Online Report Card

Tracking Online Education in the United States

I. Elaine Allen and Jeff Seaman with Russell Poulin and Terri Taylor Straut

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Cover design by Mark Favazza.

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Online Report Card - Tracking Online Education in the United States is the thirteenth (and final) annual Babson Survey Research Group report documenting online education in the United States. The Alfred P. Sloan Foundation saw a need and provided the initial support for these reports. The Foundation continued that commitment for eight years, supporting an independent study, offering full privacy for all respondents, and providing free distribution of all report publications. Their vision made these reports possible.

We also thank our current partners, the Online Learning Consortium, Tyton Partners, Pearson, StudyPortals, and WCET for contributing to our research and committing to the same degree of independence and autonomy. Others have also provided support for these efforts over the years, including the Southern Regional Education Board, the Midwestern Higher Education Compact, Inside Higher Ed, and Kaplan University.

Special thanks go out to the College Board, who from 2006 to 2014 included our online enrollment questions in their Annual Survey of Colleges.

We are especially pleased that Russell Poulin and Terri Taylor Straut from WCET have partnered with us on the analysis of the IPEDS data on distance education enrollments in this report.

This report was edited and reviewed by Nate Ralph and we thank him for his suggestions, corrections, and careful attention to detail. As always, Mark Favazza has provided his considerable talents in designing the cover for the report.

Finally, we need to thank those who are most important to this effort: the thousands of higher education decision makers who have provided us with such detailed and thoughtful responses. These reports would not be possible without you, and we hope you find them useful.

I Elaine Allen

Co-Directors, Babson Survey Research Group, February 2016

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FOREWORD

This report marks the end of a series of annual reports on the state of online education among U.S. institutions of higher education. The series began when Frank Mayadas of the Alfred P. Sloan Foundation posed a simple question: "How many students are learning online?" It was soon evident that no one had an answer, and more importantly, that no one was working on finding one. We took on this task to address a specific question about numbers. A task we thought that, while interesting, would be a one-off.

Feedback from the first report convinced us, and the Sloan Foundation, that the need for this information and its underlying dynamics was of continuing interest. Over the course of thirteen annual reports we have seen the number of students taking at least one online course triple with a steep rise and fall in the percent of students studying online at for-profit institutions. Throughout this time we have observed very little change in faculty acceptance of the value and legitimacy of online education.

As we noted last year, the introduction of the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS) tracking of distance education marks a coming of age for online and distance education. This resource will now provide regular, comprehensive information on the extent and role of online and distance education.

Our partners at WCET (WICHE Cooperative for Educational Technologies) are an excellent example of how this rich resource can be used. To help its members, WCET has summarized and analyzed each year's IPEDS distance education enrollment numbers since they first became available. In addition to providing the broad overview of the trends and patterns, WCET has worked hard to understand and communicate issues with the data.[1]

The decision to end the reports in their current form is also based on the maturation of distance education programs in higher education and the growing number of other reports and surveys that have launched since we began this particular effort back in 2003. When more than one-quarter of higher education students are taking a course online, distance education is clearly mainstream.

[1] WCET's Russ Poulin and Terri Straut partnered with Phil Hill (e-Literate blog) to investigate the nature of IPEDS data reporting anomalies. This research identified ways in which enrollments were over or undercounted by some institutions. This resulted in a conversation with the U.S. Department of Education's IPEDS personnel who admonished colleges to follow IPEDS procedures when reporting.

Executive Summary

Online Report Card - Tracking Online Education in the United States is the thirteenth annual report on the state of online learning in U.S. higher education. The survey is designed, administered and analyzed by the Babson Survey Research Group, with additional data from the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS). This study is aimed at answering fundamental questions about the nature and extent of online education.

How Many Students are Learning Online (at a Distance)?

Background: *This report series measures the trend of distance education enrollments continually increasing at rates far in excess of those of overall higher education.*

The evidence: Distance education enrollments continue to grow, even in the face of declining overall higher education enrollments.

- The observed growth rate from 2013 to 2014 of the number of students taking at least one distance course was 3.9%, up from the 3.7% rate for the previous year.
- For the second year in a row the rate of growth in distance enrollments was very uneven; Private not-for-profit institutions grew by 11.3% while private for-profit institutions saw their distance enrollments drop by 2.8%.
- The total of 5.8 million fall 2014 distance education students is composed of 2.85 million taking all of their courses at a distance and 2.97 million taking some, but not all, courses at a distance.
- Public institutions command the largest portion of distance education students, with 72.7% of undergraduate and 38.7% of graduate-level distance students.
- The number of students not taking any distance education courses continues to drop, down 434,236 from 2012 to 2013 and a further 390,815 from 2013 to 2014.

Is Online Learning Strategic?

Background: *Previous reports in this series noted the proportion of institutions that believe that online education is a critical component of their long-term strategy has shown small but steady increases for a decade, followed by a retreat in 2013, and a bounce back in 2014.*

The evidence: The proportion of academic leaders who report that online learning is critical to their institution's long-term strategy has shown the largest-ever one-year decline.

- The proportion of chief academic leaders that say online learning is critical to their long-term strategy fell from 70.8% in 2014 to 63.3% this year.
- Institutions with distance offerings remain steadfast in their belief that it is critical for their long term strategy (77.2% agreeing in 2014 and 77.1% in 2015)
- Institutions with no distance offerings account for all of the year-to-year change (33.8% thought it was critical in 2014, only 19.5% thought it was critical 2015)

Are Online Learning Outcomes Comparable to Face-to-Face Instruction?

Background: *After years of a consistently growing majority of chief academic officers rating the learning outcomes for online education "as good as or better" than those for face-to-face instruction, there was a small reversal in 2013 followed by a rebound in 2014.*

The evidence: The 2015 results show no change in the percentage of academic leaders who view the learning outcomes for online instruction as the same or superior to face-to-face instruction.

- The percent of academic leaders rating the learning outcomes in online education as the same or superior to those in face-to-face instruction was 71.4% in 2015. This represents a drop from the 2014 figure of 77.0%, but still much higher than the 57.2% rate in 2003.
- The proportion that believe the learning outcomes for online education are inferior to those of face-to-face instruction is now at 28.6%.
- As expected, leaders at schools with large distance education enrollments (10,000 or more) are the most positive; 41.7% rate online as "superior" or "somewhat superior" to face-to-face instruction.
- Academic leaders remain far more positive about the learning outcomes for blended instruction than they are for online education.

Faculty Acceptance of Online Education

Background: *For the past twelve years no more than one-third of chief academic officers reported that their faculty accepted the value and legitimacy of online education.*

The evidence: While the number of distance programs and courses online continue to grow, the perception of chief academic officers of the acceptance of this learning modality by faculty has not improved.

- Only 29.1% of chief academic officers believe their faculty accept the value and legitimacy of online education. This rate is lower than the rate recorded in 2004.
- Chief academic officers at institutions with large distance enrollments have the most positive view of their faculty's acceptance; 60.1% of those at institutions with 10,000 or more distance enrollments report faculty acceptance.
- In contrast, only 11.6% of the leaders of institutions with no distance offerings believe their faculty accept the value and legitimacy of online education.

Massive Open Online Courses (MOOCs)

Background: *Reports from the last three years noted that only a small number of institutions either had or were planning a Massive Open Online Course (MOOC).*

The evidence: The results for 2015 are very similar to previous years — a small segment of higher education institutions are experimenting with or planning MOOCs. Most institutions have decided against a MOOC, or remain undecided.

