OES / ENROLLMENT / BRANDING

Understanding *Today's* Online Learners

Carnegie Research Insights

The
Carnegie
Conference

Today's Presenters

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Today's Agenda

Why Online, Why Now?

About the Research

Motivations & Online Programming

Student Needs and AI Support

Online Learning and Brand

Carnegie's Online Learner Profiles

Big Thunder Mountain Railroad	Career Builder (Non-degree)
Dumbo the Flying Elephant	Career Builder (2-year Degree)
Jungle Cruise	Career Builder (4-year Degree)
"it's a small world"	Career Builder (Graduate Degree)
Mad Tea Party	Adult Learner (Non-degree)
Peter Pan's Flight	Adult Learner (2-year Degree)
Pirates of the Caribbean	Adult Learner (4-year Degree)
Prince Charming Regal Carousel	Adult Learner (Graduate Degree)
Space Mountain	Degree Completer
The Haunted Mansion	Traditional Students (2-year Degree)
Tomorrowland Transit Authority PeopleMover	Traditional Students (4-year Degree)

About the *Research*

Carnegie completed online learning research in late 2025.

Full thematic report with insights and recommendations is available for all conference attendees.

Reporting includes quantitative outcomes, qualitative themes and quotes, as well as extensive data tables.

Learner data is broken down across 43 demographic categories; leader data across 11 categories.

Includes 11 key audience profiles for targeted marketing or program adjustments.

2 Online Surveys

One of prospective and current online learners in the United States; the other with leaders in higher education.

10K+ Voices

A nationwide panel sample with diverse backgrounds and demographics.

140

Online leaders also surveyed.

45%

Of online learners and prospects said they would only consider online learning.

77%

Of online learners and prospects wanted to earn a full degree.

Motivations and Online Programming

Motivations

Which of these motivations for continuing your education is most true for you?

+

+

+

+

Enhance my career skills.

Career Builders (2-year)
Career Builders (Graduate)
Degree Completers

Study a personal passion of mine.

