and ask questions. In addition, 'lack of technology skills' appears to be a barrier for those already studying online (33%) compared to those open to studying online (13%). In particular, postgraduate online learners mentioned that 'learning how to navigate the platform', 'understanding the internet' and 'ability to use a computer' were specific barriers. Interestingly, 48% of respondents overall thought that an online qualification would be less respected, this was highest for those open to traditional postgraduate (52%), and lowest for online postgraduate learners (although still 35%). When asked why, many did not give a particular reason, just that the reputation of online study was worse compared to a traditional postgraduate qualification. But there were also perceptions around online courses being 'easier', or that it was a 'lazier and less dedicated option', that it was not a 'real'

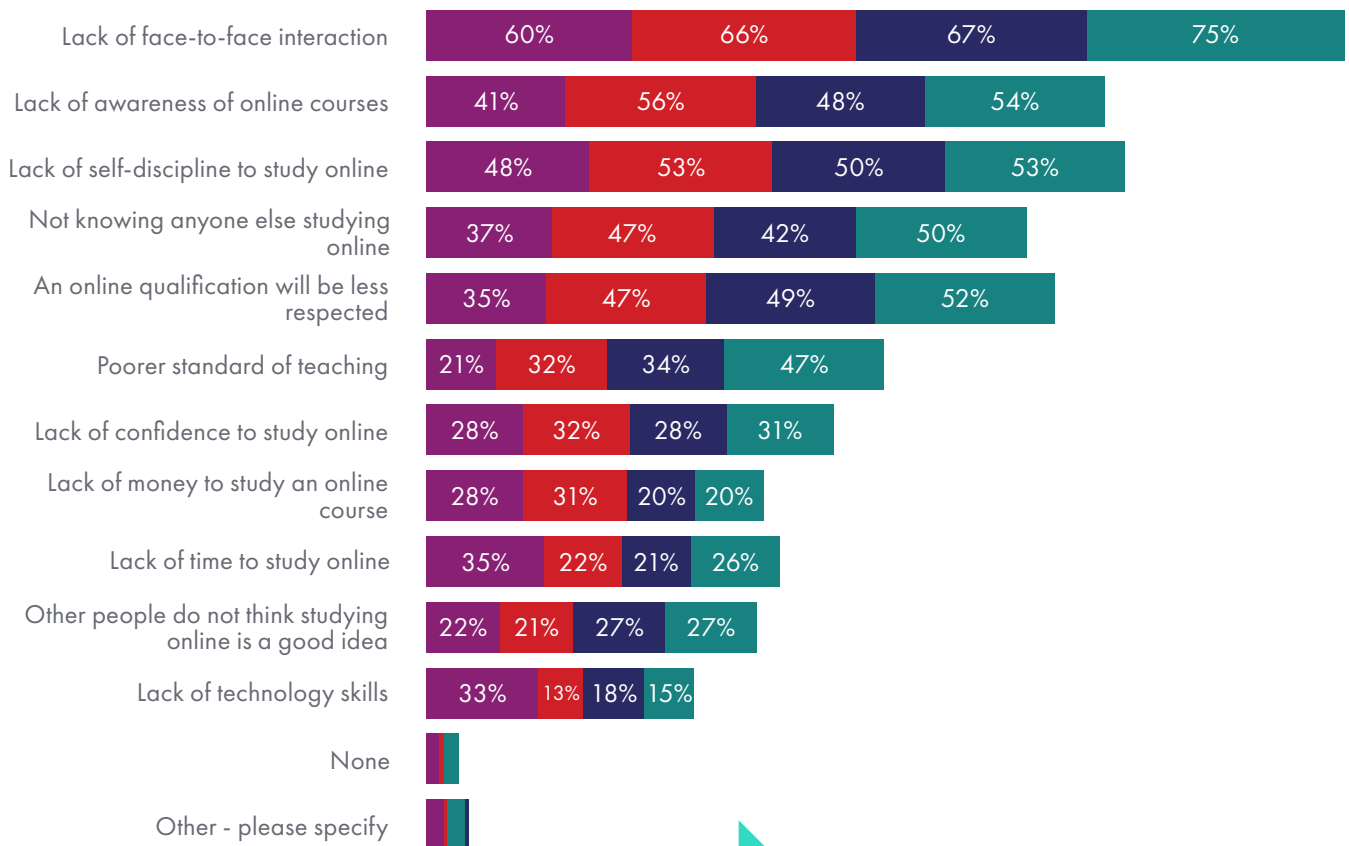
degree, or that it may not be from a prestigious institution.