- The percent of higher education institutions that currently have a MOOC increased from 2.6% in 2012 to 5.0% in 2013, to 8.0% in 2014, and now stands at 11.3%.
- Many institutions (27.8%) report they are still undecided about MOOCs, while the single largest group (58.7%) say they have no plans for a MOOC.

DEFINITIONS: ONLINE LEARNING AND MOOCS

This report focuses on online courses and programs offered as a normal part of an institution's programs, as well as Massive Open Online Courses (MOOCs) typically offered for free to those outside of the institution's student body.

An online course is defined as one in which at least 80% of the course content is delivered online. Face-to-face instruction includes courses in which zero to 29% of the content is delivered online; this category includes both traditional and web-facilitated courses. The remaining alternative, blended (or hybrid) instruction, has between 30% and 80% of course content delivered online.

The definition of an online course has remained consistent for the thirteen years these national reports have been conducted. These definitions were presented to the respondents at the beginning of the survey and repeated in the body of individual questions where appropriate. Portions of the report use enrollment information from the National Center for Education Statistics' Integrated Postsecondary Education Data System, which uses a different definition for "distance education."

While there is considerable diversity among course delivery methods used by individual instructors, the following is presented to illustrate the prototypical course classifications used in this study.

Proportion of Content Delivered Online	*Type of Course*	*Typical Description*
0%	Traditional	Course where no online technology used — content is delivered in writing or orally.
1 to 29%	Web Facilitated	Course that uses web-based technology to facilitate what is essentially a face-to-face course. May use a learning management system (LMS) or web pages to post the syllabus and assignments.
30 to 79%	Blended/Hybrid	Course that blends online and face-to-face delivery. Substantial proportion of the content is delivered online, typically uses online discussions, and typically has a reduced number of face-to-face meetings.
80+%	Online	A course where most or all of the content is delivered online. Typically have no face-to-face meetings.

IPEDS defines a distance education course as "A course in which the instructional content is delivered exclusively via distance education. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education."[2] Full details of all IPEDS definitions are included in the Methodology section of this report.

While sharing many characteristics with online and distance courses, MOOCs are somewhat different. Oxford Dictionaries Online defines a MOOC as: "A course of study made available over the Internet without charge to a very large number of people."[3] MOOCs typically differ from "regular" online courses in that:

- Those participating are not registered students at the school.
- They are designed for unlimited participation and open access via the web – no tuition is charged.
- There is typically no credit given for completion of the MOOC.

Schools may offer online learning and MOOCs in a variety of ways. The survey asked respondents to characterize their face-to-face, blended, and online learning by the level of the course (undergraduate, graduate, non-credit, etc.). Similarly, respondents were asked to characterize their face-to-face, blended, and online program offerings by level. They were also asked about any MOOC offerings.

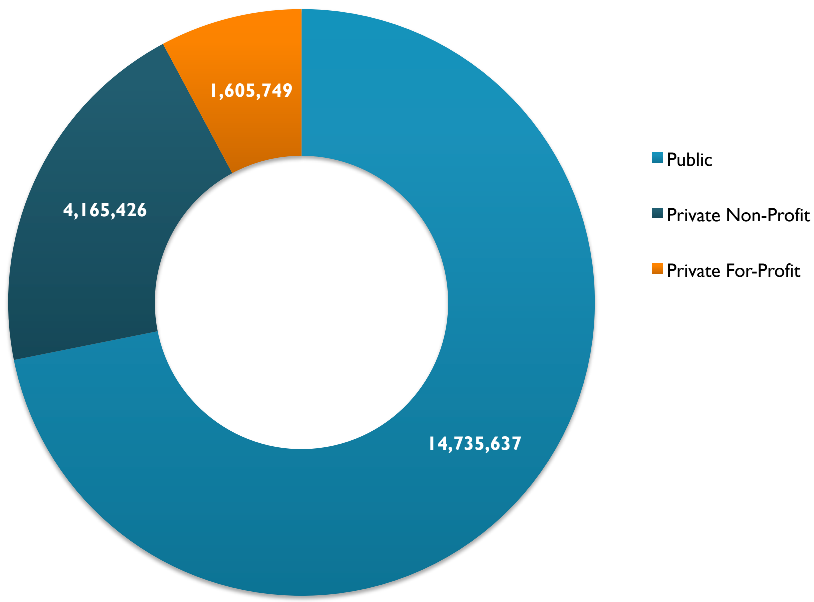
[2] http://nces.ed.gov/ipeds/glossary/?charindex=D
[3] http://www.oxforddictionaries.com/us/definition/american_english/MOOC

DISTANCE ENROLLMENTS

Overall Higher Education Enrollment

Based on federal data from fall 2014 (the most recent year available), the vast majority of all U.S. higher education students attend public institutions. Public institutions represented nearly three quarters of all fall 2014 enrollments (72%), private non-profits represented 20%, and for-profit institutions enrolled only 8% of all students.

OVERALL HIGHER EDUCATION ENROLLMENT: FALL 2014

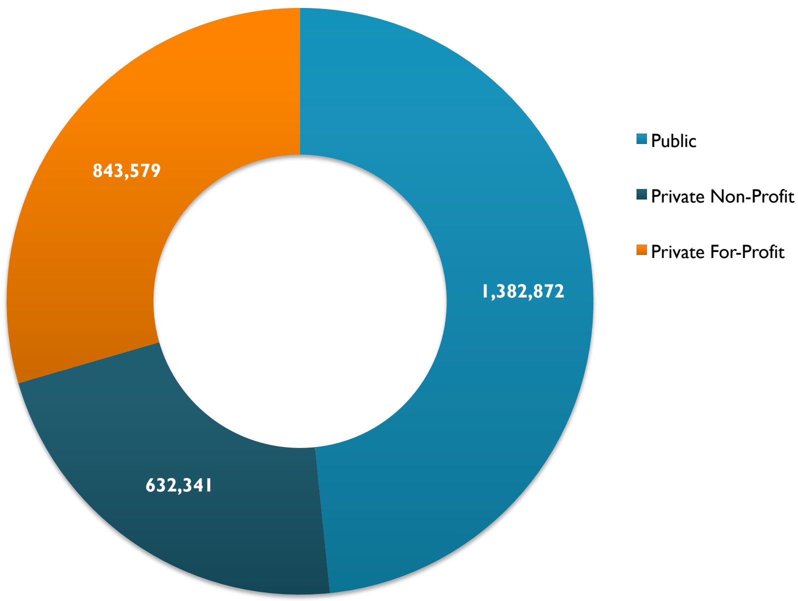


It is important to keep in mind the relative size of the higher education sectors in reviewing the following data on Distance Education enrollments. Since public institutions represent such a large proportion of enrollments, even a small percentage change in that sector can have a large impact on the totals.

Enrollment of Students Taking Exclusively Distance Education Courses

There were in excess of 2.8 million students taking all of their higher education instruction at a distance in fall of 2014. This represents one-in-seven (14%) of all higher education students. Almost half (1,382,872, or 48%) of those students learning exclusively at a distance did so at a public institution. For-profit institutions accounted for slightly less than one-third (843,579, or 30%) of exclusively distance enrollments. "Exclusively" distance education students are a growing segment of the overall student population. For last year's analysis of fall 2013 enrollments, they comprised 12.5% (one-in-eight) of all higher education students.

