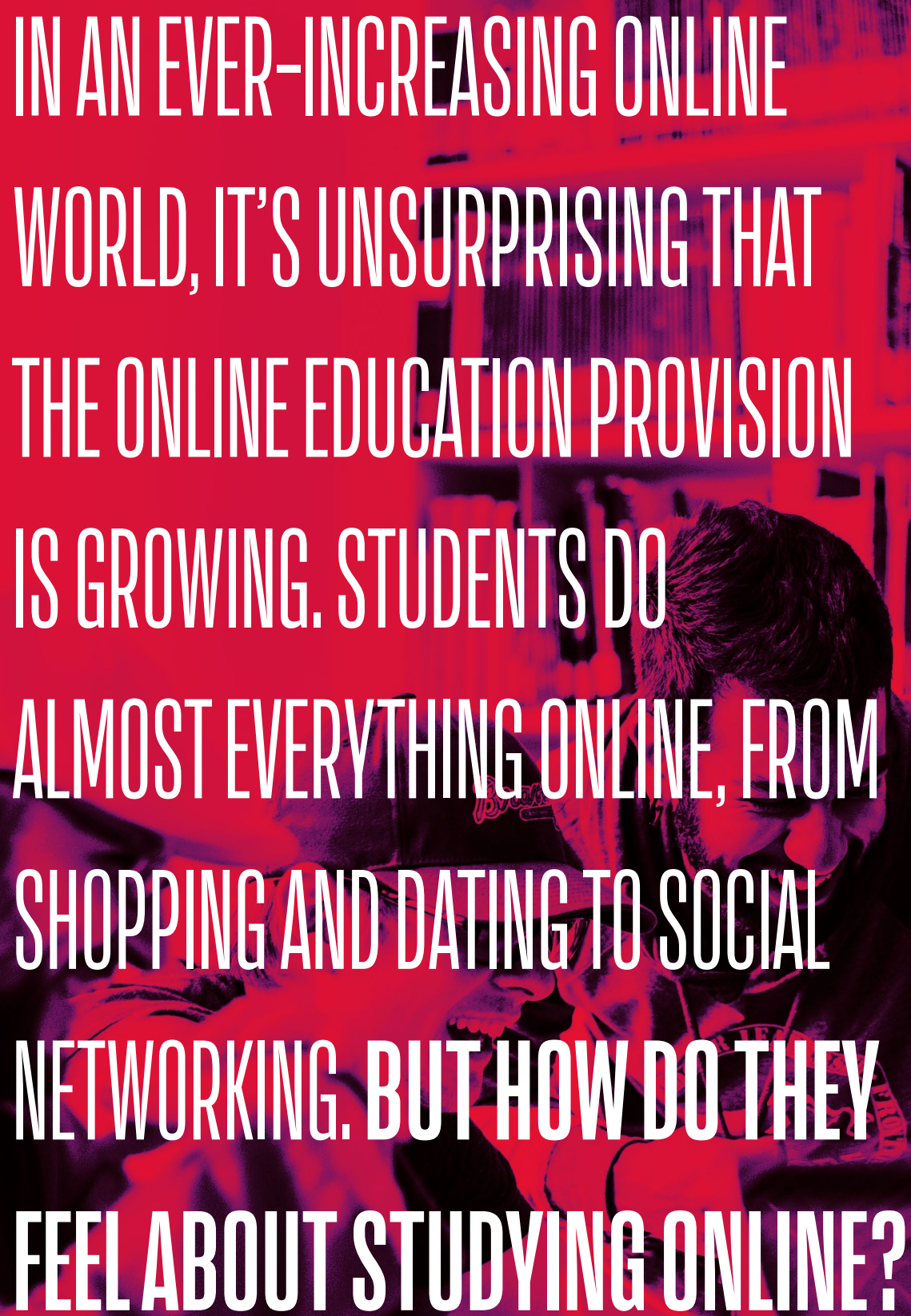


# ONLINE STUDY SURVEY

**NATIVES**





**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?**



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# About the Online Study Survey

**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?**

The Online Study Survey was launched in 2018 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, we analysed over 250,000 different data points and conducted 2,164 deep-dive interviews with students from across 119 UK institutions to get a truly national picture.

Throughout this report, preconceived ideas about prospective online learners are challenged by the findings. Do you know how 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 daily? All this, and more, is uncovered.

# About the Online Study Survey

## **WHY IS IT SO HARD TO JUDGE THE LANDSCAPE?**

As of November 2018, 66,000 international students were studying a postgraduate degree through either distance or online learning at a UK institution\*, a 2% increase year on year. Although this is growing internationally, it is difficult to understand the uptake of online learning from the UK market due to limited information collected and shared.

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.

## **WHO IS THE ONLINE STUDY SURVEY FOR?**

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.

\*HESA 2016/17 Aggregate Offshore Records



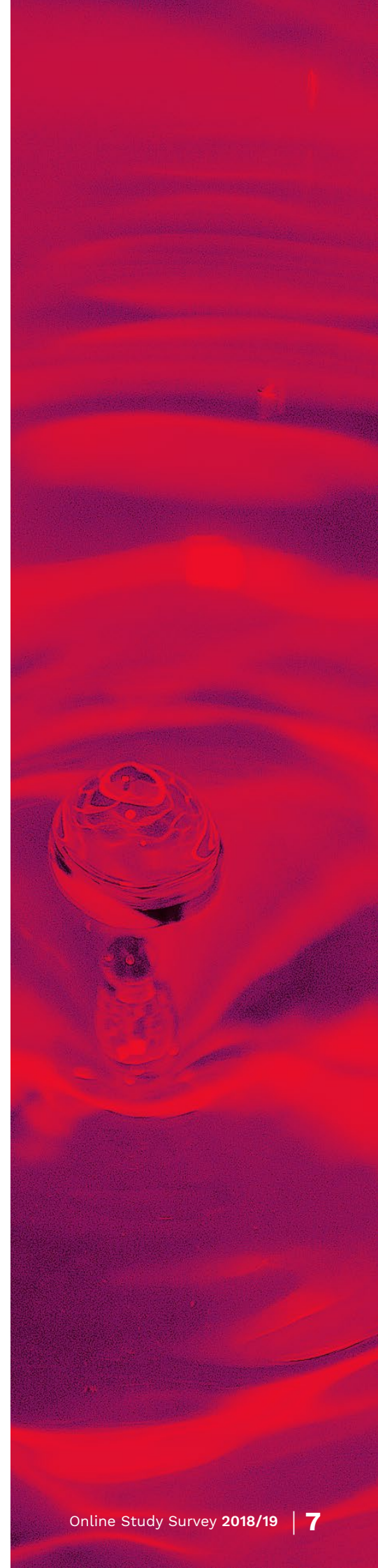
# Methodology

**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 by the Research Division at Natives, along with a panel of students from the Student Hut Opinion Panel. In total, the Research team analysed over 250,000 different data points and conducted 2,164 deep-dive interviews with students from across 119 UK institutions.