47% of those who were only interested in traditional postgraduate study selected 'poorer standard of teaching' as a barrier to online learning, with qualitative responses suggesting this was due to having less discussion time with others and a lower rate of responsiveness from lecturers. These reasons were also given by those interested in online postgraduate study who selected 'poorer standard of teaching' as a barrier. However, it's interesting to compare this figure with those currently studying online where only 21% of this group selected 'poorer standard of teaching' as a barrier. Furthermore, the Net Promoter Score was higher for those currently studying an online PG course (37) than those currently studying PG traditionally (10). The case for a positive experience and a high standard of teaching can be made on your behalf by current students and alumni, and in turn, used in your messaging and promotion.

Another commonly perceived barrier to online learning was awareness, with almost half of each respondent group stating that 'awareness of online learning provision' was a barrier for them.

WHAT, IF ANY, ARE THE DISADVANTAGES OF STUDYING AN ONLINE POSTGRADUATE COURSE?

■ Current Postgraduate Online Learner
■ Open to Postgraduate Online Study
■ Current Postgraduate Learner
■ Open to Traditional Postgraduate Study

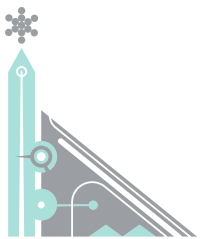


Recommendation: Find ways to promote interaction and ensure online meetings where students can see each other to limit the impact of a perceived lack of face-to-face interaction. Create content hubs and support around tips for improving self-motivation and time-management to include in your overall marketing strategy.

To help improve perceptions around respect and standards of teaching be clear about what it is the course offers, the methods of teaching and the course's structure. As before, a micro-influencer engagement strategy can amplify your alumni testimonials and engage your staff in telling real stories about the career prospects available, whilst simultaneously promoting your institution's standard of teaching. Use the personas outlined earlier in this report to help with your channel selection and be strategic with any advertising spend by identifying where your target audience is spending their time online.



5. PEOPLE DON'T KNOW WHAT AN ONLINE POSTGRADUATE COURSE WOULD LOOK LIKE



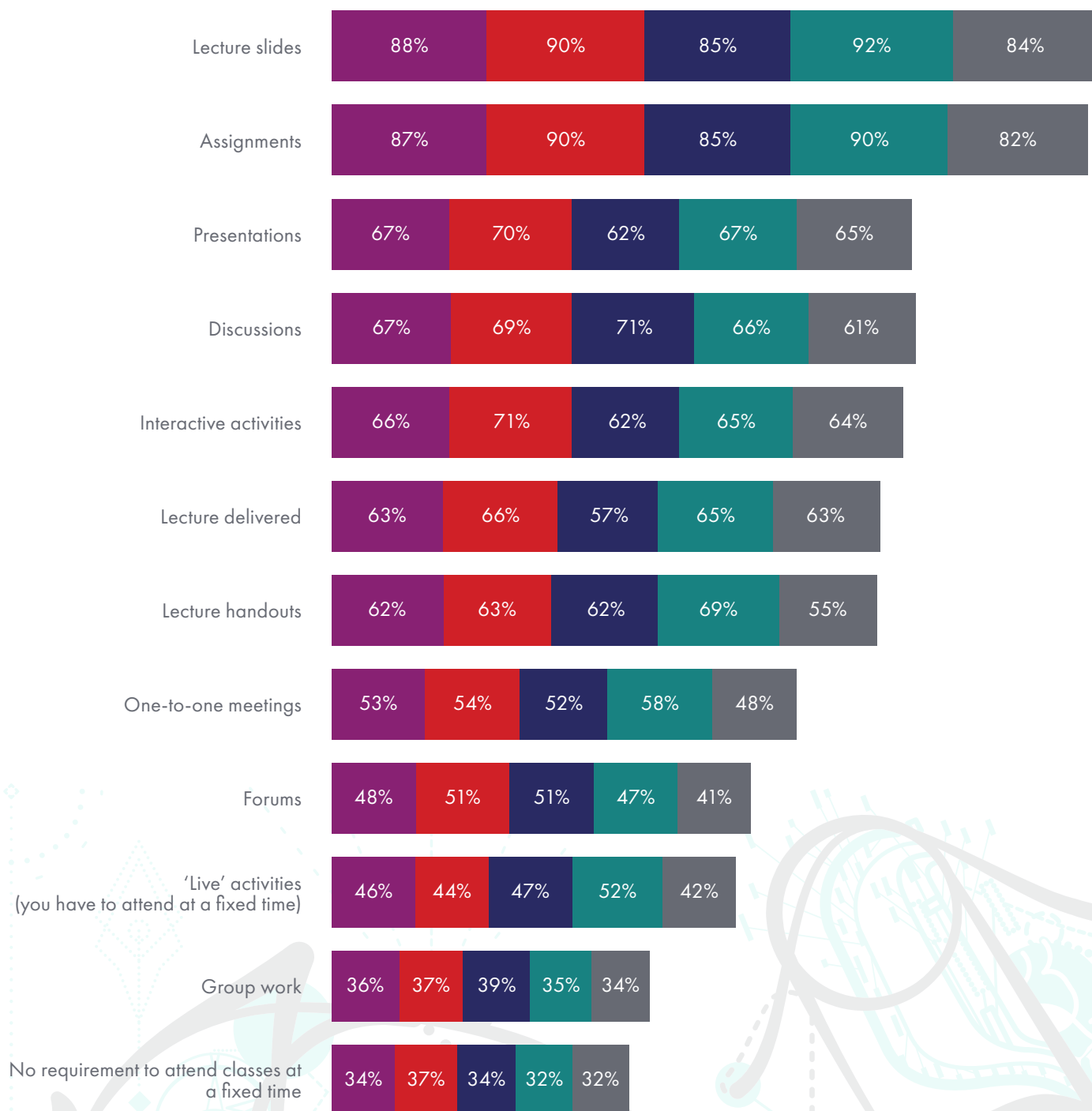
There were varied expectations about what would be included in an online postgraduate course, with agreement across all groups that they expect lecture slides and assignments to be included.