ENROLLMENT OF STUDENTS TAKING EXCLUSIVELY DISTANCE EDUCATION COURSES: FALL 2014

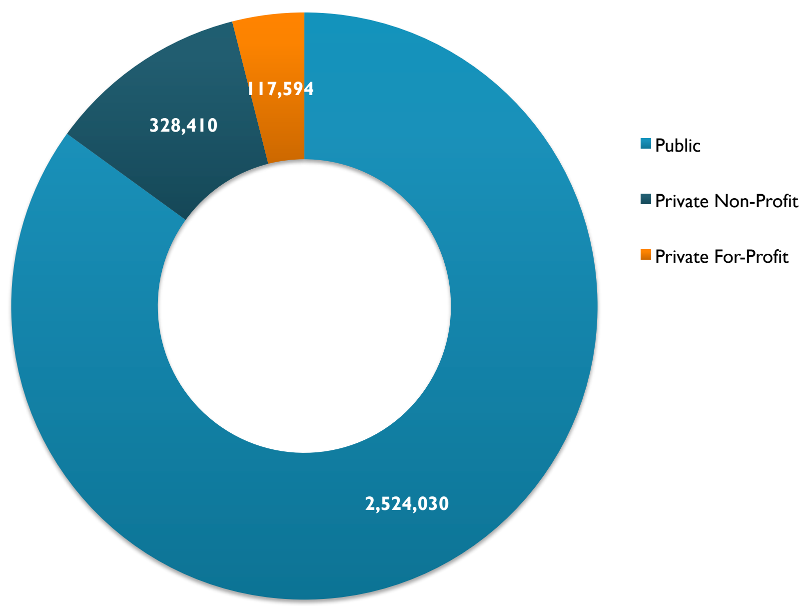


Policy-makers, members of the press, and higher education pundits often equate distance learning with for-profit institutions. While for-profit institutions tend to enroll more fully distance students as a percentage of their population, they account for less than one-third of all distance students. Private non-profit institutions enrolled 21% of exclusively distance students. There were more students learning "Exclusively" at a distance at public and non-profit institutions (2,015,213) than were enrolled in all for-profit institutions (1,605,749), whether face-to-face or at a distance.

Enrollment of Students Taking Some of Their Courses at a Distance

There were more students taking some, but not all, of their courses at a distance than the number who took exclusively distance courses (2,970,034, versus 2,858,792). This corresponds to one-in-seven (14%) of all higher education students taking "Some But Not All" of their courses at a distance. Public institutions represented the vast majority (85%) of "Some But Not All" distance education enrollments in 2014. Private non-profits represent 11% of these enrollments, while the for-profit institutions represent just 4% of distance education enrollments in this category.

ENROLLMENT OF STUDENTS TAKING SOME OF THEIR COURSES AT A DISTANCE: FALL 2014

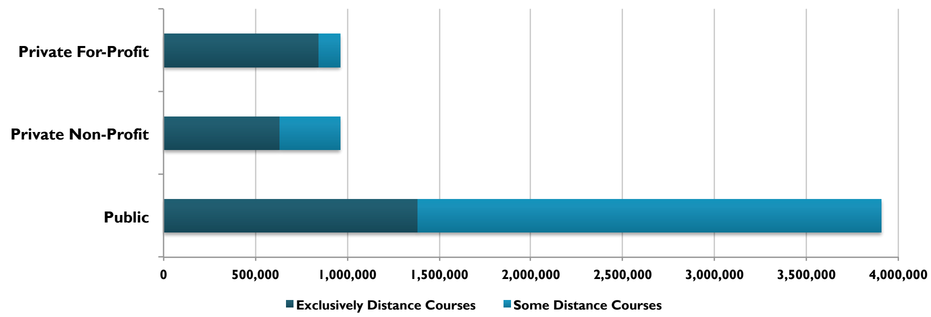


The large majority of public enrollments in "Some But Not All" distance education suggests that distance courses have become part of the mix of course offerings at many public universities. It appears that many traditional universities are using online courses to meet demand from residential students, address classroom space shortages, provide for scheduling flexibility, and/or provide extra sections. The notion of a "distance" for these students changes from being geographically separated to one of time shifting.

Enrollment of Students Taking At Least One Course at a Distance

With more than one in four students (28%) taking some of their courses at a distance, these courses seem to have become a common part of the course delivery modality for many students. More than two-thirds (67%) of students enrolled in "At Least One" distance course do so at a public institution.

ENROLLMENT OF STUDENTS TAKING AT LEAST ONE COURSE AT A DISTANCE: FALL 2014



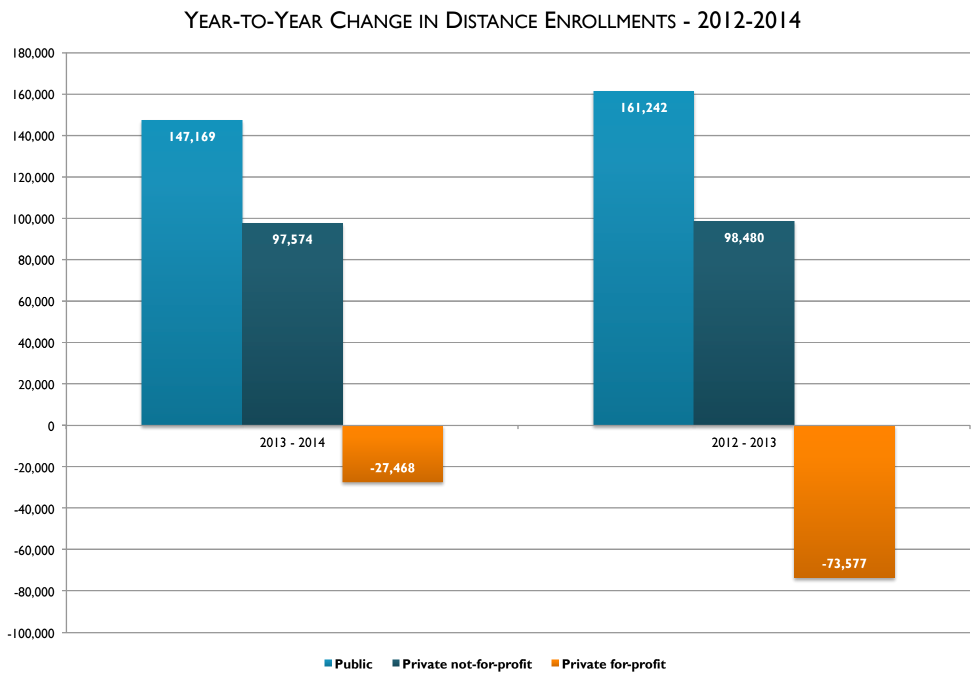
There is variation in the proportion of students taking “At Least One” course at a distance by sector:

- 27% of public institution students took at least one distance course.
- 23% of private non-profit students took at least one distance course.
- 60% of private for-profit students took at least one distance course.

Judging by the enrollments, private colleges may view distance courses as primarily a tool to service distance students. Public colleges, on the other hand, appear to incorporate distance courses for both on-campus and distance students.

Changes in Distance Enrollments

Distance education enrollments continue to grow at a healthy rate, showing a 7% increase overall between fall 2012 and fall 2014. The growth in distance enrollments among public and private non-profit institutions during this time of overall enrollment decline is noteworthy. Many institutions are continuing to add distance education programs and grow existing ones even while campus-based enrollments are declining.