The survey was open for 10 weeks.

Equal weighting was given to each participant's response.





# SECTION 01:

**Demographics  
and personas**



# SECTION 01: Demographics and personas

## WHO IS IN OUR SAMPLE?

**Respondents from the Online Study Survey were all categorised into five 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. When comparing current postgraduate students and online postgraduate alumni we can see how the audience is changing over time and what creative and messaging will resonate.



## CURRENT POSTGRADUATE ONLINE LEARNER

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

## OPEN TO POSTGRADUATE STUDY ONLINE

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

## CURRENT POSTGRADUATE LEARNER

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

## OPEN TO TRADITIONAL POSTGRADUATE LEARNING

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

## NOT INTERESTED IN POSTGRADUATE STUDY

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



# CURRENT POSTGRADUATE ONLINE LEARNER



MOSTLY IN INTERMEDIATE OR MIDDLE MANAGEMENT

AVERAGE AGE  
**34**  
AVERAGE AGE

## GENDER:

**56%** **44%**  
FEMALE MALE

## SINGLE:

**59%**

## INTERESTS:



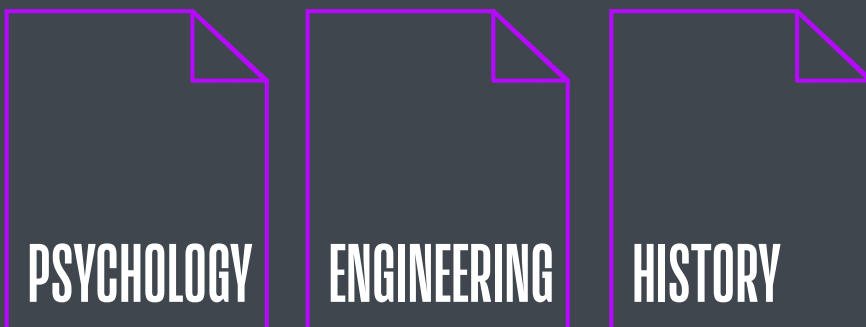
## SOCIAL MEDIA:



**BBC**

**The Guardian**

## MOST LIKELY TO HAVE STUDIED:



## DAILY COMMS:



**OPEN TO POSTGRADUATE  
ONLINE STUDY**



**MOSTLY IN  
FULL-TIME STUDY** 66%

**AVERAGE AGE**  
21  
**AVERAGE AGE**

**GENDER:**

**77%** **23%**  
**FEMALE** **MALE**

**SINGLE:**

**88%**

**INTERESTS:**



**SOCIAL MEDIA:**



**BBC**  
**The Guardian**

**MOST LIKELY TO HAVE STUDIED:**



**DAILY COMMS:**





# CURRENT POSTGRADUATE LEARNER

MOSTLY IN FULL-TIME STUDY **50%**

AVERAGE AGE  
**27**  
AVERAGE AGE

## GENDER:

**72%** **28%**  
FEMALE MALE

## SINGLE:

**74%**

## INTERESTS:



## SOCIAL MEDIA:



**BBC**  
**The Guardian**

## MOST LIKELY TO HAVE STUDIED:



## DAILY COMMS:



**OPEN TO TRADITIONAL  
POSTGRADUATE LEARNING**

**MOSTLY IN  
FULL-TIME STUDY** 60%

**AVERAGE AGE**  
21  
**AVERAGE AGE**

**GENDER:**

**67% FEMALE**   **33% MALE**

**SINGLE:**

**84%**

**INTERESTS:**



**SOCIAL MEDIA:**



**BBC**  
**The Guardian**

**MOST LIKELY TO HAVE STUDIED:**



**DAILY COMMS:**





**NOT INTERESTED IN  
POSTGRADUATE STUDY**

**MOSTLY IN  
FULL-TIME STUDY** 50%

**AVERAGE AGE**  
21  
**AVERAGE AGE**

**GENDER:**

70% 30%  
**FEMALE MALE**

**SINGLE:**

91%

**INTERESTS:**



**SOCIAL MEDIA:**



**B B C**

**Daily Mail**

**MOST LIKELY TO HAVE STUDIED:**

**BUSINESS**

**MEDICINE**

**ENGINEERING**

**DAILY COMMS:**



# SECTION 02:

## Key findings



### 1. People expect online postgraduate courses to be cheaper

A massive 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.

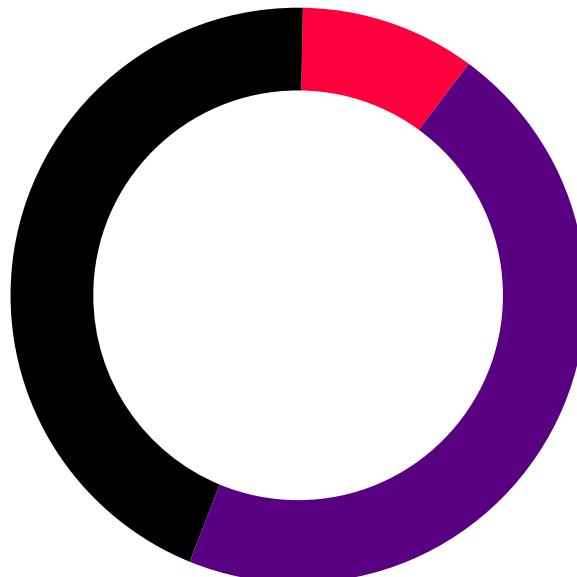
**How would you expect the cost of an online postgraduate course to compare to a traditional (face-to-face) postgraduate course?**

- More expensive
- The same
- Less expensive



**How does this number of hours per week compare to what you would expect from a traditional (face-to-face) postgraduate course?**