Just under a third of respondents did not expect lecture handouts, delivery of lectures,

presentations, interactive activities and discussions to be included in an online postgraduate course, and only a third of respondents expected group work. Some respondents expected to attend classes at a fixed time (46%), and others expected there to be no requirement to participate in classes at a set time (34%).

IF YOU WERE TO STUDY AN ONLINE UNDERGRADUATE OR POSTGRADUATE COURSE, WHICH OF THE FOLLOWING WOULD YOU EXPECT TO BE INCLUDED?

- Current Postgraduate Online Learner
- Open to Postgraduate Online Study
- Current Postgraduate Learner
- Open to Traditional Postgraduate Study
- Not Interested in Postgraduate Study



Recommendation: Set realistic expectations about online learning and what that means for the courses you're offering. Create content that supports and provides tips for improving self-motivation and time-management to include in your overall marketing strategy.

6. PROSPECTIVE LEARNERS USE A VAST VARIETY OF MEDIA ON A DAILY BASIS



Students continue to consume a vast variety of media, daily. Those open to postgraduate online learning use Facebook (80%), Instagram (72%) and Snapchat (60%) on a daily basis. This new generation of prospective learners also consume media on YouTube and Twitter regularly.

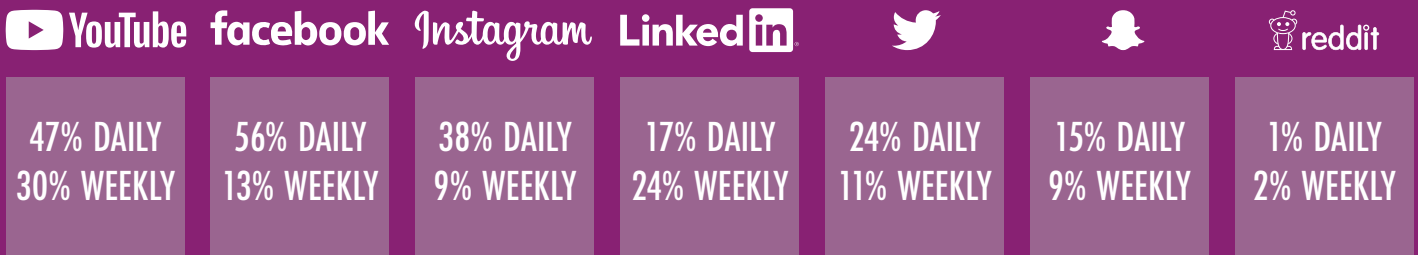
This is in somewhat of a contrast to current online learners, who whilst also consuming a wide variety of new media, tend to use Facebook (56%), YouTube (47%) and Instagram (38%). They also consume media on these platforms and channels less frequently, demonstrating how quickly trends can change in the student recruitment landscape and that marketers need to be agile to such changes.