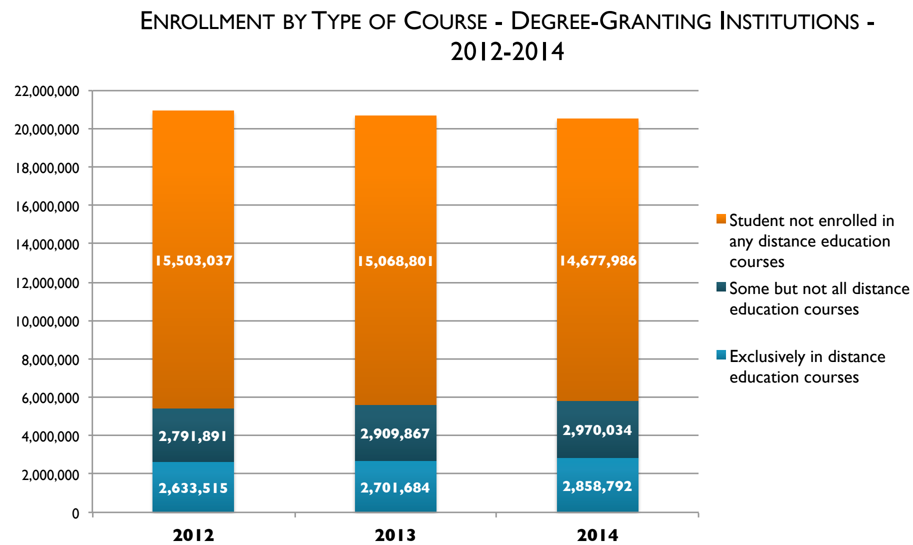


The 2012 to 2014 growth represents 403,420 additional distance students over this two-year time period. But comparing 2014 distance enrollments to data from 2012 reveals great disparities by sector:

- The not-for-profit sector experienced tremendous growth (26%, or 196,054 students).
- The for-profit sector experienced a significant decrease (-10%, or -101,045 students).
- Public institutions experienced a 9% growth (308,411 students).

The for-profit sector almost fell to last place among sectors enrolling the most distance education students. This is a remarkable outcome, considering the for-profit sector led the private, non-profit sector by more than one-quarter million (297,521) enrollments in 2012. In 2014, that difference fell to only 422 enrollments.

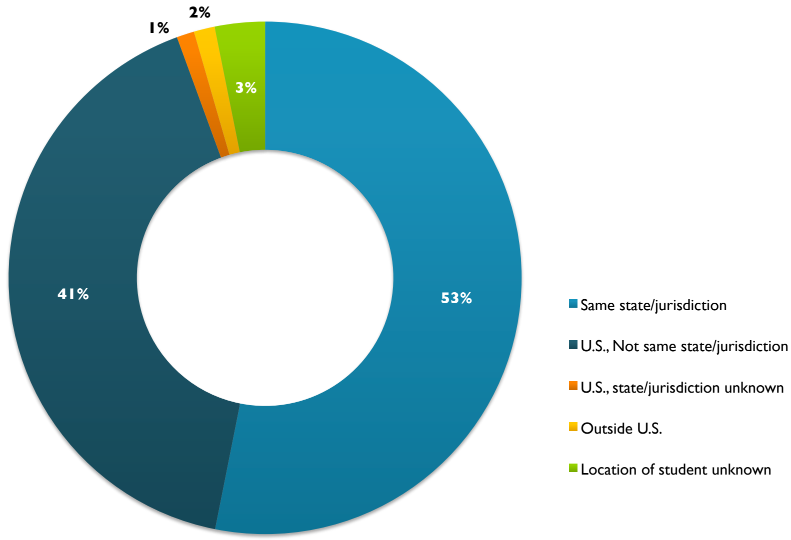
The growth in the number of distance education students is all the more impressive given that overall enrollments in higher education have been shrinking during this same time period. Overall enrollments decreased by 248,091 students from 2012 to 2013, and then by a further 173,540 from 2013 to 2014. The combination of shrinking overall enrollments and growing distance enrollments means that the number of students not taking any distance education course has decreased even faster, losing 434,236 students from 2012 to 2013 and 390,815 from 2013 to 2014. This translates into 825,051 fewer students not taking any distance courses in 2014 than two years earlier in 2012.



Location of Distance Education Students

The majority (53%) of students taking exclusively distance education courses reside in the same state as the institution that they are attending. The next largest group (41%) resides in the U.S., but in a different state than the institution they are attending. U.S. colleges and universities continue to serve very few international distance education students, less than 2% in any sector.

LOCATION OF STUDENTS ENROLLED EXCLUSIVELY IN DISTANCE EDUCATION COURSES - 2014

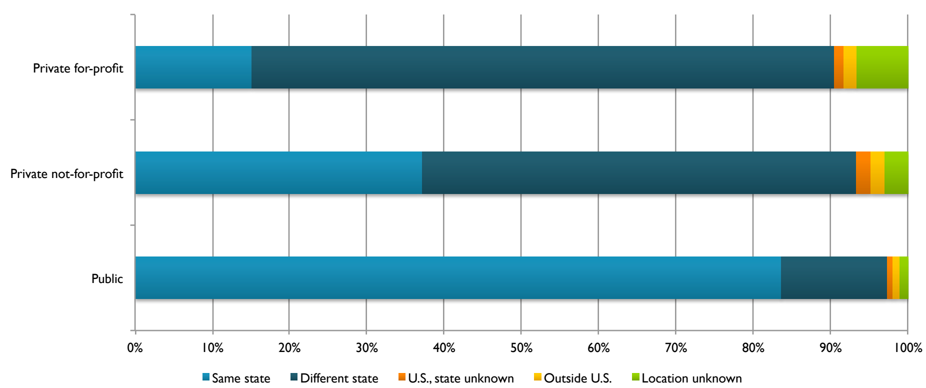


Institutions are expected to have obtained a state's authorization (or other approval, if needed) prior to enrolling students in that state. The first step in the state authorization process is for an institution to know where its students are located. The sector analysis shows wide differences in student location by type of institution:

- Public institutions report that 84% of their exclusively distance students are from inside the institution's state.
- Private for-profit institutions report that 75% of their exclusively distance students are from outside of the state.
- Private non-profit institutions report that over half (56%) of their exclusively distance enrollments are from out-of-state.

It is not surprising that public institutions focus on students within their own state, especially when public institutions sometimes charge differential tuition for non-resident students. It is surprising that the private for-profit sector has so many students in the "State Unknown" and "Location Unknown/Not Reported" categories. The for-profit institutions are more closely regulated by the states. The institutions from this sector that we have observed have long been in compliance with state authorization rules, even before the state authorization issue was highlighted in the federal regulations of 2010. A few institutions with large enrollments account for most of the enrollments with location unknown.

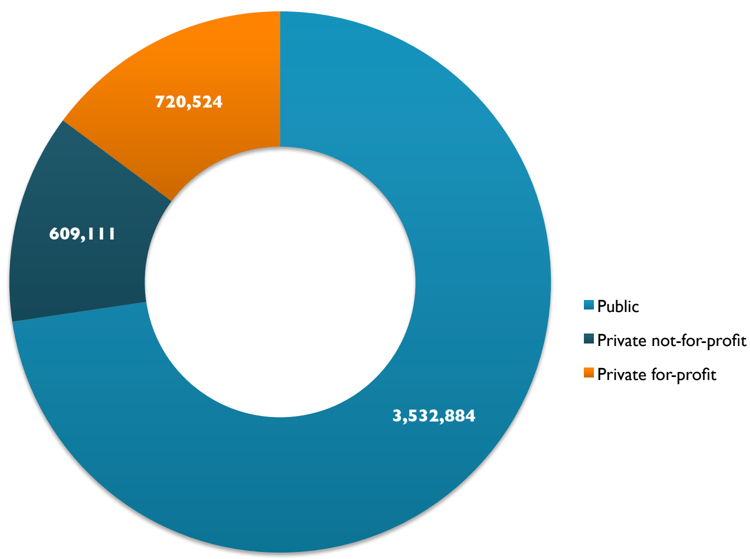
LOCATION OF STUDENTS ENROLLED EXCLUSIVELY IN DISTANCE EDUCATION COURSES - 2014



Level of Distance Education Students

There are nearly five times as many undergraduate enrollments (4,862,519) as graduate enrollments (966,307) among students taking at least one distance education course. Public institutions represent nearly three out of four (73%) distance education enrollments at the undergraduate level. Private, non-profit institutions represent 12% of undergraduate distance enrollments, while private for-profits institutions represent 15%.

