

Education Practice

What do higher education students want from online learning?

McKinsey surveyed more than 7,000 students in 17 countries to find out which elements of online higher education they value most.

by Felipe Child, Marcus Frank, Jonathan Law, and Jimmy Sarakatsannis



Online programs, both remote and hybrid, are capturing a wider share of higher education across the world. Much of the growth in recent years was driven by the COVID-19 pandemic, which forced campuses to close suddenly and switch to remote classes. But many students, especially those trying to balance work with study, are gravitating toward online learning because of its greater convenience and accessibility compared with traditional classroom instruction. Indeed, new McKinsey research finds that most higher education students want to continue to incorporate at least some aspects of online learning into their education. However, a significant share of students are dissatisfied with the online experiences their universities offer, signaling that higher education institutions could benefit by evolving their online learning models.

To ascertain which learning models higher education students prefer and why, as well as what they find satisfying about online education and which elements of the online learning experience they value most, we surveyed 7,000 students across 17 countries in the Americas, Europe, Asia, and the Middle East (see sidebar “About our research”). The research covers eight dimensions of the online learning experience encompassing 24 attributes, thereby providing a broad view of what higher education students want (Exhibit 1).

This article outlines our findings and offers a three-step action plan that higher education institutions can use to build and improve their online learning programs. Our aim is to help these institutions deliver better experiences and, we hope, outcomes for the students they serve.

What students value—and don’t value—in online learning

All students we surveyed had moved to online classes during the pandemic, and almost 65 percent of them said they want aspects of their learning experience to remain virtual. Even in

France, which had the lowest share, more than half of students said they wanted some learning elements to remain virtual.

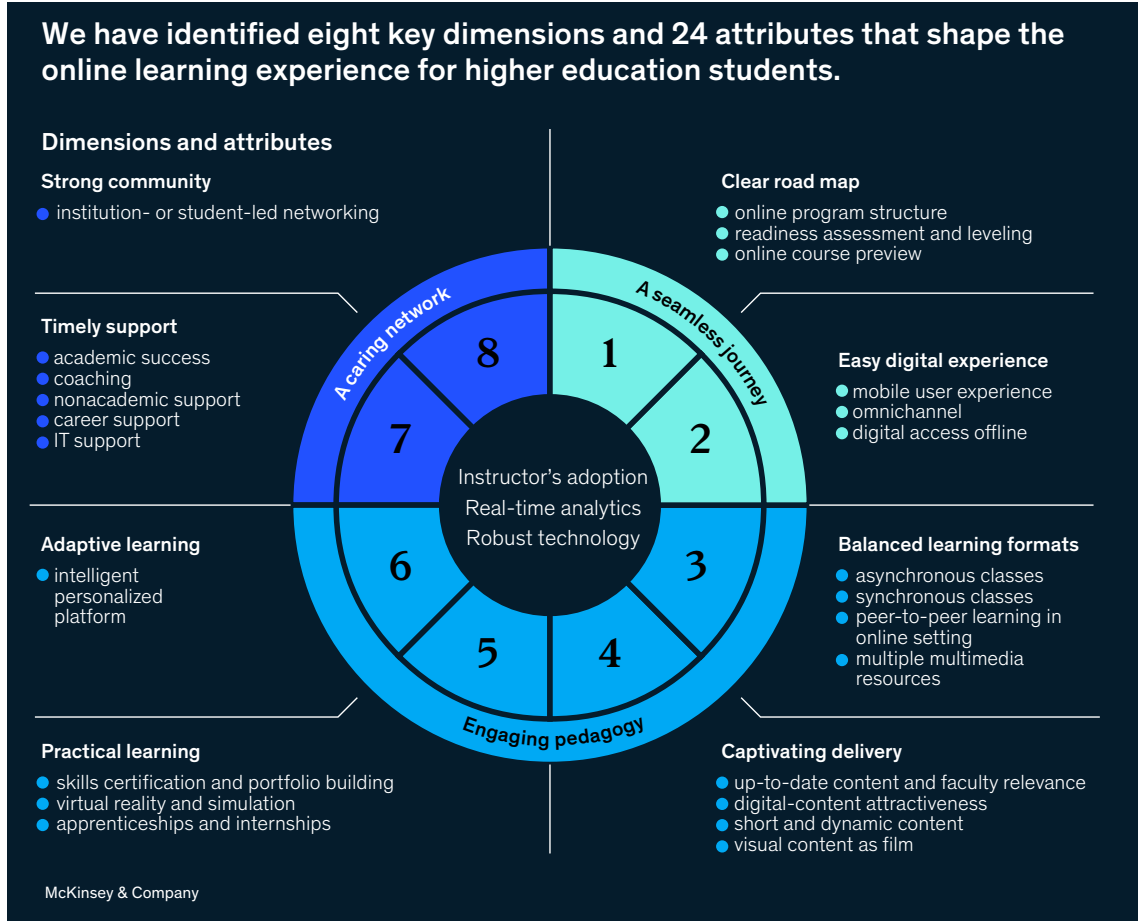
Students say they appreciate the flexibility and convenience. When asked to rank, in order of preference, 11 learning features that should remain or become virtual, students identified these as the top three: recording classes and making them available to watch later, easy access to online study materials, and flexibility that enables students to work and study.