Also of note is the traditional media consumed by both groups. Premium, news-based publishers dominate their selection.

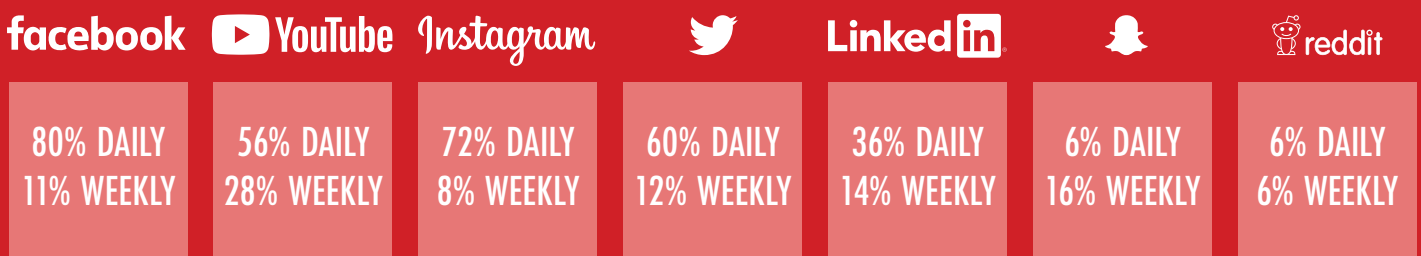
Recommendation: Prospective postgraduate students continue to use a huge variety of media, daily. This data will help you to understand which platforms to prioritise when it comes to organic or paid media. On a granular level, we found a notable variation between specific institutions, which may indicate that taken at a national level, the research may not work for your own specific institutions. Therefore, it is essential that you know and understand your own data. Conduct a deep-dive qualitative and quantitative research project so that you have bespoke findings with which to shape your strategy. Run a market analysis to discover whether the perceptions and barriers of online education are in line with this report's national findings.

Develop a full-funnel creative and advertising strategy that uses the information within this report as well as your institution's own data, differentiated depending on who you are targeting. A strategically developed marketing strategy should be complemented with relevant content to support all phases of your prospective online learner journey; from awareness, through consideration, intent, decision and eventually, enrolment.

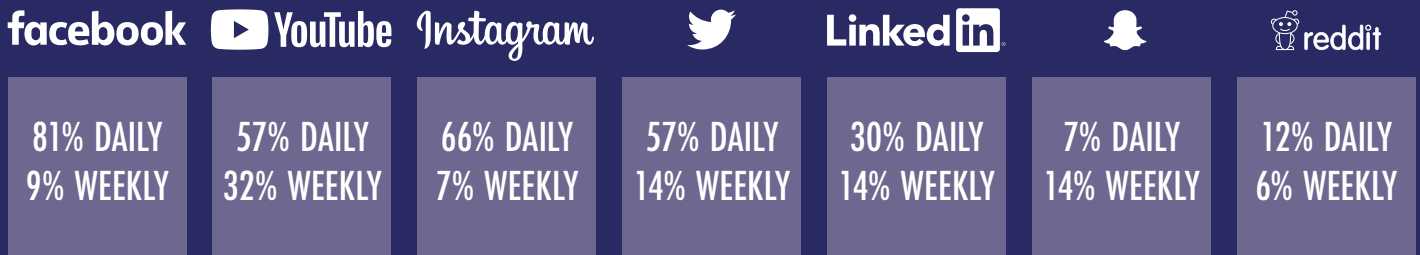
CURRENT POSTGRADUATE ONLINE LEARNERS:



OPEN TO POSTGRADUATE ONLINE STUDY:



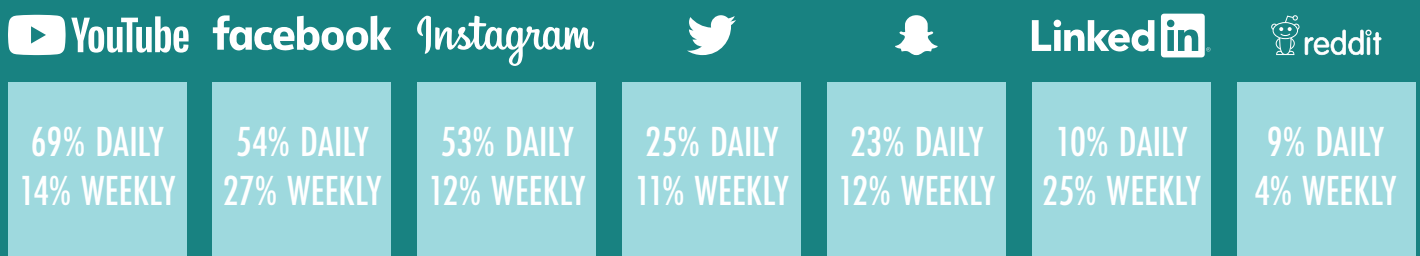
OPEN TO TRADITIONAL POSTGRADUATE STUDY:



BBC theguardian

BuzzFeed VOGUE

CURRENT TRADITIONAL POSGRADUATE LEARNERS:



theguardian

The INDEPENDENT

The Economist

The Telegraph

BBC

BuzzFeed

7. YOUR ONLINE PORTFOLIO MATTERS TO PROSPECTIVE ONLINE LEARNERS



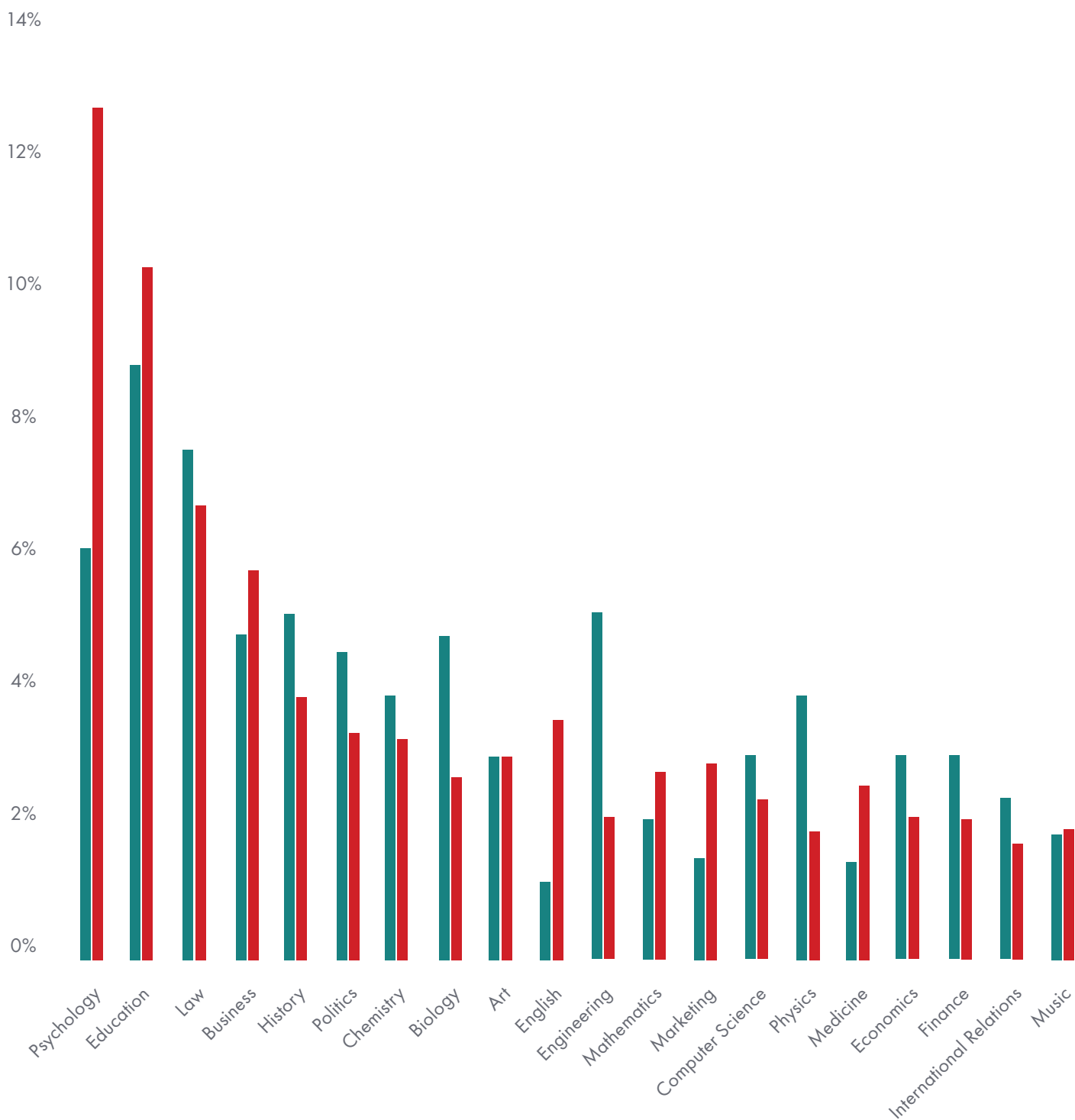
Online learners are more likely to want to study Psychology than traditional postgraduate learners, and traditional STEM learners prefer face-to-face provision.