Adult Learners (Non-degree)
Adult Learners (Graduate)
Traditional Students (2-year)
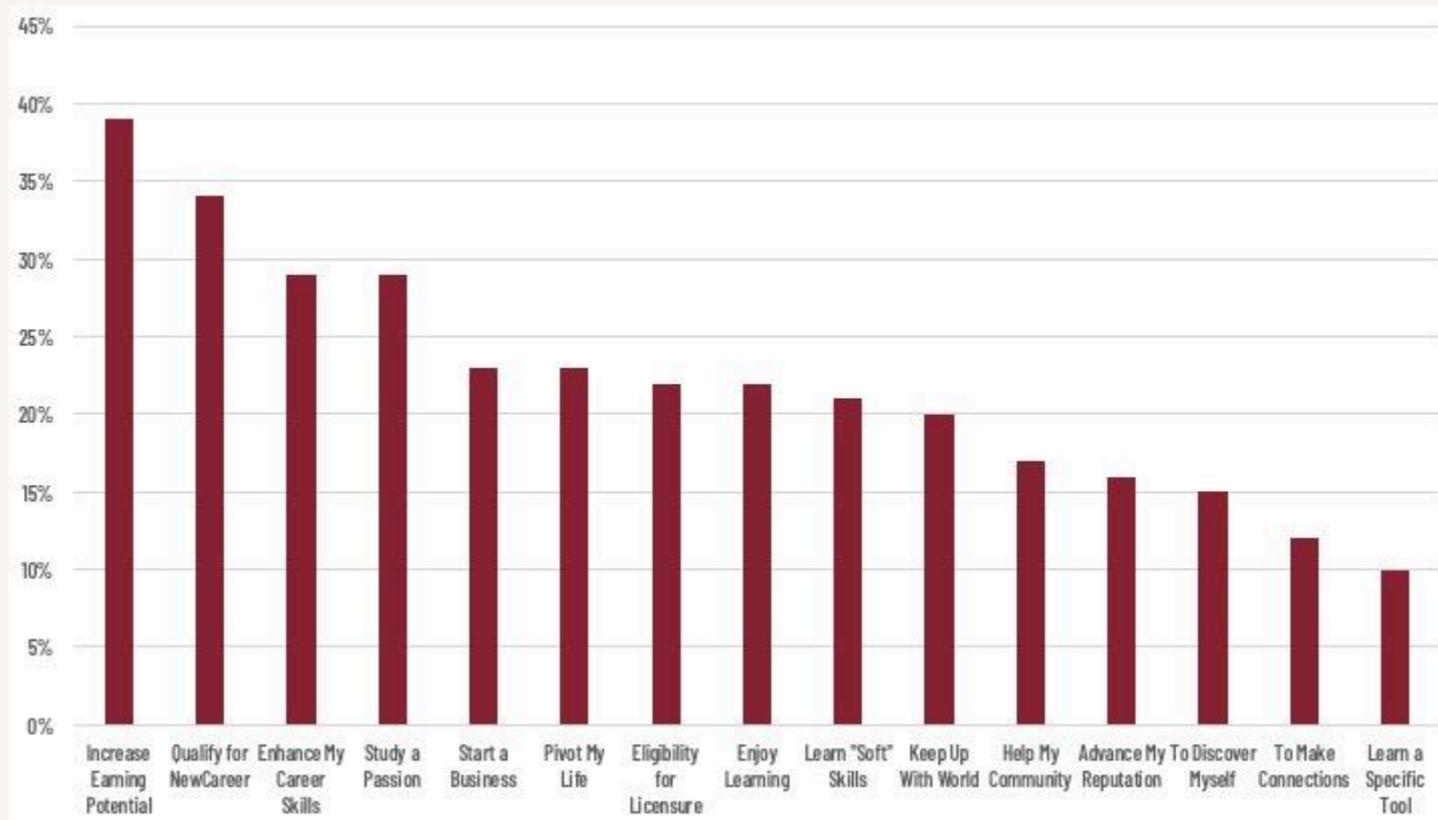Traditional Students (4-year)

Increase my earning potential.

Top Choice Overall Sample
Career Builders (Non-degree)
Career Builders (4-year)

Qualify for a new career.

Adult Learners (2-year)
Adult Learners (4-year)

# Which of these motivations for continuing your education is most true for you? (Select up to 4.)

"A big part of why I want to go back to school is to meet people outside my industry but facing similar challenges because they might have unique solutions."

Career Builder (4-year) who picked "Make Connections."

Don't discount factors that were picked less often in the data; use it to personalize!