TYPE OF INSTITUTION - UNDERGRADUATE STUDENTS ENROLLED IN DISTANCE EDUCATION COURSES - 2014



It is sometimes difficult to assemble all of the general education courses required to offer a fully distance undergraduate program. Even with those barriers, colleges enrolled more than two million students exclusively at a distance. This category represents more than 10% of all higher education students enrolled in Fall 2014. Universities often start with graduate programs when implementing distance education, as their shorter duration makes them more cost-effective to develop and deliver than undergraduate programs.

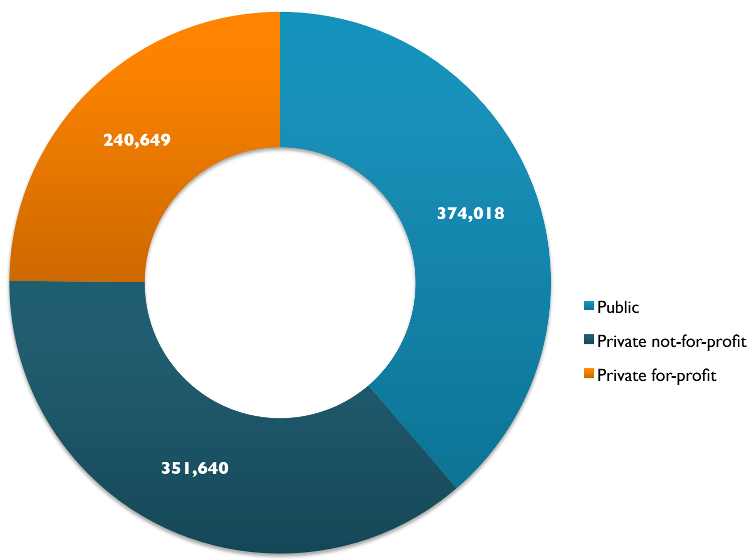
DISTANCE EDUCATION ENROLLMENTS BY LEVEL OF STUDENT: FALL 2014

	Undergraduate		*Graduate*	
	All distance	*Some distance*	*All distance*	*Some distance*
Public	1,139,020	2,393,864	243,852	130,166
Private not-for-profit	371,365	237,746	260,976	90,664
Private for-profit	615,255	105,269	228,324	12,325
Total	2,125,640	2,736,879	733,152	233,155

Public institutions continue to lead in overall distance education enrollments, despite the efforts of the other sectors to increase their distance enrollments. Public institutions command the majority of "Some But Not All" enrollments at both the undergraduate level (87%) and at the graduate level (56%). Private non-profits represent the second largest enrollment group at both levels, 9% of undergraduate enrollment, and 39% of graduate enrollments in "Some But Not All" distance education. Private for-profits represent the smallest enrollment group, 5% of undergraduate enrollments and 4% of graduate enrollments in the "Some But Not All" category of distance education courses.

Public institutions represent the largest proportion of graduate enrollment at a distance (39%). Private non-profit institutions represent 36% of graduate enrollments online, while private for-profit institutions represent 25% of graduate enrollments online.

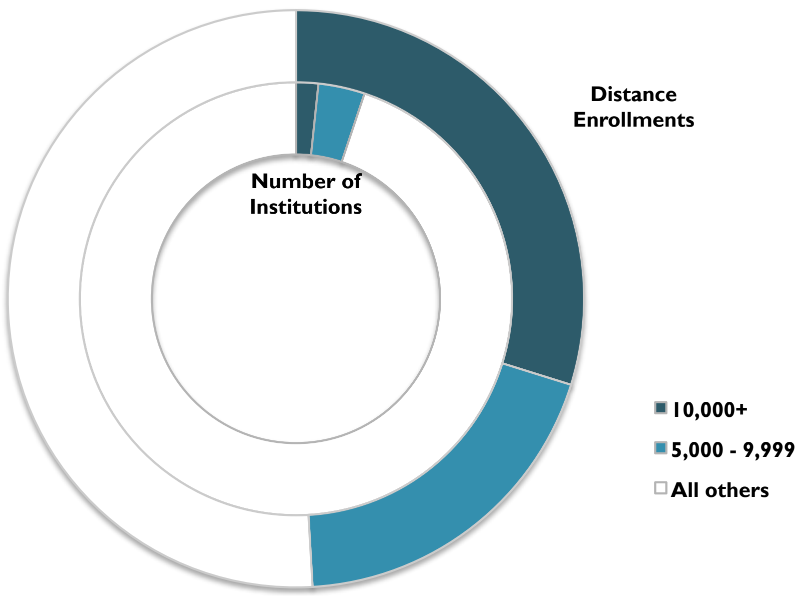
TYPE OF INSTITUTION - GRADUATE STUDENTS ENROLLED IN DISTANCE EDUCATION COURSES - 2014



Concentration of Distance Enrollments

Students enrolled in distance education are highly concentrated in a relatively small number of institutions. There were 4,806 active degree-granting institutions open to the public in fall of 2014 in the IPEDS data files. The 5,828,826 fall 2014 students enrolled in distance education courses were spread across 3,324 (69.2%) of these institutions. However, almost half of these students are concentrated in just five percent of the institutions: the 247 institutions with 5,000 or more distance enrollments represent only 5.1% of all institutions, but 49.1% of the student enrollments. The 80 institutions with 10,000 or more distance enrollments represent only 1.7% of all institutions, but command 29.8% of all distance enrollments.

PROPORTION OF DISTANCE ENROLLMENTS FROM INSTITUTIONS WITH 5,000+ DISTANCE STUDENTS



Looking at this in another way, the top 1% of all institutions represents 29.8% of distance enrollments, and the top 10% of institutions represent 64.5%. Having close to two-thirds of all distance enrollments in only 10% of all higher education institutions is a very high degree of concentration.

There are several important implications of this high degree of distance enrollment concentration. One of the most important is that decisions of a relatively small number of academic leaders have a very large impact on the overall distance education universe. The opinions of key leaders among the top 481 institutions (the top 10%) on how they market and evolve their distance programs will impact the large majority of distance students. It is therefore important to understand how the views and opinions of these select leaders are the same and/or different from those at other institutions offering distance education.

From the student perspective, the concentration of large numbers of students in a small number of schools means that most distance students are enrolled in large institutions with large numbers of fellow distance classmates. Results over the years have shown that adding and growing distance education programs requires considerable resources – resources that smaller institutions are typically lacking.