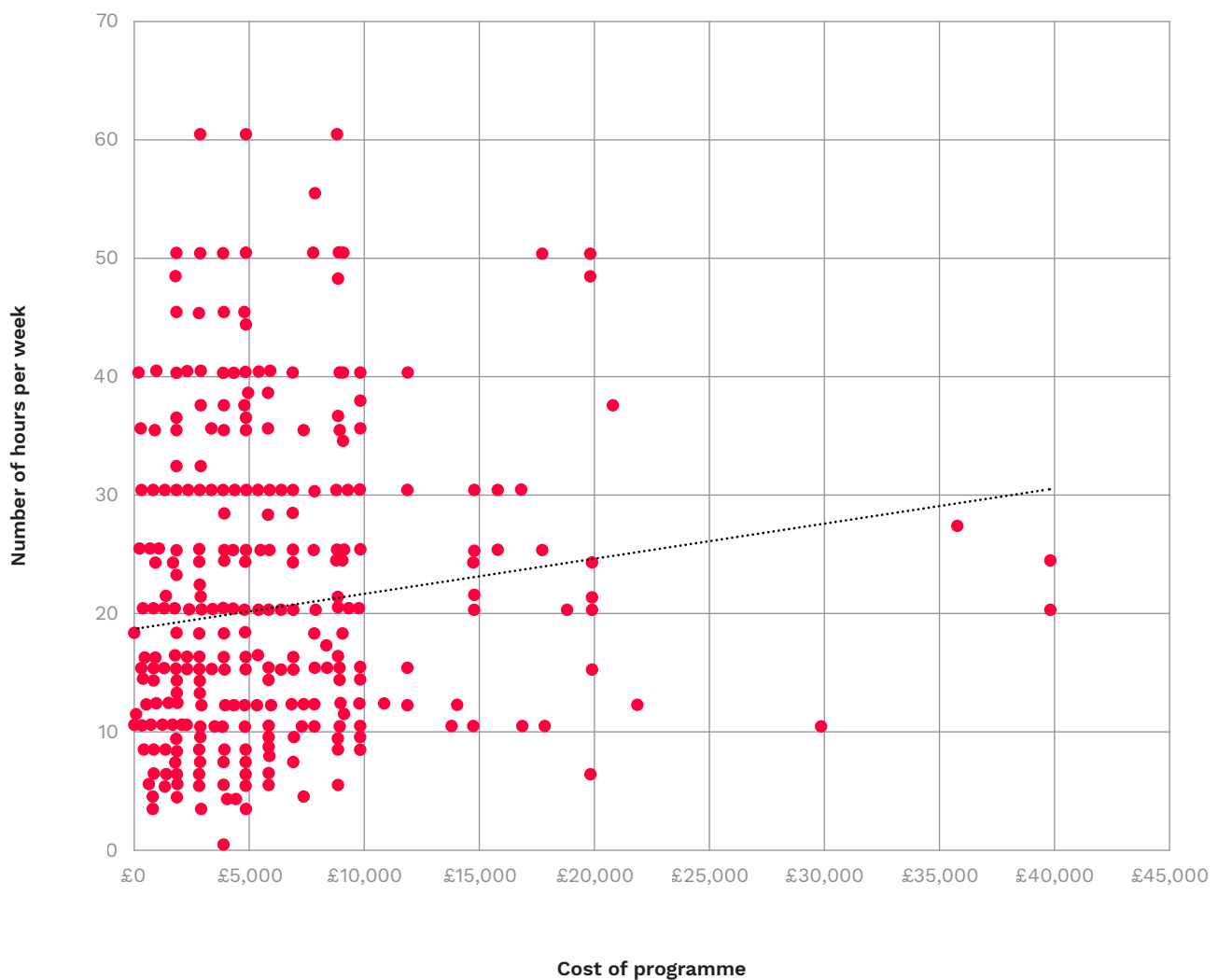
- More than traditional
- Same as traditional
- Less than traditional





## 1. People expect online postgraduate courses to be cheaper

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.