On the flip side, many students still hesitate to enroll in fully remote programs, and students globally cited these top-three reasons: fear of becoming more distracted by studying online, getting bored if the learning experience is not motivating, and lacking discipline to complete the online program. Although these perceptions may in part be preconceived, they

About our research

In April 2022, McKinsey surveyed more than 7,000 students across 17 countries: Argentina, Australia, Brazil, Chile, China, Colombia, France, Germany, India, Italy, Malaysia, Mexico, Peru, Saudi Arabia, Spain, the United Kingdom, and the United States. Our goal was to ascertain and analyze students’ preferences and satisfaction with online learning. To give a holistic view, our survey covered eight components: target students and demographics, satisfaction with college and learning experience, the importance of attributes for ideal online education, attribute performance for ideal online education, modality preferences, reasons for those preferences, impediments to online education, and post-COVID-19 trends. The eight components encompass 24 attributes of online learning experiences.

Exhibit 1



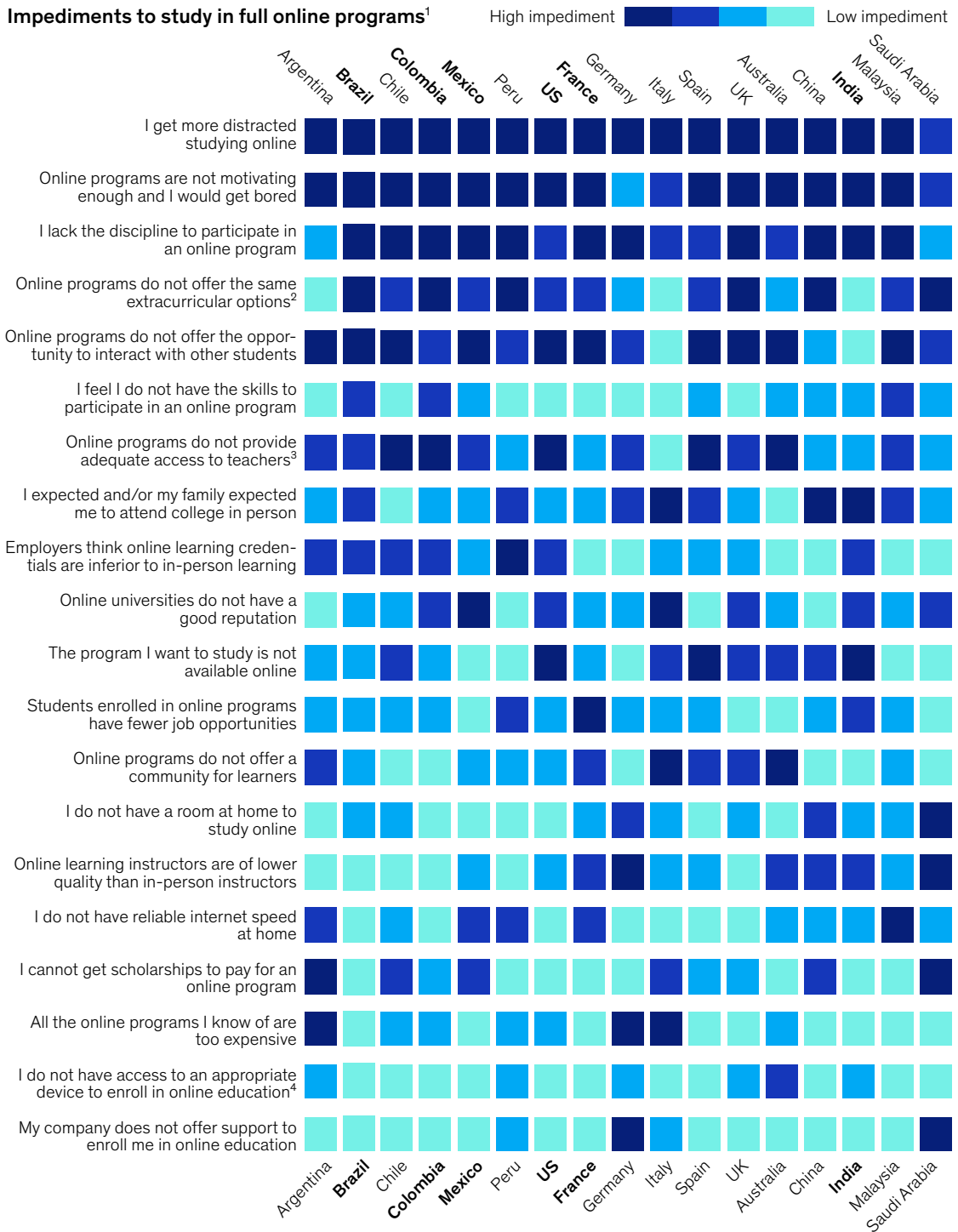
seem to indicate that for a segment of students, online programs have not been able to generate an engaging learning experience (Exhibit 2).