What are the greatest barriers to you continuing your education? (Select up to 4.)
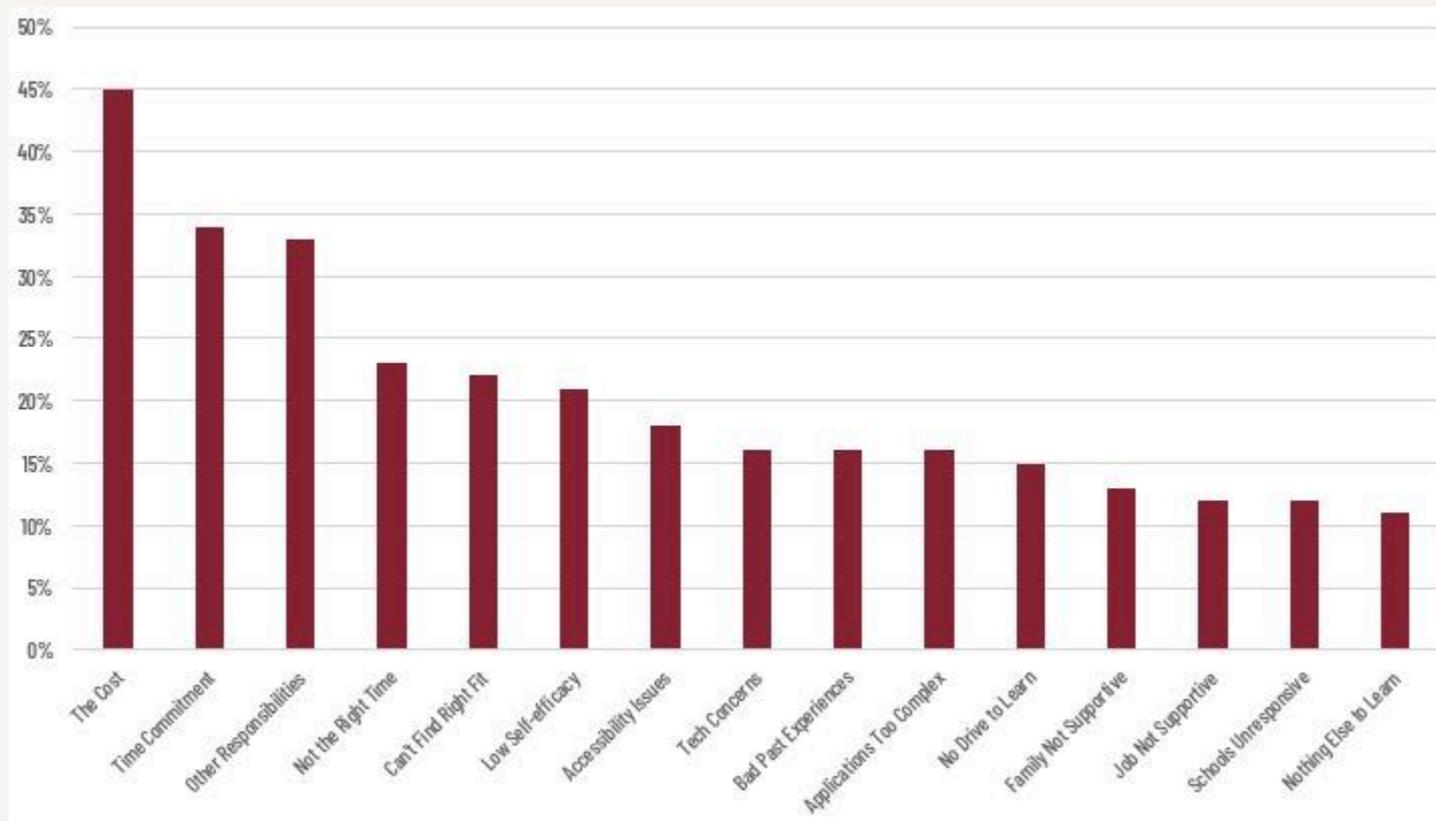
"I have a hard time imagining what it would look like to take college classes online. It sounds so difficult."

Adult Learner (2-year) who picked "Low Self-efficacy."

A lack of scripting is the biggest psychological barrier to any action.

Like with motivations and barriers, selections for how to pick a program were highly dependent on *audience factors* and *demographics*.

This is the importance of personalization.

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Programming Dichotomies.

By using a 6-point "no fence-sitting" scale on some program factors, Carnegie can see preferences across online learners and for specific audiences.

Time to Degree

Learning Synchronicity

Instructor Type Preference

Strongly Speed to Degree	Somewhat Speed to Degree	Slightly Speed to Degree	Slightly Lighter Schedule	Somewhat Lighter Schedule	Strongly Lighter Schedule
42%	25%	15%	10%	5%	4%

Strongly Asynch.	Somewhat Asynch.	Slightly Asynch.	Slightly Synch.	Somewhat Synch.	Strongly Synch.
30%	28%	21%	12%	5%	4%

Strongly Traditional Educators	Somewhat Traditional Educators	Slightly Traditional Educators	Slightly Industry Leaders	Somewhat Industry Leaders	Strongly Industry Leaders
34%	25%	19%	12%	6%	4%

"Keeping up with online student changes has been difficult. They all want *different things*, but we've treated them as a *single group* for so long."