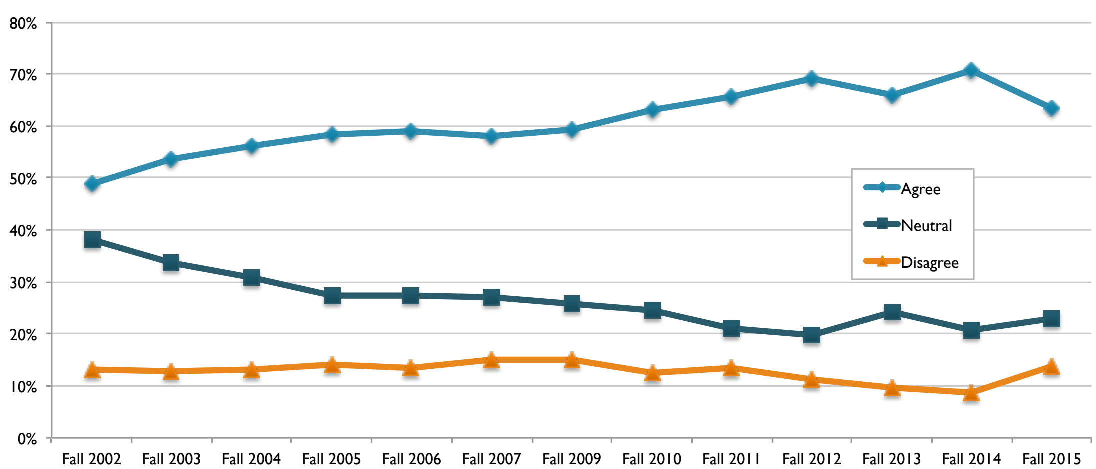
Attitudes and Practice

Is Online Learning Strategic?

The long-term pattern in the proportion of institutions that agreed with the statement "Online education is critical to the long-term strategy of my institution" has seen small year-to-year increases in the proportion believing that it was critical for their long-term strategy, a steady decline among those who were neutral, and a consistent group of holdouts that disagreed. This pattern was upset in 2013, where the results contained both the largest-ever *decrease* in the proportion that agreed that online education is critical for their strategy, and the first-ever increase in the rate of those saying that they are neutral on the topic. Results for 2014, however, reflected a return to the historic pattern.

Results for 2015 mirror those for 2013, with the largest-ever drop in the proportion of institutions reporting that online education is critical to their long-term strategy: from 70.8% in 2014, to 63.3% in 2015. The proportion that disagreed with this statement increased from 8.6% in 2014 to 13.7% in 2015.

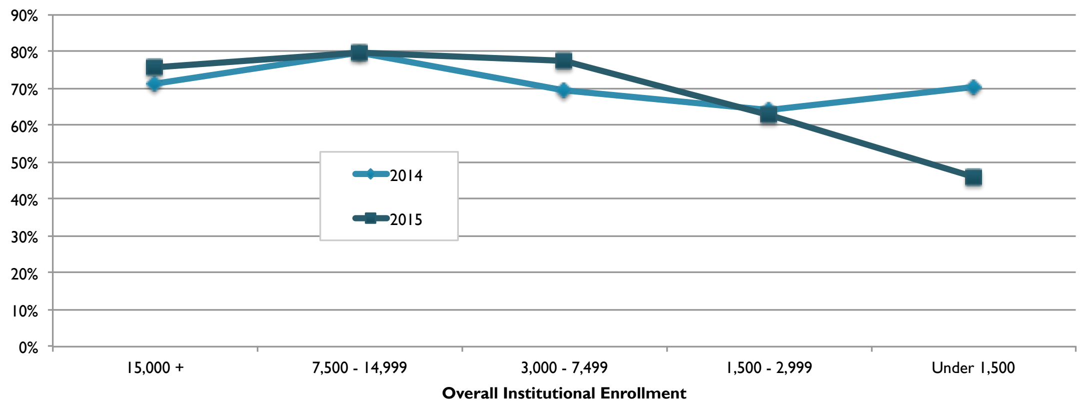
Online Education is Critical to the Long-term Strategy of my Institution – 2002 to 2015



Does this largest-ever drop in the percentage of institutions saying that online education is critical for their long-term strategy mean that institutions are turning away from online education and will be closing down online courses and programs? Who are the institutions that have changed their opinion over the past year – and what impact will this change of heart have on the future on online education?

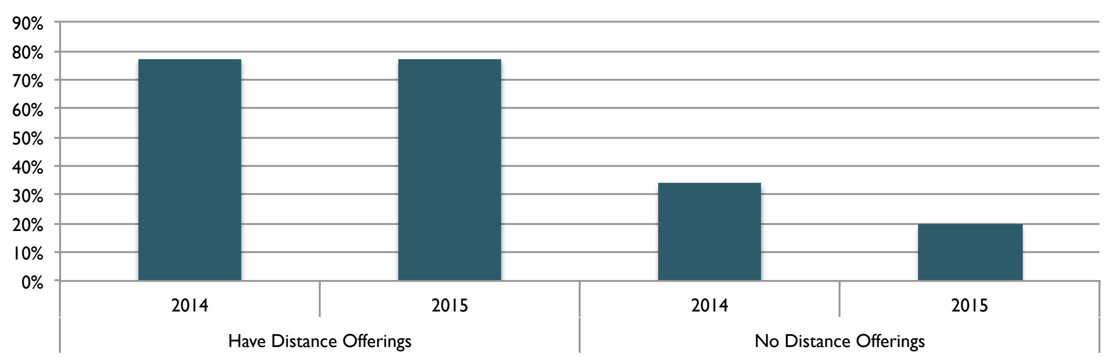
Comparing the pattern of responses about the strategic importance of online education over the past two years shows that virtually all the change is occurring among the very smallest institutions. In 2014, 70.2% of these small institutions reported that online education was a critical part of their long-term strategy. By 2015 this had dropped by a third to only 46.0%.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY BY OVERALL ENROLLMENT – 2014 AND 2015



Why are these small schools turning away from online education? Analysis of the drop between 2012 and 2013 showed that institutions that did not yet have online or distance offerings accounted for all of the decrease. Examining the 2014 to 2015 drop reveals the exact same pattern: those institutions with online offerings are just as postitive about it as ever, but those who have no offerings are no longer saying that it will be part of their future plans.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY BY DISTANCE OFFERINGS – 2014 AND 2015

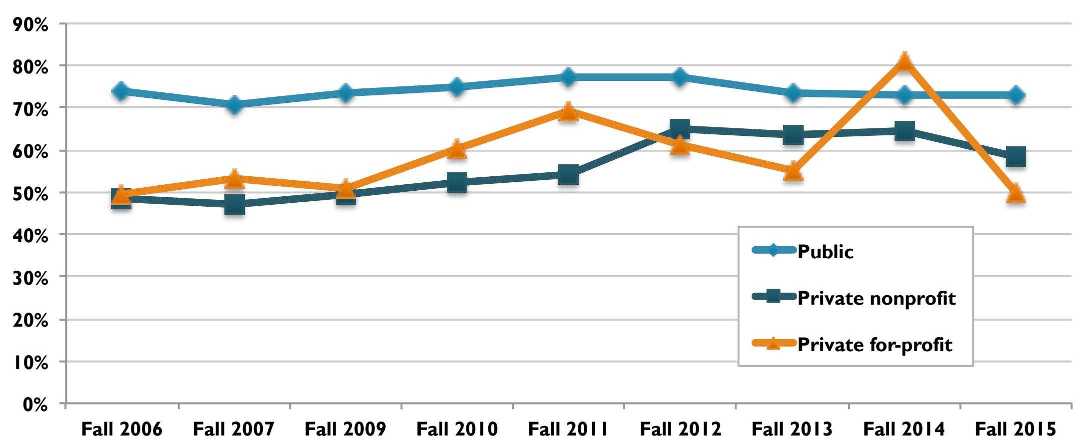


The change of opinion among the small institutions that no longer have aspirations to add online courses and/or programs will have no impact on the distance education universe. While 52.3% of all higher education institutions have overall enrolments of 1,500 or fewer total students, this sector accounts for only 6.3% of all enrollments. Those small institutions without any online offerings are among the smallest, and enroll only 2.1% of all students. If all of these institutions decided tomorrow to begin an aggressive push to add online courses, the total number of distance students would change by only about one percentage point.