Social aspects also shape attitudes toward in-person, hybrid, and fully remote models. Students who prefer hybrid learning say they like the combination of flexibility and peer-to-peer interactions, whereas students who prefer in-person learning say it offers them more support and peer-to-peer opportunities. In 80 percent of the countries surveyed, students said the top reason they prefer face-to-face education is that getting help from instructors is easier through in-person rather than online learning.

Room to improve

Notably, our research shows that students' satisfaction with online learning at their universities varies significantly across countries (Exhibit 3). When asked whether they would be less or more likely to recommend their university to a friend or family member, students from the Americas were much more inclined than students in other regions to make the recommendation. That finding does not necessarily indicate that educational institutions in countries where students are more dissatisfied offer a poor learning experience, but it could signal that, in general, they are not meeting students'

Top reasons cited by students who do not intend to enroll in online education programs include fear of distraction, lack of discipline, and lack of motivation.



¹The sample size in each of the countries was: Argentina (n = 33), Brazil (n = 584), Chile (n = 32), Colombia (n = 71), Mexico (n = 72), Peru (n = 68), US (n = 346), France (n = 72), Germany (n = 49), Italy (n = 53), Spain (n = 68), UK (n = 45), Australia (n = 38), China (n = 17), India (n = 84), Malaysia (n = 38), Saudi Arabia (n = 29). Analysis from countries in lighter font might not have enough statistical relevance (<70).

²Such as playing sports or participating in cultural events.

³For example, to resolve questions.