Online leader at a large, public institution.

90% of leaders believe their online audience changed in the past 5 years.

Student Needs *and* AI Support

Rating Support Services

Rate how *important* these student services would be for *you* if you were completing an online education.

\+   \+   \+   \+

Academic planning.	Technical support.	Library and research support.	Career planning or job search.
Adult Learners (2-year)	**Top Choice Overall Sample**	Career Builders (4-year)	Career Builders (2-year)
Adult Learners (4-year)	Career Builders (Non-degree)	Career Builders (Grad)	Traditional Students (2-year)
	Adult Learners (Non-degree)	Adult Learners (Grad)	Traditional Students (4-year)
	Degree Completers		

Leaders Align on *Support* and Access

Many institutions are already offering robust support services for online students, and some offer access to in-person amenities as well.

Two-thirds of leaders surveyed said their school offers some exclusive support services.

Almost all the rest said the online students simply have the same support services as in-person students.

Online students have the opportunity to use on-campus amenities at 4-in-5 surveyed schools.

However, less than 1 in 10 is heavily encouraged to use these facilities or speaks about them heavily in marketing materials.

Online students are allowed to take an in-person class at 3-in-5 surveyed schools.

While this may be rare in actual use cases, it does relate to why some online learners prefer an institution near to them. Just having the option is appreciated.

AI *Opportunities* and *Concerns*

Student use of AI and interest in an online AI support tool shows a high likelihood of a need in this space.
But students and leaders have some concerns.

Students worry about disruption.

AI was the top trend to watch among leaders.

Leaders worry about falling behind.

Active AI Use

How actively do you use AI (artificial intelligence) tools in your daily life?

Audience	NOT AT ALL	TRIED OUT, NOT USING MUCH	USE EVERY ONCE IN A WHILE	USE THEM SOMETIMES	USE THEM OFTEN	AVERAGE SCORE*
All Respondents	13%	17%	22%	25%	23%	3.27

AI Support Tool Interest

Are you interested an AI support tool in your online program with the chance to elevate to a human?

AUDIENCE	HIGHLY DISINTERESTED	SOMEWHAT DISINTERESTED	SLIGHTLY DISINTERESTED	SLIGHTLY INTERESTED	SOMEWHAT INTERESTED	STRONGLY INTERESTED	AVERAGE SCORE*
All Respondents	8%	7%	11%	24%	20%	30%	4.30

Future AI Use

How likely are you to use AI for the following purposes?

Student Service	WOULD NOT CONSIDER	HIGHLY UNLIKELY	SLIGHTLY UNLIKELY	SLIGHTLY LIKELY	HIGHLY LIKELY	ALREADY DO	AVERAGE SCORE*
To Brainstorm Ideas	10%	7%	11%	25%	31%	16%	4.10
To Prep for an Interview	11%	7%	10%	26%	31%	15%	4.02
To Take Notes	12%	8%	12%	25%	28%	14%	3.92
To Assist With Communicating	13%	9%	12%	25%	27%	13%	3.83
To Help With Assignments	14%	9%	13%	27%	25%	13%	3.80
To Create Presentations	14%	9%	13%	25%	27%	12%	3.76
To Compare Education Programs	13%	10%	15%	26%	23%	12%	3.73
To Write Admissions Materials	17%	10%	14%	25%	25%	10%	3.59

"Budgets are cut a lot despite online being a *core focus*. AI is a possible way to solve some of the shortfall in staffing, but we aren't harnessing it well yet."
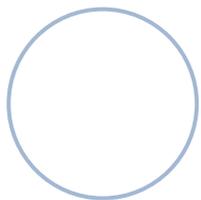
Online leader at a small, private institution.

Only a *quarter* of leaders felt staff/budgets for online are adequate.
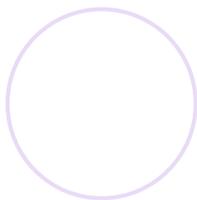
Online Learning *and* Brand

Student Personality

Which of these personality archetypes is most associated with each audience?