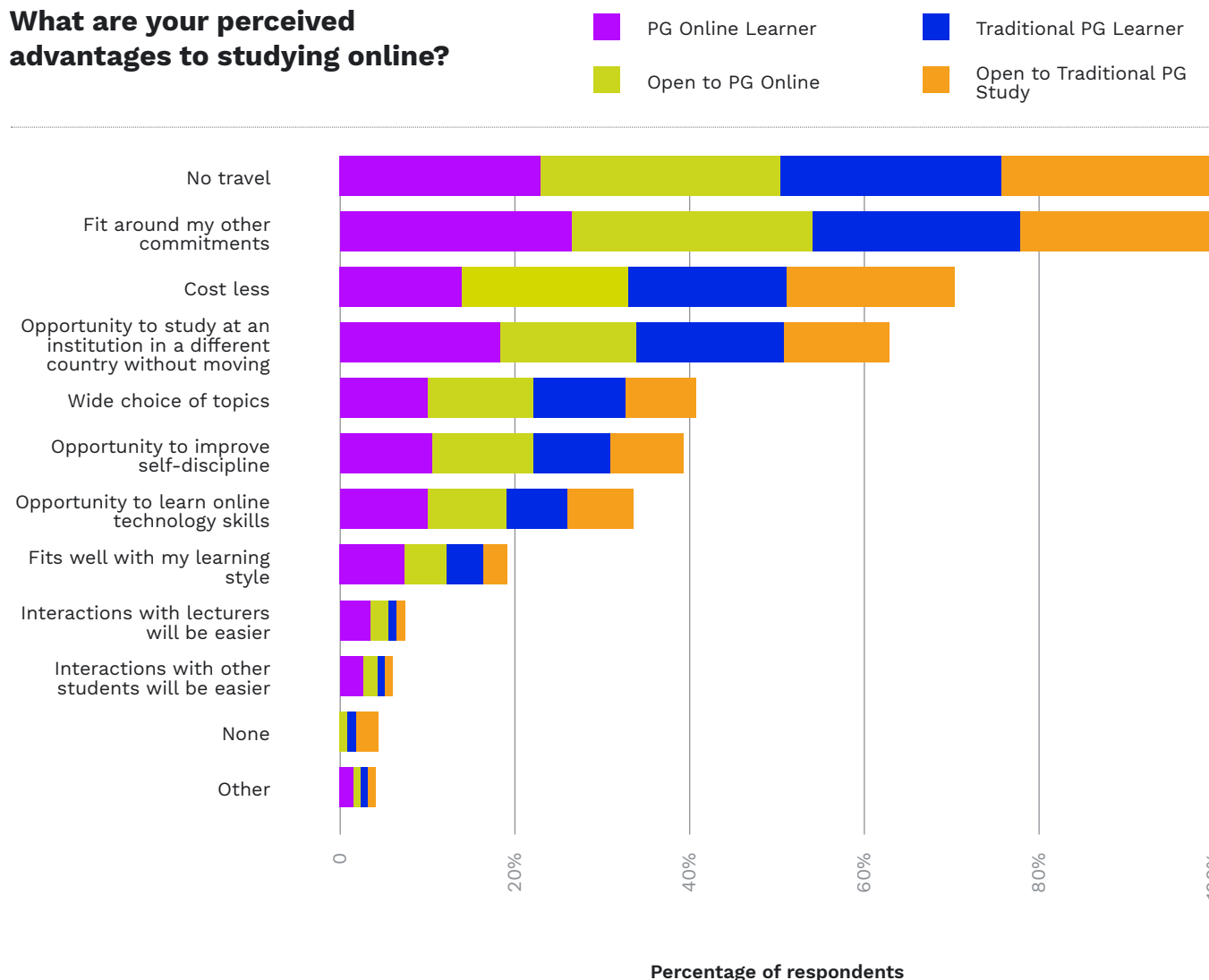


## 2. Flexibility is a key perceived difference between online and traditional postgraduate learning

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'.

### What are your perceived advantages to studying online?



### **2. Flexibility is a key perceived difference between online and traditional postgraduate learning**

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

**“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 flexibly around my children and still better myself.”**

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.

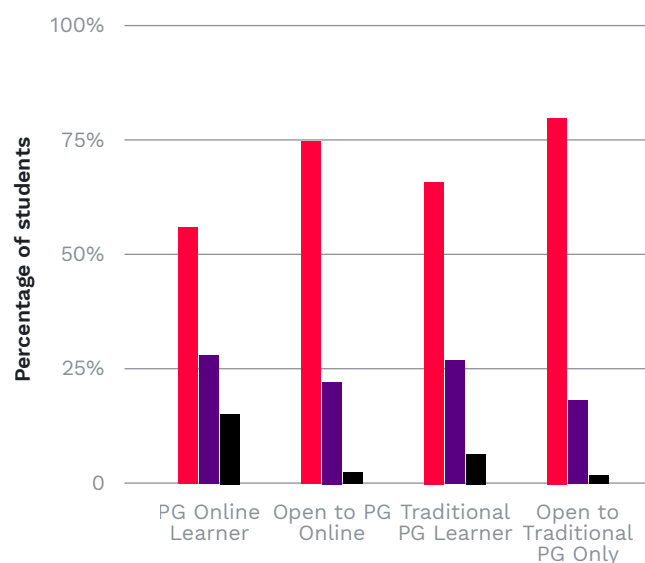
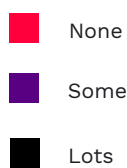


### 3. Openness to online learning doesn't necessarily mean students have had previous experience of online learning

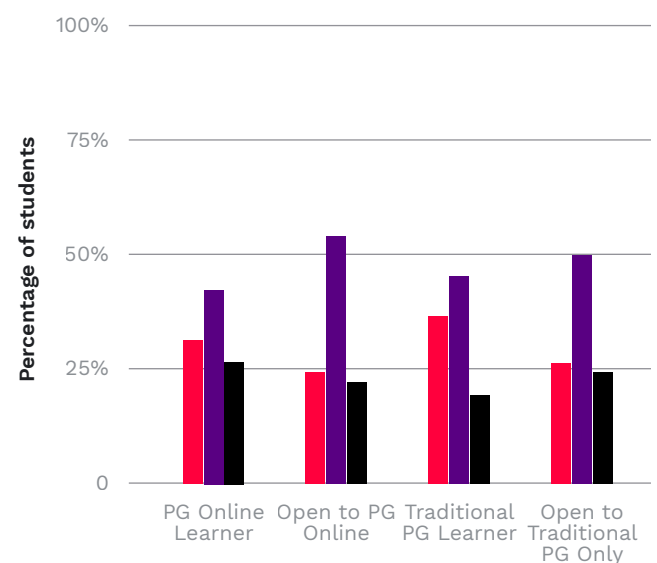
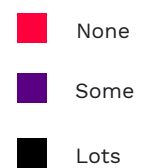
Most respondents from the survey had no experience with MOOCs (Massive Open Online Courses). For those currently studying online, we saw that a higher percentage of this group had 'lots' of experience with MOOCs compared to other groups (15% vs 3%). Still, only 2% of the 'open to PG online group' reported '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 an openness to online learning.