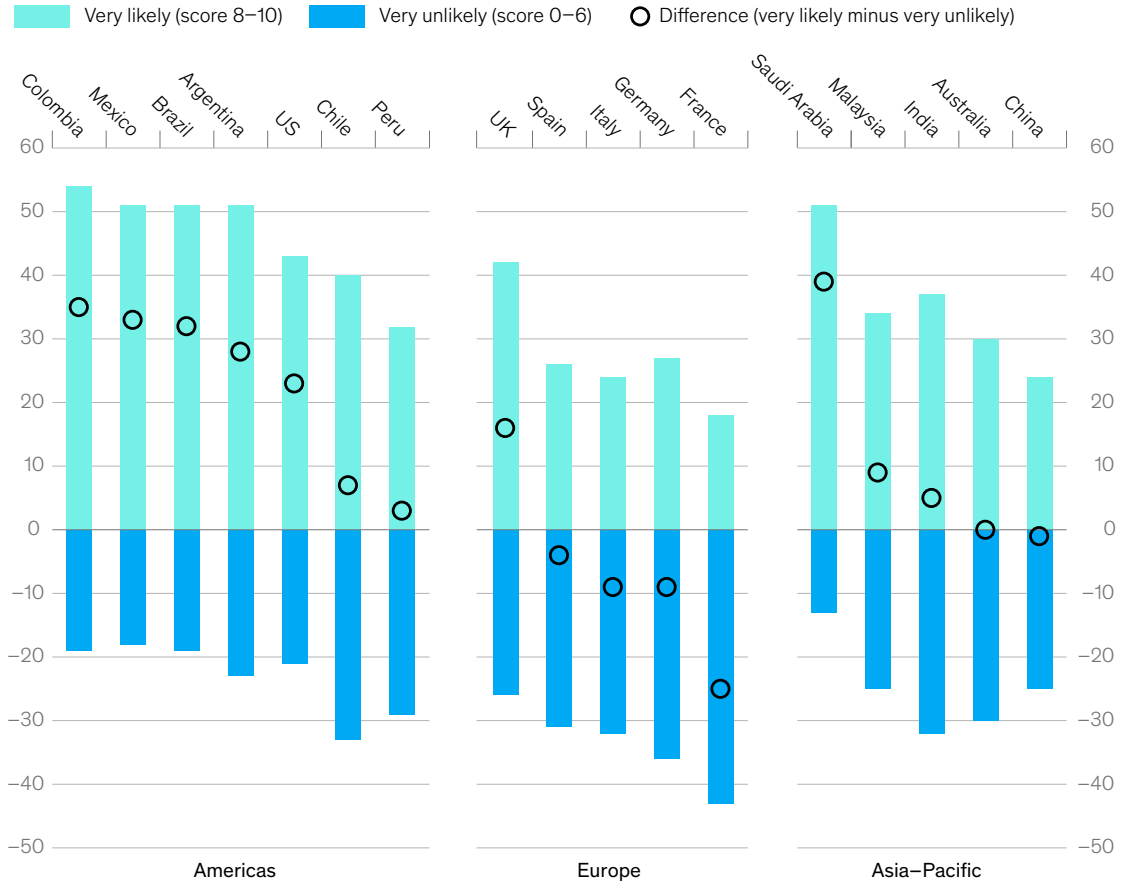
⁴For example, a laptop.

Source: McKinsey Global Research on Online Higher Education in 17 countries

Exhibit 3

Students' satisfaction with their online learning experiences varies significantly across countries.

Likelihood of respondents recommending university to a friend/family member,¹ % (score out of 10)



¹Question: How likely would you be to recommend your university to a friend/family member? The sample size in each of the countries was: Colombia (n = 291), Mexico (n = 203), Brazil (n = 2,187), Argentina (n = 155), US (n = 1,173), Chile (n = 73), Peru (n = 297), UK (n = 253), Spain (n = 202), Italy (n = 269), Germany (n = 165), France (n = 173), Saudi Arabia (n = 101), Malaysia (n = 233), India (n = 302), Australia (n = 283), China (n = 301). Source: McKinsey Global Research on Online Higher Education in 17 countries

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expectations, which vary based on cultural aspects, previous education, etcetera.

Our research suggests that higher education institutions can increase their online learning,

identifying a correlation between higher satisfaction levels and growth in online learning.¹ The two countries in our survey with the largest growth in their online higher education student base—the United States and Brazil—had relatively higher

¹ Growth rates were calculated from public databases, not McKinsey survey data.

levels of student satisfaction, on average, than other nations. This finding suggests that in some countries, educational institutions have generally been able to develop online-program experiences that both attract and engage students.

Core attributes that matter

To help higher education institutions evolve and create more satisfying online programs, we asked students to rank 24 attributes that shape their online learning experiences. Despite important nuances within some regions (see sidebar “Key differences among regions”), three tenets of successful online programs emerged:

1. **The basics still matter.** Features that have always informed the learning experience—such as timely content, course structure, and faculty relevance—are very important for students in every country we surveyed. For instance,

students in 16 of the 17 countries said that having a very well-organized online course with a clear path and a step-by-step guide to achieving their goals was among their five most important elements (Exhibit 4).

2. **Expensive features are not necessarily valued.** Online attributes that are expensive to implement, such as virtual reality (VR), simulations, and sophisticated visual content, are not ranked highly by most students. This finding could indicate that educational institutions and students are still figuring out how to use those technologies effectively. Nevertheless, investment in them is growing. By one estimate, the global market for education VR was set to increase from \$6.37 billion in 2021 to \$8.66 billion in 2022.² Networking elements, such as “peer-to-peer learning in online settings” and “institution- or student-led networking” also ranked in the bottom quartile of importance across most countries.
3. **Student age and program type do not significantly influence the perception of online learning experiences’ quality.** Our survey found that what students value most in online learning did not vary significantly across age groups, field of study, or level of education (undergraduate versus graduate). Although small variations exist, the consistency of perceptions across groups within each geography can guide institutions as they develop learning experiences, with less need to customize them for particular student constituencies.