Confident, powerful, and assertive.

Career Builders (2-year)
Career Builders (4-year)

Supportive, caring, and selfless.

Adult Learners (Non-degree)
Adult Learners (2-year)
Adult Learners (Grad)

Entertaining, energetic, and dynamic.

Traditional Students(2-year)
Traditional Students (4-year)

Innovative, visionary, and forward-thinking.

Career Builders (Non-degree)
Career Builders (Grad)
Degree Completers

Creative, original, expressive, and unique.

Top Score Overall Sample
Adult Learners (4-year)

1-in-5

Prospects said institutional reputation was a top selection criteria factor for them.

35%

Of prospects are using general keyword search to look for programs.

30%

Of schools have a separate online marketing budget.

30%

Of prospects will study your website extensively when picking an online program.

95%

Of prospects said it is at least slightly important to pick a school with a recognizable brand for their online learning.

Don't Leave Your Brand *Behind*

Building a reputation in the online space is important. The top schools identified by prospects of being of interest were scored higher because of history in the space.

"There is something about having a degree from a certain place that has *power* in the room. You don't get that same impact without it."

Career Builder (4-year).

Online learners see brand as *vital* to the *value* of their degree.

Online Learner
Profiles

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Online Learners are not a *Monolith.*

Carnegie created 11 audience profiles for segmented online audience outreach.

Online Learner Profiles consist of audience targeting information, a learning profile, a communications and outreach primer, and key motivational and behavioral characteristics.
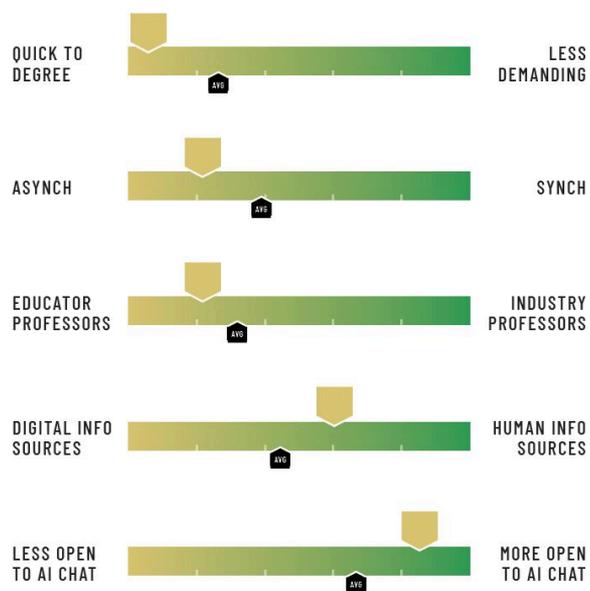
Consider which audiences are **most relevant** to your online programs and adjust strategies, brand building, and communications plans accordingly based on each profile.

Career Builder (4-year Degree) Learning Profile

Learning preferences and AI use for this segment.

PROGRAM INTEREST DICHOTOMIES

QUICK TO DEGREE — LESS DEMANDING

ASYNCH — SYNCH

EDUCATOR PROFESSORS — INDUSTRY PROFESSORS

DIGITAL INFO SOURCES — HUMAN INFO SOURCES

LESS OPEN TO AI CHAT — MORE OPEN TO AI CHAT

SUPPORT SERVICE NEEDS

INTEREST IN SUPPORT SERVICES

IMPORTANT SERVICES
ACCESS TO CAMPUS RESOURCES
COURSE TUTORING
LIBRARY SUPPORT
ALUMNI ENGAGEMENT

AI INTEREST PROFILE

CURRENT USE OF AI

TOP AI USE CASES
COMPARISON SHOP COLLEGES
HELP WITH ASSIGMENTS
COMMUNICATION ASSISTANCE
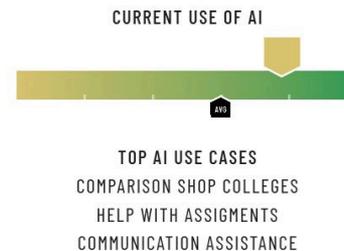
Career Builder (4-year Degree) Comms Profile

Outreach and communication details about this segment.