#### MOOCs



#### YouTube Tutorials



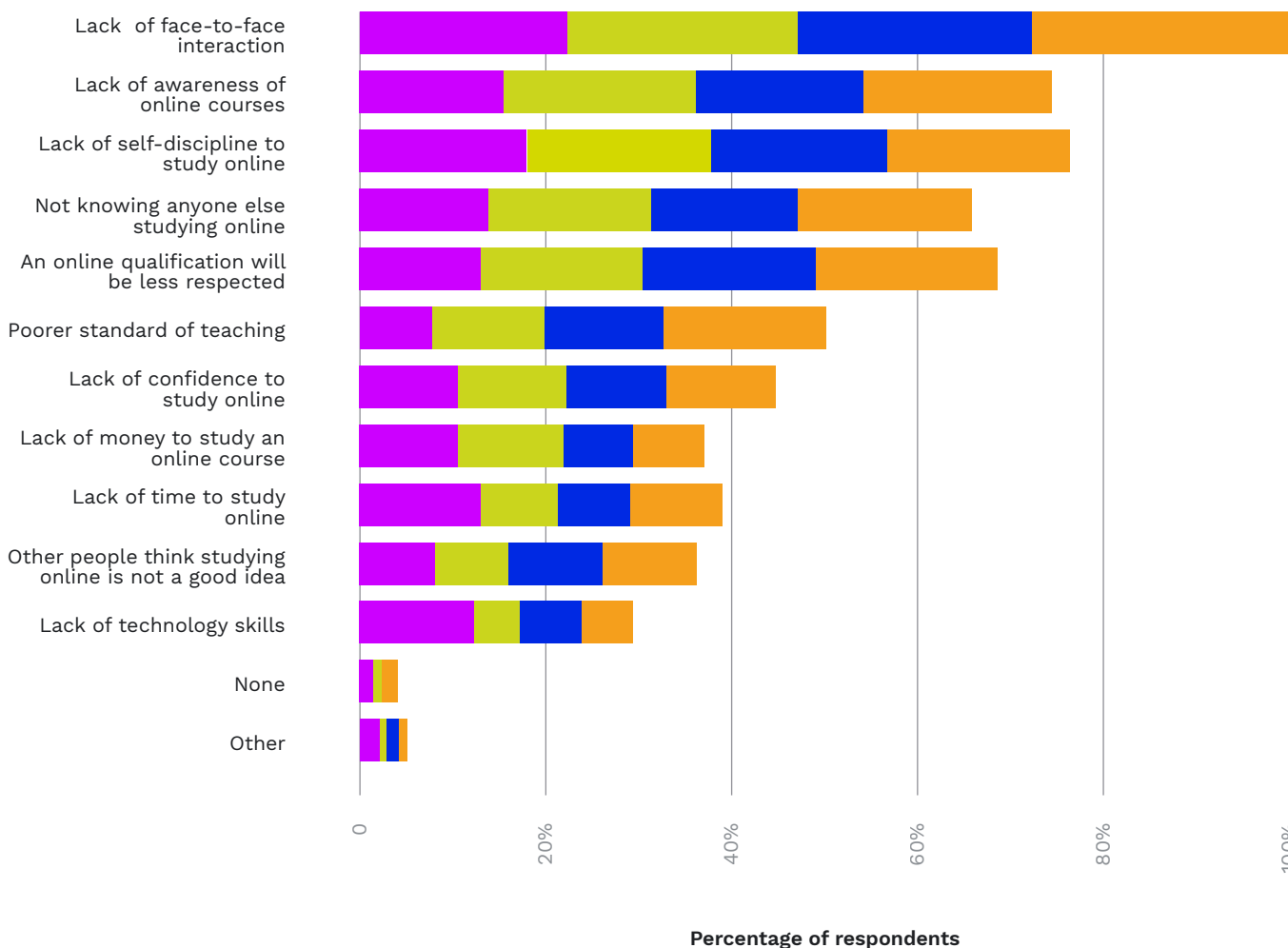
## Recommendations

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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 include lack of face-to-face interaction, lack of awareness, lack of respect and poorer standards of teaching

**What are your perceived disadvantages to studying online?**



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%).



### 4. Perceived barriers to online learning include lack of face-to-face interaction, lack of awareness, lack of respect and poorer standards of teaching

Findings from the qualitative data suggest that respondents thought that the primary impact of online learning would be centred around less motivation, loneliness and isolation, and the inability to have discussions and ask questions. Also, '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 which 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.

## Recommendations

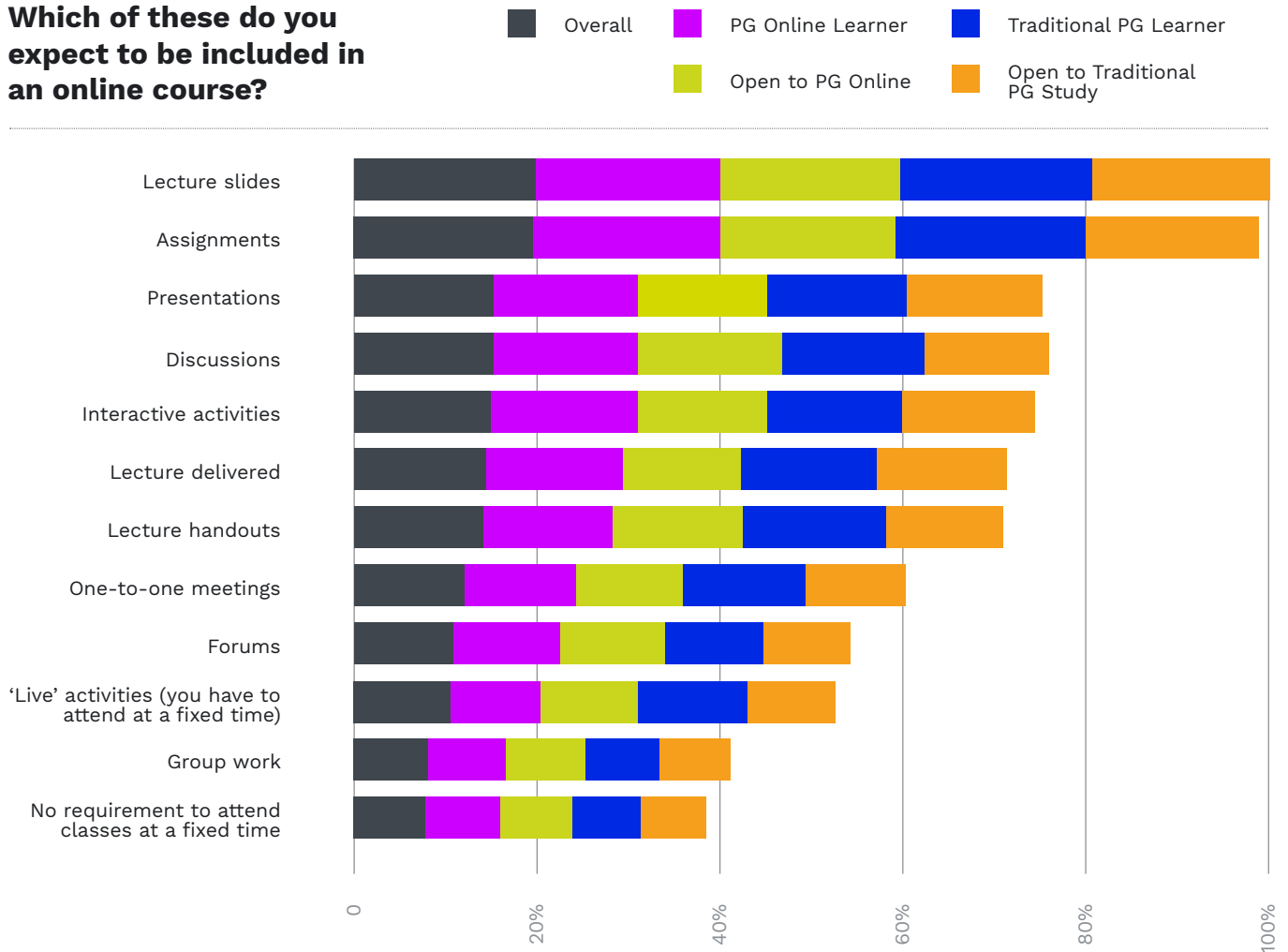
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Find ways to promote interaction and ensure online meetings where students can see each other to limit the impact of a perceived lack of face-to-face interaction. Create content hubs and support around tips for improving self-motivation and time-management 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, while 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

**Which of these do you expect to be included in an online course?**



Percentage of respondents

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%).