Key differences among regions

Across the Americas, students in general placed a greater importance on online learning attributes such as skills certification, omnichannel online experiences, and pre-course readiness-assessment and competency leveling. In the United States and most European countries, students said they enjoy studying independently, taking asynchronous classes, and having an intelligent virtual-support platform. In contrast, students in Brazil, Mexico, and Peru value more personalized support, such as a coach to help them navigate school, career, and personal issues. Students in Chile, Italy, Peru, Saudi Arabia, and Spain highly valued having university support in finding internships.

Designing an engaging online experience for students

In our work with higher education institutions, we have identified three steps that help them successfully transform their online education programs to boost student satisfaction and engagement.

² “\$32.9 billion worldwide virtual reality in education industry to 2031: Identify growth segments for investment,” Business Wire, June 9, 2022.

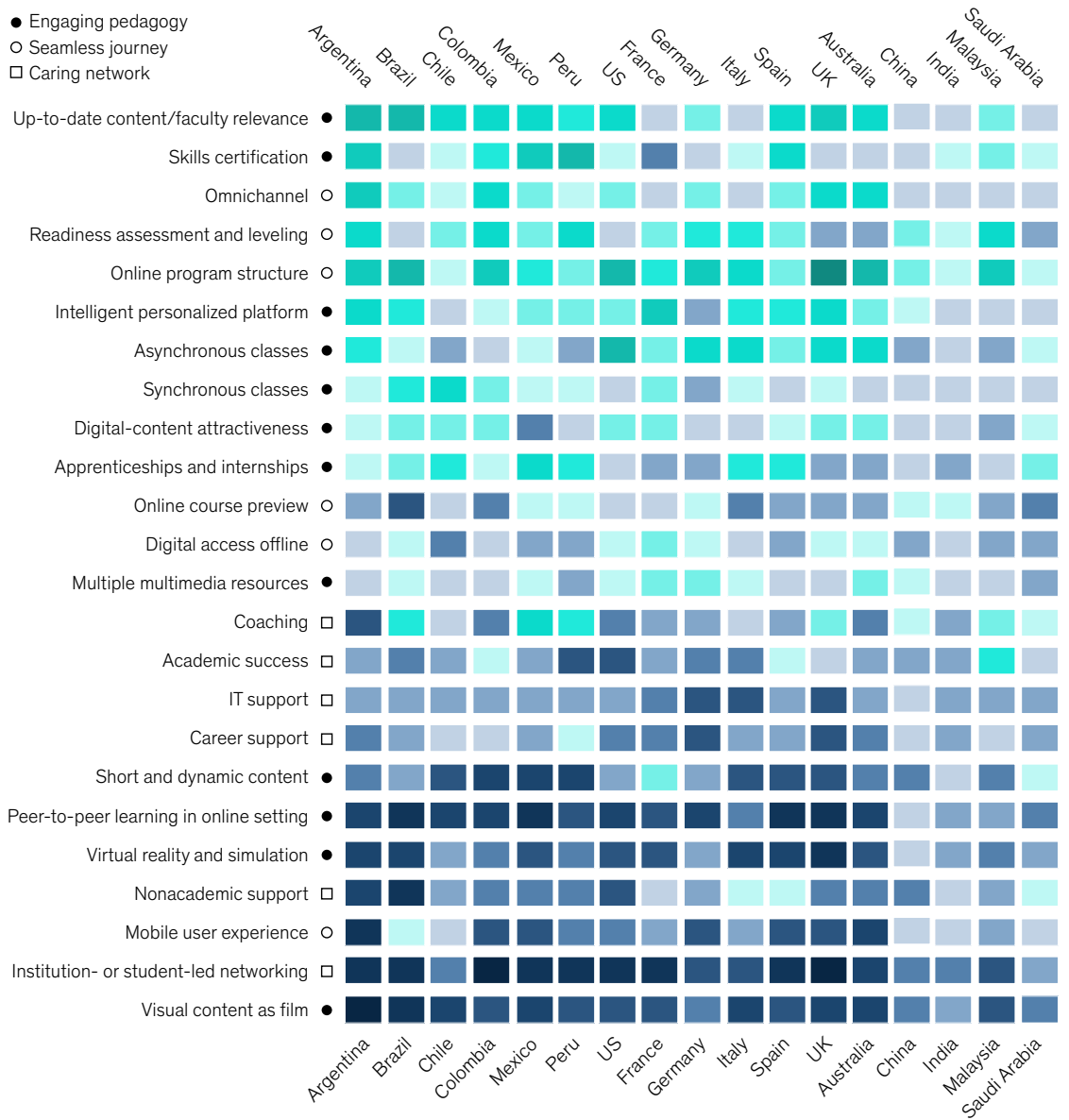
Exhibit 4

Students across the globe agree that basic elements such as up-to-date content and program structure still matter in virtual education.