PROSPECTS IN THIS SEGMENT...

ARE **MORE** MOTIVATED BY
IMPROVING THEIR COMMUNITY
ADVANCING THEIR REPUTATION
DISCOVERING THEMSELVES
THE ENJOYMENT OF LEARNING

ARE **LESS** MOTIVATED BY
STARTING THEIR OWN BUSINESS
PIVOTING LIFE DIRECTION
LEARNING SPECIFIC JOB TOOLS
SITTING FOR LICENSURE

CARE **MORE** ABOUT A PROGRAM'S
BRAND REPUTATION
BUSINESS PARTNERSHIPS
INSTITUTIONAL REPUTATION
CREDIT TRANSFER

CARE **LESS** ABOUT A PROGRAM'S
NET COST
SCHEDULE FLEXIBILITY
RETURN ON INVESTMENT
QUALITY OF LEARNING PLATFORM

WORRY **MORE** ABOUT
BOSS NOT BEING SUPPORTIVE
HAVING NOTHING ELSE TO LEARN
EDUCATIONAL PAUSES
TECHNOLOGY ISSUES

WORRY **LESS** ABOUT
NOT FINDING THE RIGHT TIME
THE COST
THEIR OTHER RESPONSIBILITIES
THE TIME COMMITMENT

...THAN OTHER PROSPECTS SAMPLED.

INFORMATION-SEEKING

DIGITAL PLATFORM USE

AVG

KEY INFORMATION SOURCES
RANKING SITES
PROFESSIONAL SOCIAL MEDIA
ONLINE LEARNING YOUTUBE
PROFESSIONAL JOURNALS

PLATFORMS TO CONSIDER
INSTAGRAM
AI TOOLS
X
FACEBOOK

INSTITUTIONAL BRAND IMPORTANCE

AVG

Career Builder (4-year Degree) Audience Profile

Demographic and psychographic information about this segment.

AUDIENCE	WHOLE SAMPLE	THIS SEGMENT
All Respondents	n=10,684	n=1,365
Woman	51%	40% (-)
Man	49%	60% (+)
Asian	4%	3%
Black/African American	24%	25%
Hispanic/Latinx	12%	10%
Other Race	5%	5%
White/Caucasian	55%	57%
Single Adult, No Children	33%	34%
Single Adult, Has Children	11%	12%
Married Adult, No Children	11%	10%
Married Adult, Has Chidren	29%	40% (+)
Child/Young Adult	7%	0% (-)
Adult in Multigen Household	9%	4% (-)
Low Income	9%	5% (-)
Lower-middle Income	19%	15% (-)
Middle Income	34%	33%
Upper-middle Income	30%	40% (+)
High Income	8%	7%
No Online Learning Experience	14%	9% (-)
Taken Course w/ Online Elements	30%	27%
Taken a Fully Online Course	30%	30%
Taken a Fully Online Course Load	26%	34% (+)

*Average scores with (+) indicate a statistically significantly higher score than the respondent average. Scores with (-) indicate a statistically lower score.

PERSONALITY

#1	BLUE	90
#2	YELLOW	80
#3	SILVER	71
#4	GREEN	56
#5	PINK	45
#6	RED	38
#7	MAROON	30
#8	ORANGE	26
#9	PURPLE	14

RECOMMENDED MOTIVATOR
STRENGTH/CREATIVITY

"I think the most frustrating thing for me has been that schools think I'm applying to be a normal undergrad, but when they find out I'm online they send me resources for old people. I just want to get a degree online, man. Doesn't mean I'm ancient."

Traditional Student (4-year).

One-size-fits-all really means one-size-fits-none in online learning.

Questions?

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