## Recommendations

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Set realistic expectations about online learning and what that means for the courses you're offering. There's a definite barrier with expectation vs reality when it comes to online learning, so it's vital that HEIs combat any myths about online learning with clear and informative messaging.



### 6. Prospective learners use a vast variety of media on a daily basis

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

This is in somewhat of a contrast to current online learners, who while 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.



# PUBLISHERS

Daily Mail

theguardian

CNN

London  
Evening  
Standard

FT  
FINANCIAL  
TIMES

BBC

# PUBLISHERS

theguardian

COSMOPOLITAN

sky NEWS

Daily Mail

BBC

# PUBLISHERS

BuzzFeed VOGUE

theguardian

BBC

# PUBLISHERS

The  INDEPENDENT

The Telegraph BuzzFeed

theguardian

The  
Economist

BBC

# CURRENT POSTGRADUATE ONLINE LEARNER



DAILY

WEEKLY

YOUTUBE

47%

30%

FACEBOOK

56%

13%

INSTAGRAM

30%

9%

LINKEDIN

17%

24%

TWITTER

24%

11%

SNAPCHAT

15%

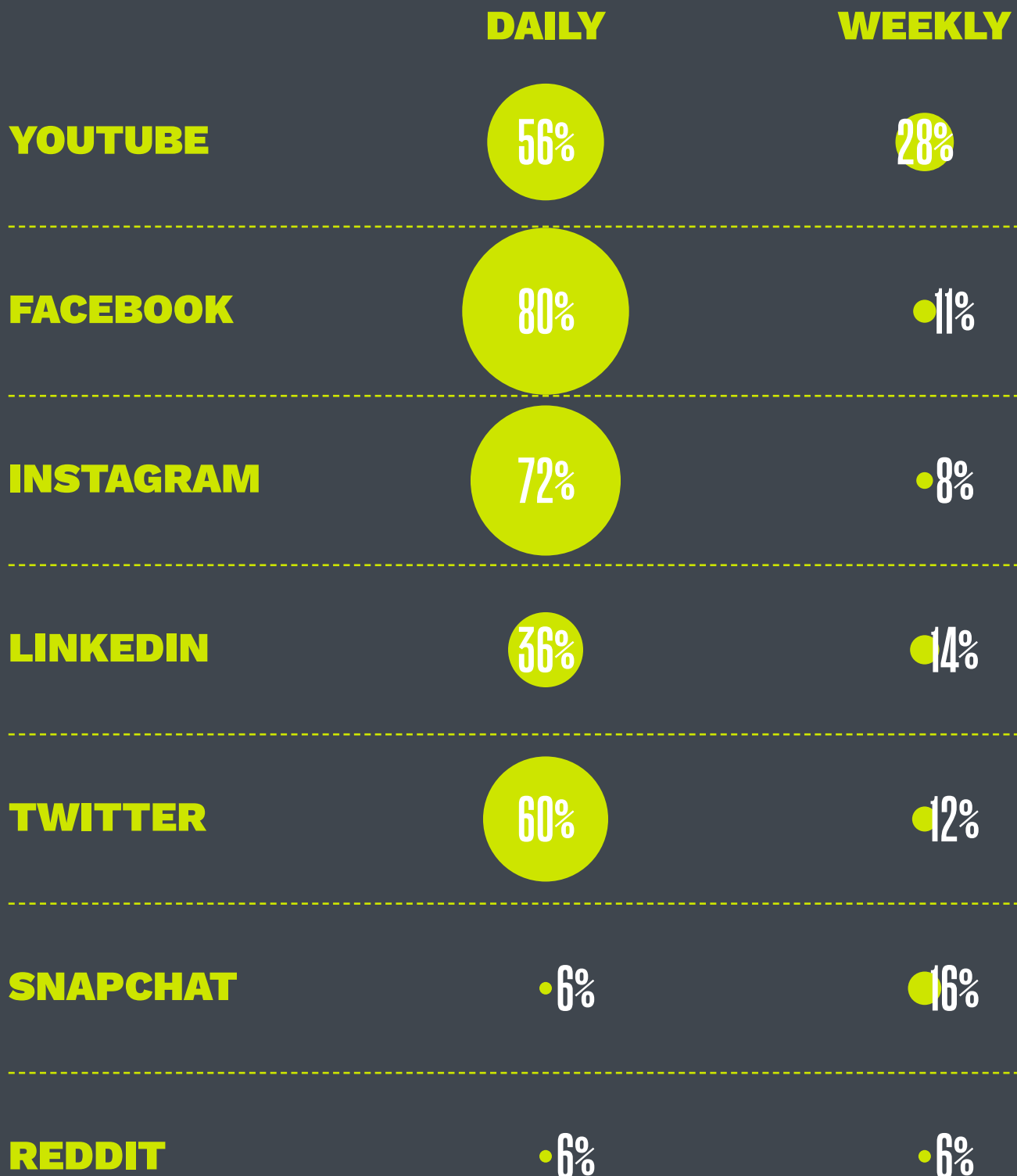
9%

REDDIT

1%

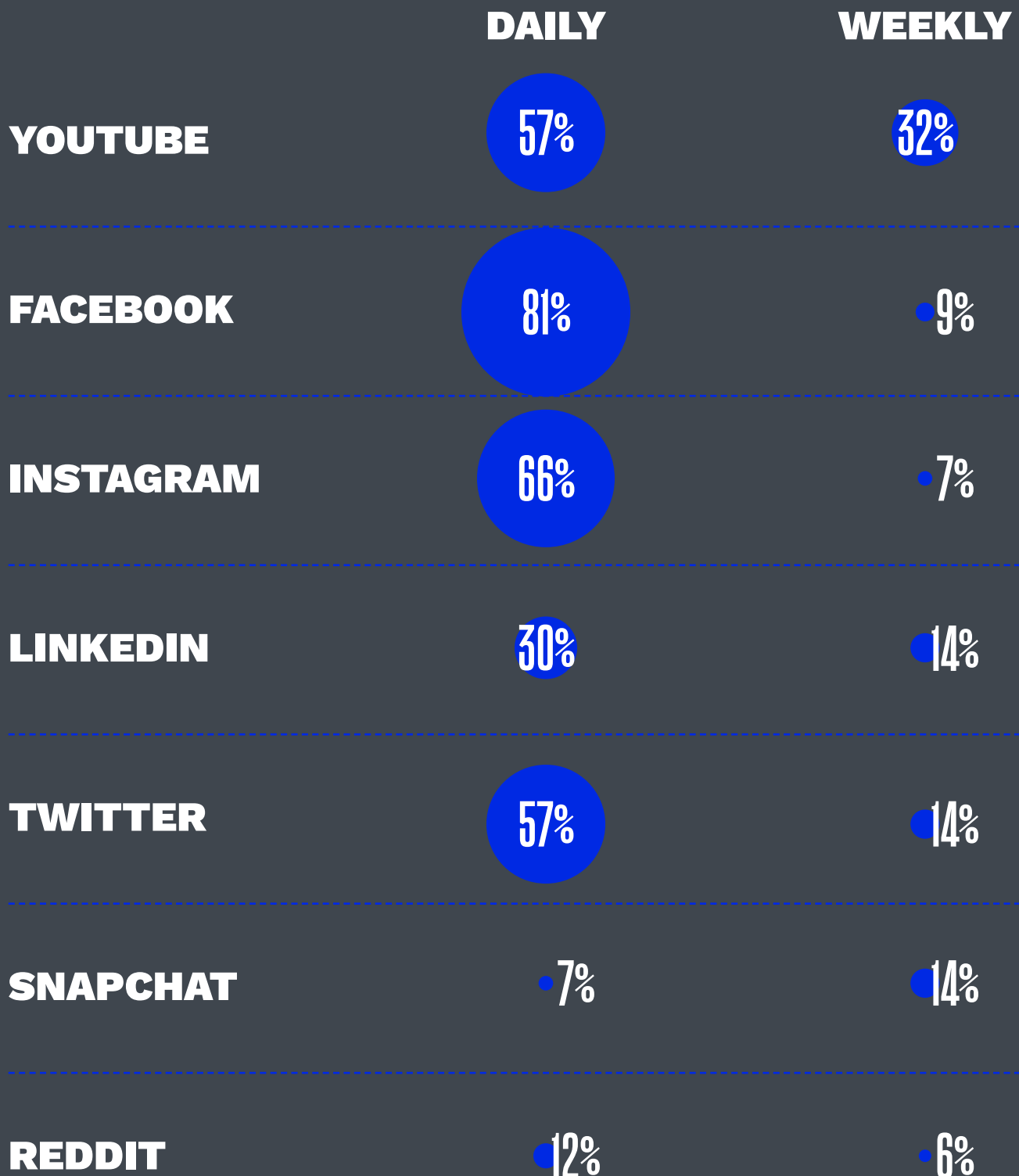
2%

# OPEN TO POSTGRADUATE ONLINE STUDY

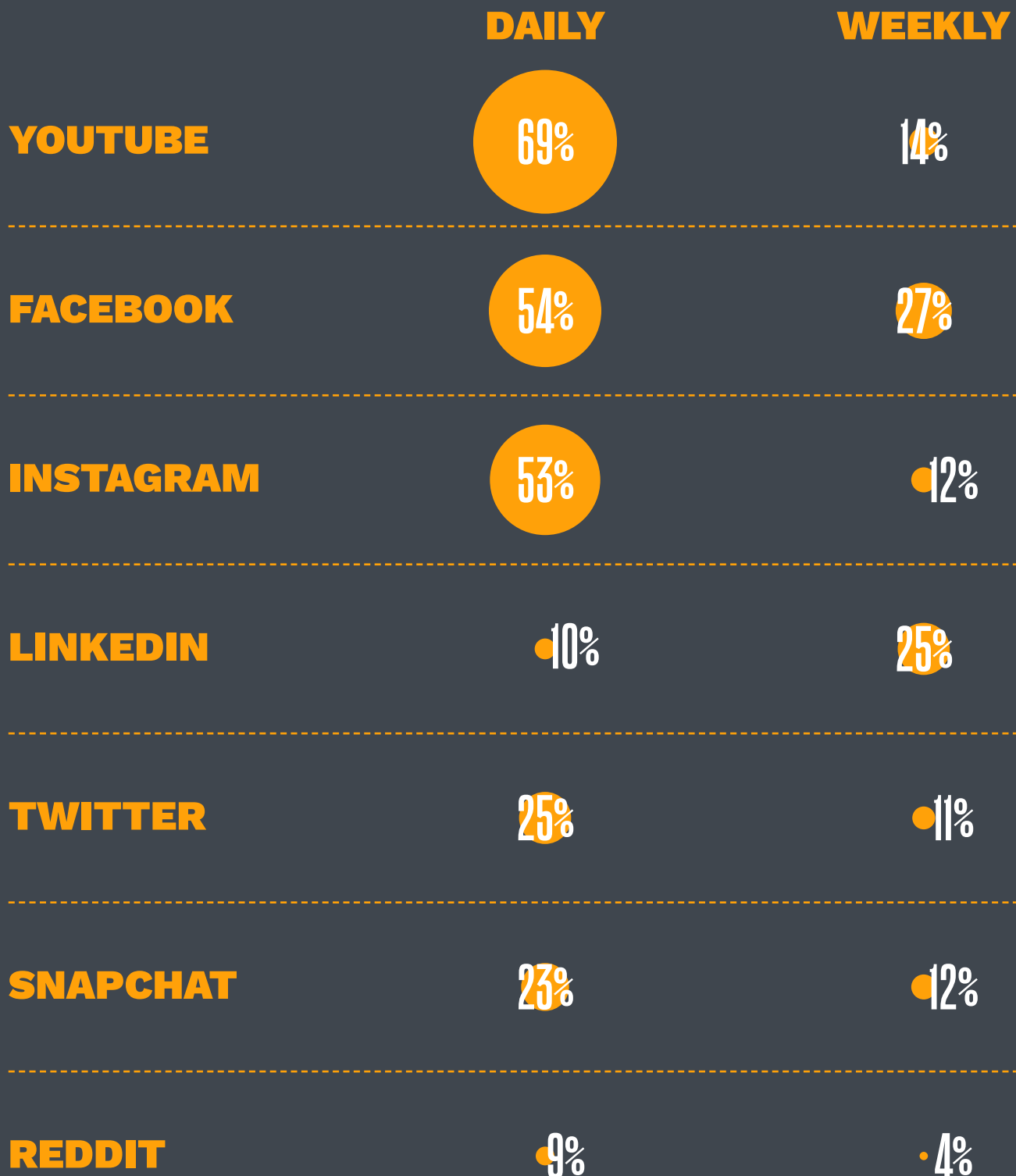




# OPEN TO TRADITIONAL POSTGRADUATE STUDY



# CURRENT TRADITIONAL POSTGRADUATE LEARNERS



## Recommendations

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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.