Importance of attributes for respondents for engagement in virtual education, by cluster and nationality¹

Low High

- Engaging pedagogy
- Seamless journey
- Caring network



¹Question: What is most important to you when it comes to online learning? The sample size in each of the countries was: Argentina (n = 96), Brazil (n = 1,582), Chile (n = 22), Colombia (n = 210), Mexico (n = 111), Peru (n = 233), US (n = 1,123), France (n = 92), Germany (n = 95), Italy (n = 188), Spain (n = 129), UK (n = 181), Australia (n = 233), China (n = 241), India (n = 241), Malaysia (n = 165), Saudi Arabia (n = 75). Analysis from Chile might not have enough statistical relevance (<70). Source: McKinsey Global Research on Online Higher Education in 17 countries

Successfully developing or evolving an online program often begins with finding out what students like about all the programs a university offers.

1. ***Listen to students, set transformation goals, and evaluate the broader online learning landscape.*** Successfully developing or evolving an online program often begins with finding out what students like about all the programs a university offers: hybrid, fully remote, and in-person. Guided by the 24 attributes from our survey, institutions can canvass their students to ascertain the specific areas where online programs are gaining high marks and those that underperform. In our experience, this type of analysis also allows institutions to learn more about the types of students who gravitate toward different learning models, and to identify which groups of students are more likely to enroll in online learning programs.

In addition to compiling a comprehensive dataset of student preferences, institutions can collaborate with other internal stakeholders to determine their target transformation goals—for example, increasing retention, completion, or employability rates. They also can assess how they currently perform on those specific goals compared with other online education providers.







2. ***Combine core attributes of an online program with differentiating elements.*** Once institutions have set specific goals, they can then strategically evaluate which features to target as they enhance the value of their online offerings. Asking four specific questions can help in this process:

- Are there alternatives to adding or enhancing a feature?
- How complex would it be to design and implement this component?
- What are the relative costs and benefits of adding or evolving the new element?
- How will this undertaking distinguish the institution from other online education providers?

3. ***Design an action plan and governance structure for implementation and adoption.*** Once institutions decide which features to add or evolve, they can design an action plan pegged to six criteria: scale, talent, regulation, customization, speed to market, and investment (Exhibit 5). This process often starts with identifying and prioritizing quick wins that will have a high impact on students, are easy to implement, and do not require substantial new investments. Institutions can then establish an implementation strategy by analyzing which initiatives to outsource and which to build with internal capabilities. They can also assemble a team whose members have complementary roles, with the aim of breaking down silos and ensuring that initiatives account for the entire online student experience and are fully adopted by instructors.

Exhibit 5

There are six criteria for higher education institutions to consider when redesigning the online student experience.

Scale	Customization	Talent	Speed to market	Regulation	Investment
					
What kind of scale is the institution looking to achieve? (eg, increasing student adoption in underserved segments)	What level of customization does the university/college want to achieve? (eg, having greater customization to use consumer data, support cross-sell, and enhance the product offering over time)	Does the institution have the necessary talent and skills within the university to allow in-house building?	What is the expected timeline? (eg, building a minimal viable product that can be launched in a short time frame is critical in markets where competitors are building similar offers)	Are there local legal constraints that could affect the way the program is designed? (eg, regulation limiting number of virtual hours in undergraduate programs)	What is the budget? Are there financial constraints?

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Our research findings are clear. Most higher education students who were forced into remote classes during the pandemic want aspects of their education to remain virtual. Many, however, are reluctant to enroll in fully online programs, and

some are dissatisfied with the online experiences their universities offer. Institutions can ask their students what they do or do not find satisfying about all learning models. Then they can design and implement strategies to ensure that their online programs deliver better experiences and, ultimately, better outcomes for students.

Felipe Child is a partner in McKinsey's Bogotá office, **Marcus Frank** is a partner in the São Paulo office, **Jonathan Law** is a senior partner in the Southern California office, and **Jimmy Sarakatsannis** is a senior partner in the Washington, DC, office.

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