This is not a new issue; a common theme over the course of these reports has been that the smallest institutions have consistently reported an inability to add distance programs because of resource limitations. The most recent results seem to indicate that rather than year after year of reporting aspirations to add online courses, many of them have decided it is no longer in their future.

Public institutions, which began offering online courses and programs sooner than either private nonprofit or private for-profit institutions, have consistently maintained that these types of programs were critical to their long-term strategy. The proportion of private nonprofit institutions that held this view has increased over time and then dropped this past year, but has always been below the level of public institutions.

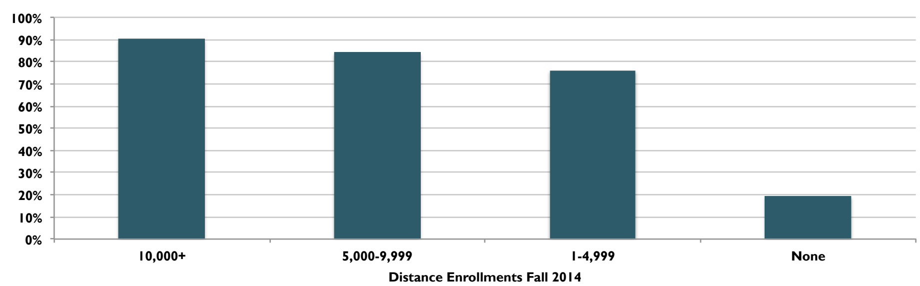
ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY BY INSTITUTIONAL CONTROL – 2006 TO 2015



Private for-profit institutions continue to show the greatest volatility. After several years with a level similar to private nonprofits, their level of agreement that online education is critical for their long-term strategy increased faster for a few years, dropped back in 2012 and 2013, and then bounced back in 2014. The 2014 results now appear to be a bit of false optimism, as 2015 responses show a huge decrease in the proportion of private for-profit institutions reporting that online education is critical for their long-term strategy.

A large majority of all institutions with distance education students report that online education is critical to their long-term strategy. The proportion ranges from 76.3% at institutions with less that 2,500 distance students enrolled, to 90.3% among institutions with greater than 10,000 distance students. A much smaller number of schools with no current distance enrollment (19.5%) report aspirations for adding this type of program.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY BY DISTANCE ENROLLMENTS – 2015

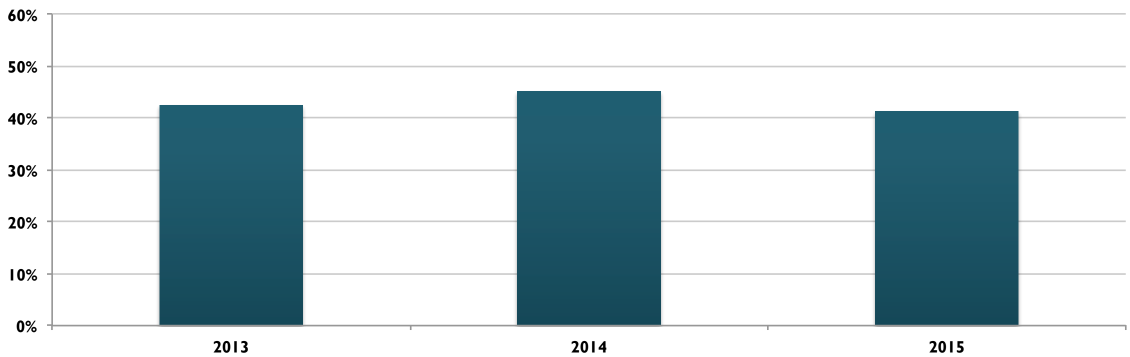


Not all institutions that report that online education is critical to their long-term strategy have actually incorporated this belief into their formal strategic plan. This gap was first evident in a series of studies the Babson Survey Research Group conducted for the APLU-Sloan National Commission on Online Learning. These examined Association of Public and Land-grant Universities (APLU) presidents and chancellors, Tribal College and University (TCU) presidents, and the presidents and chancellors of National Association for Educational Opportunity (NAFEO) member-institutions[4].

[4] The A·P·L·U-Sloan National Commission on Online Learning, Online Learning as a Strategic Asset: A Survey of APLU Presidents and Chancellors, The A·P·L·U-Sloan National Commission on Online Learning, Online Learning as a Strategic Asset: A Survey of NAFEO Presidents and Chancellors, and The A·P·L·U-Sloan National Commission on Online Learning, Online Learning as a Strategic Asset: A Survey of AIHEC Presidents and Chancellors.

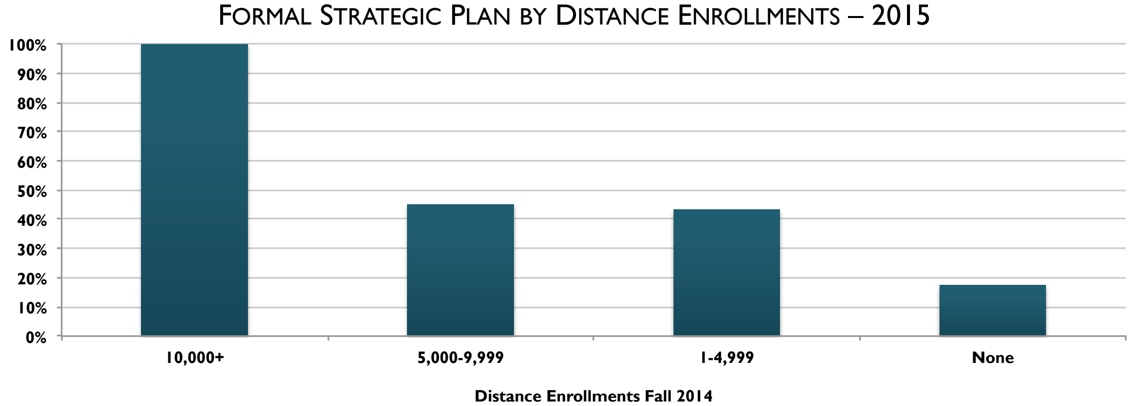
This series of annual studies of online education have shown that this gap is an important issue across all of higher education. There has been little change over the past several years; the most recent responses for 2015 confirm that the gap continues to exist, with only 41.3% of institutions reporting inclusion in their formal strategic plan.

ONLINE EDUCATION IS SIGNIFICANTLY REPRESENTED IN MY INSTITUTIONS FORMAL STRATEGIC PLAN – 2013-2015



The picture is very different, however, when we turn our attention to the institutions with the largest numbers of distance student enrollments. Among this small number of institutions (less than 2% of all higher education institutions) that command the lion's share of the distance enrollments (29.8%), all report significant inclusion in their formal strategic plan. Less than one-half of schools with lower levels of distance enrollments say that it is included in their plan, while 17.4% of those with no current distance enrollments say that they are planning for them.