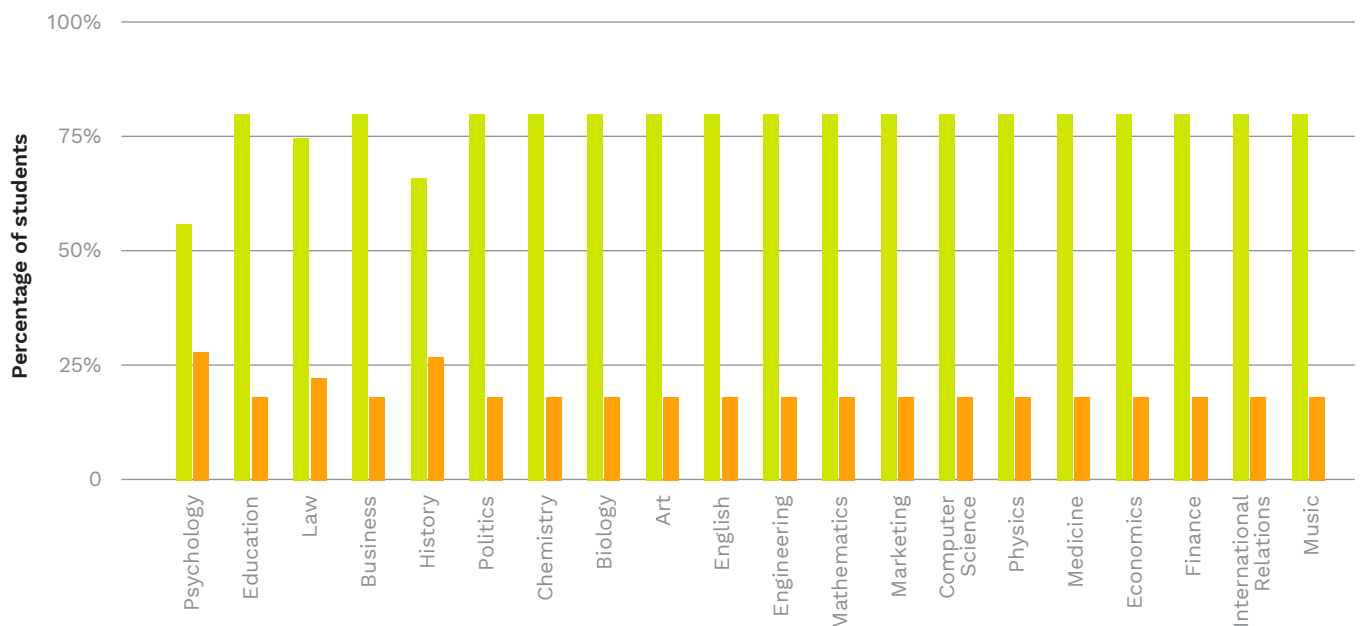
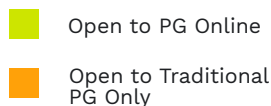
## 7. Your online portfolio matters to prospective online learners

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.

### Top 20 Programmes of Interest





## **Recommendations**

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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 03:

## 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 learning, 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. 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

# Conclusion

assessed. Set realistic expectations and ensure your message is clear - providing prospective students with all the information they will need to make informed decisions.

While overall acceptances via the main scheme have plateaued, and there being fewer 18-year-olds nationally, there are opportunities for institutions to attract more direct applications and older students entering higher education. Don't miss the chance to grow and focus on a long-term content-led strategy targeted at direct applicants. Using the insights contained here, and armed with the knowledge of which platforms and devices they are using and when, you have the opportunity to address the unique concerns, barriers and influencing factors of this group.

As is the long-term trend, Clearing is starting even earlier for students. They are researching sooner and taking affirmative actions earlier in the process. The good news - early planning is where the greatest value can be found for institutions to grow. Early brand-building campaigns will give you the edge, allowing you to collect more data to use later in the season and help move your prospective students down the funnel.

While we have presented the national findings, note that when we drill down to specific institutions, we did find quite varied results. This highlights the importance of understanding your own Clearing students and benchmarking them against the national findings. Each of our partnering institutions will have received their own data with which to do so. Partnering with the National Clearing Survey is free and open to all HEIs who have open vacancies during Clearing 2020.

These findings offer a fascinating insight into the rapidly evolving behaviours of Clearing students and how they consume media. Students are using the Clearing process to their advantage and higher education institutions need to adapt their strategies each year if they are to attract students and maximise conversions during this period.

To reflect the changing attitudes, methods, and technology adoption, the National Clearing Survey will be updated and repeated in 2020.

\*\*OBHE (The Observatory on Borderless Higher Education)



# About Natives

**We're Natives. The student specialist marketing group.**

**Connected and curious.**

We **think student.** We do, we learn, we refine, and we apply what we've learnt, just like students (and let's face it, we could all be a bit more student).

**Impact** is something to aspire to - looking beyond impressions, reach, clicks, conversions and inspiring a focus on the bigger picture. More students enquiring, applying, and enrolling. We can help you understand your brand, your audience, their needs and behaviours with unrivalled insights and data.

We can help you reach students in the right place, on the platforms they're using. Attracting students at the right time, and making a meaningful personalised connection that builds trust and loyalty.

**Sound good?**

**Let's work together**



## Take part in our next research project, the National Clearing Survey

To reflect the changing attitudes, methods and technology, the National Clearing Survey will be updated later this year. The Research Division at Natives are registering institutions who wish to take part and collaborate in the National Clearing Survey 2020/21. There are a number of benefits to your institution if you choose to participate:

- You'll receive a survey to share with your 2020 Clearing students
- You'll be the first to receive a copy of the full report before non-participating institutions
- You can access your institution's raw data which will allow you to benchmark the actions of your students with the national findings
- Your students who take part will automatically be entered into a prize draw to win a high-value prize to help with their ongoing studies
- You get to make the life of a Clearing student easier

Register to take part in the National Clearing Survey.  
[www.nationalclearingsurvey.com/take-part](http://www.nationalclearingsurvey.com/take-part)