When prospective students were asked what subjects they were interested in studying at postgraduate level, those who were open to online study were more likely to say 'Psychology' than traditional learners (12% of the sample versus 6% respectively).

The data also shows that those interested in studying STEM programmes are more likely to be looking for this through face-to-face provision than online (Chemistry 4% versus 3%, Biology 5% versus 3%, Engineering 5% versus 2%, Computer Science 3% versus 2%, Physics 4% versus 2% and Finance 3% versus 2%) with only mathematics bucking the trend slightly with a greater proportion of online students looking to study this over traditional students.

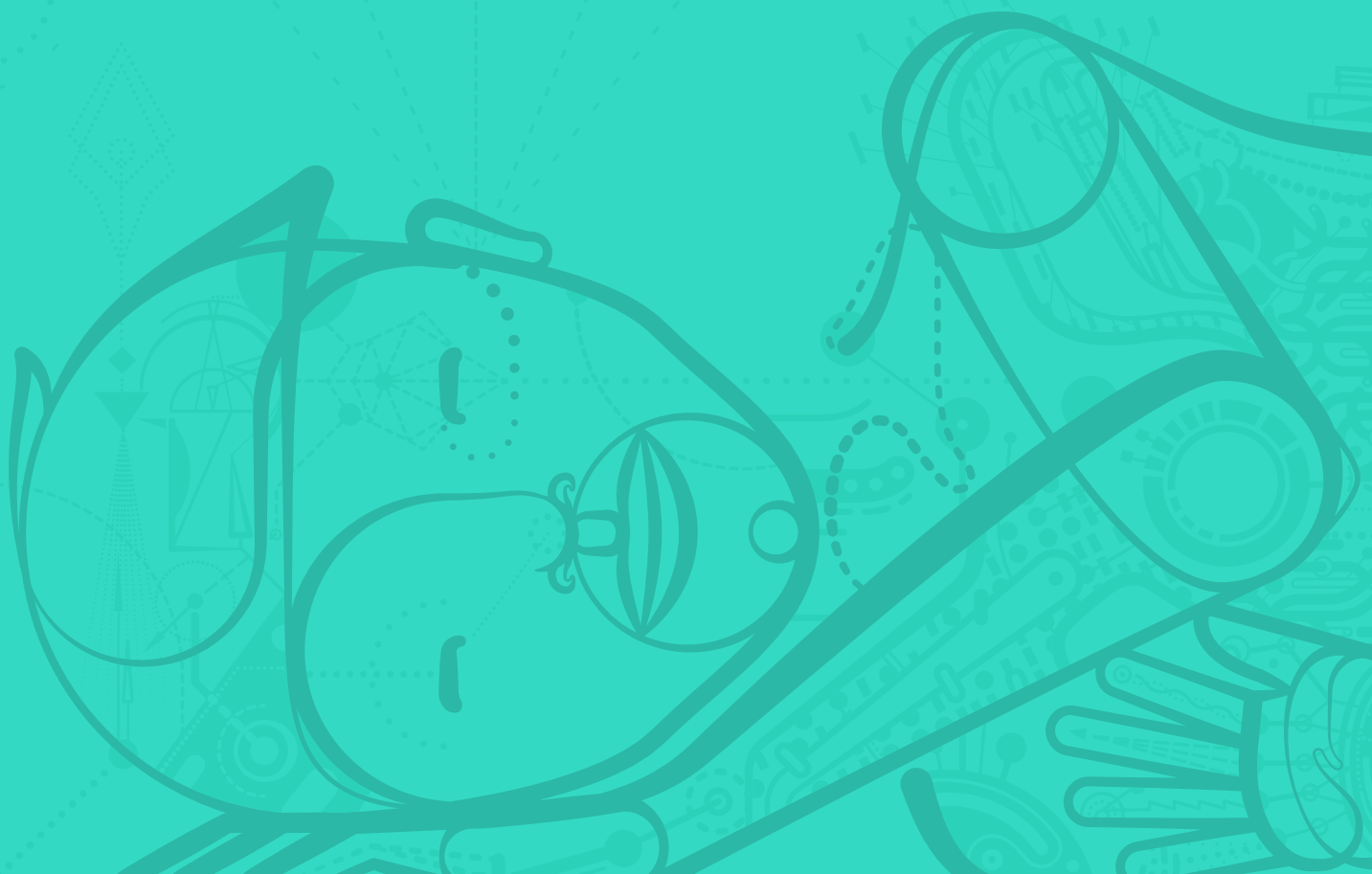
PLEASE LIST ANY POSTGRADUATE COURSE AND/OR SUBJECTS THAT YOU WOULD CONSIDER STUDYING:

■ Open to Traditional Postgraduate Study
 ■ Open to Postgraduate Online Study



Recommendation: With course subject a clear indicator of the openness to studying online, it's important for HEIs marketing their online provision to provide detailed and engaging course-level messaging and understand that your campaigns may need to work harder to promote specific courses.

SECTION 3: CONCLUSION




CONCLUSION

The content of this report arms higher education marketers with the insights and data to better understand students and their attitudes to online, distance learning and blended programmes. This report focuses on who the target audience is, how we can best reach them and people's perceptions of online learning to provide the sector with a strategy for how, when and where to communicate with this audience.

Online learning has seen a decrease of 0.5% in England, however OBHE (The Observatory on Borderless Higher Education)* still expects overall online education to increase as more students continue to seek an overseas education. Taking this into account, along with the limitations of student visas for international students in the UK and the EU Referendum, it's possible that online provision is going to become even more important to the UK education sector.

The Online Study Survey has shown that there are some misconceptions around what an online postgraduate is (concerning delivery, value and quality) and what prospective students think studying online entails. The survey found that the majority have low expectations of studying online, but those who are actually studying online report mostly positive experiences. It is, therefore, an opportunity for the sector to educate potential online learners as to what 'online learning' will actually mean for them.





Respondents felt that online learning was not as 'prestigious' or 'respected' as the same course taught through a face-to-face format. Perceptions around this are common but can be addressed through the use of a comprehensive content strategy that celebrates success, opportunity and quality - which can be amplified by a full-funnel creative advertising strategy.

Armed with the findings within this report, marketers looking to create a solid recruitment strategy to promote their online provision should focus on perception and expectation versus reality. It's clear that there is a gap between the perceptions of studying online and what it really entails, in which case it would be of benefit for higher education marketers to work towards closing this gap and reducing the number of perceived barriers. Students want to know what they are getting for their money, the skills they need to study online, the structure of the courses and how they will be assessed. Set realistic expectations and ensure your messaging is clear - providing prospective students with all the information they will need to make informed decisions.

**OBHE (The Observatory on Borderless Higher Education) <http://monitor.icef.com/2018/09/study-explores-adoption-of-online-learning-and-its-relationship-to-student-mobility/>*



ABOUT US

Natives Global Consultancy and our expert practitioners blend technology and expertise to help education institutions make better decisions through understanding their data. Trusted globally by over 250 institutions, Natives GC helps them understand and solve unique challenges.

We are the leading audience insights and conversion strategy consultancy. We specialise in student and global recruitment and marketing for the education sector. We help you understand your data and make better decisions.

Natives Group is a collection of specialist brands who can either solve individual problems or work collectively as partners to their clients.



www.nativesgc.com
[@NativesGC](https://twitter.com/NativesGC) // hello@nativesgc.com

NATIVES GLOBAL CONSULTING

We belong to

NATIVES.GROUP