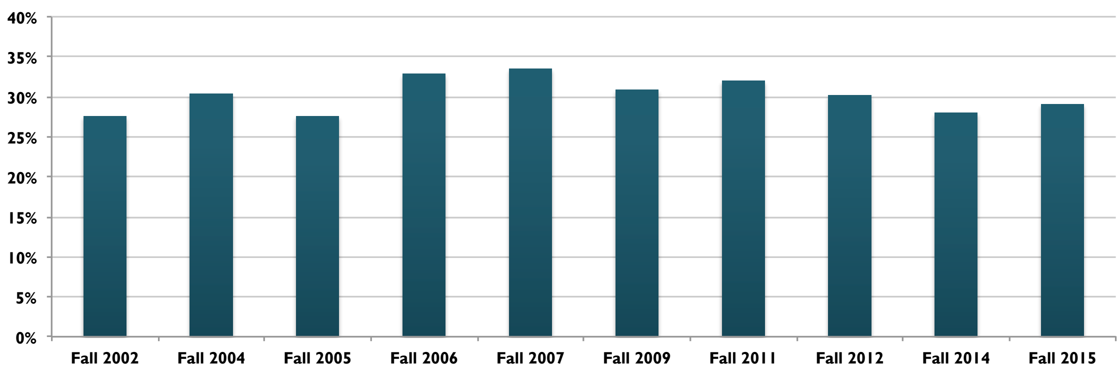
ONLINE EDUCATION IS SIGNIFICANTLY REPRESENTED IN MY INSTITUTION'S FORMAL STRATEGIC PLAN BY DISTANCE ENROLLMENTS – 2015



Faculty Acceptance of Online Education

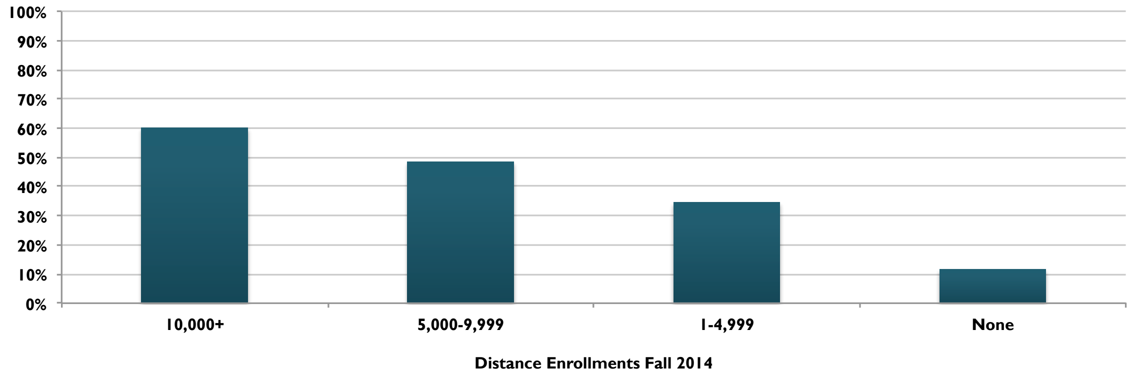
Even after a decade of substantial growth in the number of schools with distance offerings and the number of students taking these courses, the level of skepticism among faculty has remained very high. Only a small portion of all academic leaders report that their faculty "accept the value and legitimacy of online education." The trend over the past several years has been one of little change from year to year. A continuing failure of online education has been the inability to convince its most important audience – higher education faculty members – of its worth.

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – 2002 TO 2015



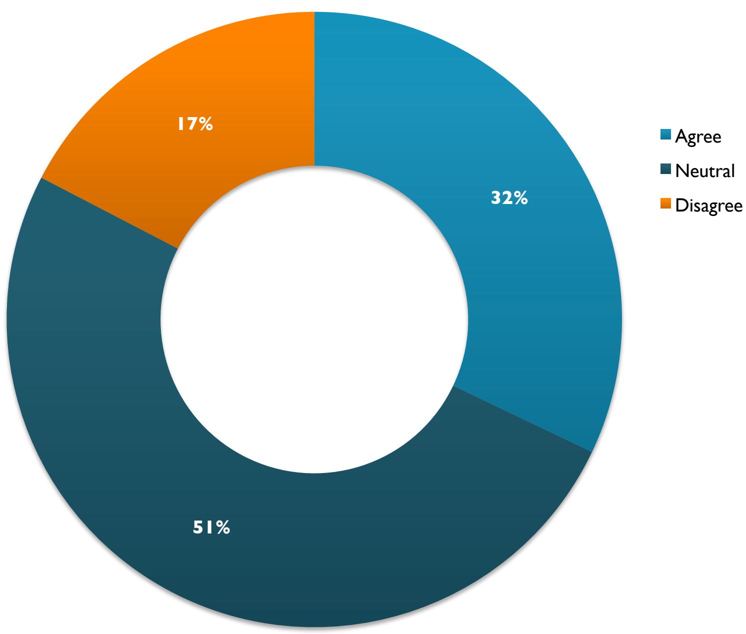
There is a strong relationship between the reported level of acceptance among faculty members and the number of distance education students at that institution, with faculty at institutions with larger numbers of distance students being more accepting. However, even among those institutions most deeply invested in distance education with over 10,000 such students enrolled, only 60.1% of their academic leaders can report that their faculty accept it. These percentages drop even further for schools with fewer students (48.5% among schools with between 5,000 and 10,000 distance enrollments, and only 34.6% of those with less than 5,000). The rate is even lower among institutions with no distance students, where only 11.6% report that their faculty accept the value and legitimacy of online education.

Faculty at My School Accept the Value and Legitimacy of Online Education by Distance Enrollments – 2015



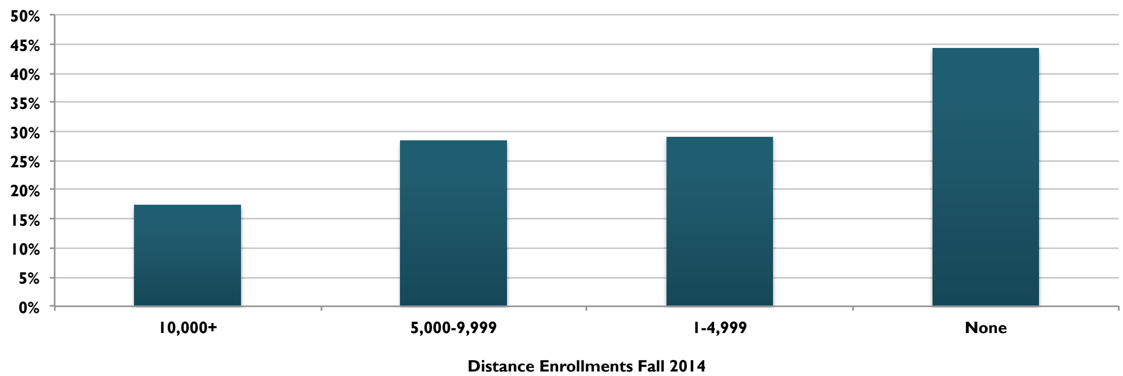
Given that distance education enrollments have continued to grow even in the face of a continued lack of faculty acceptance, one must ask how important faculty attitudes are to institutional leaders. When asked if these faculty attitudes presented a significant obstacle, one third of the institutional leaders agree that they did. Most leaders remain neutral, with only 17 percent reporting that faculty attitudes did not pose a significant obstacle.

Faculty Attitudes are a Significant Obstacle to Further Growth of Online Education - 2015



As might be expected, chief academic officers at the institutions with the largest distance enrollments had the least amount of concern with the potential impact of faculty attitudes. It is not clear if this is due to their faculty being more accepting (as we noted above) or because they have evolved better ways of recruiting the segments of their faculty that do embrace online learning.

FACULTY ATTITUDES ARE A SIGNIFICANT OBSTACLE TO FURTHER GROWTH OF ONLINE EDUCATION BY INSTITUTIONAL DISTANCE ENROLLMENTS – 2015



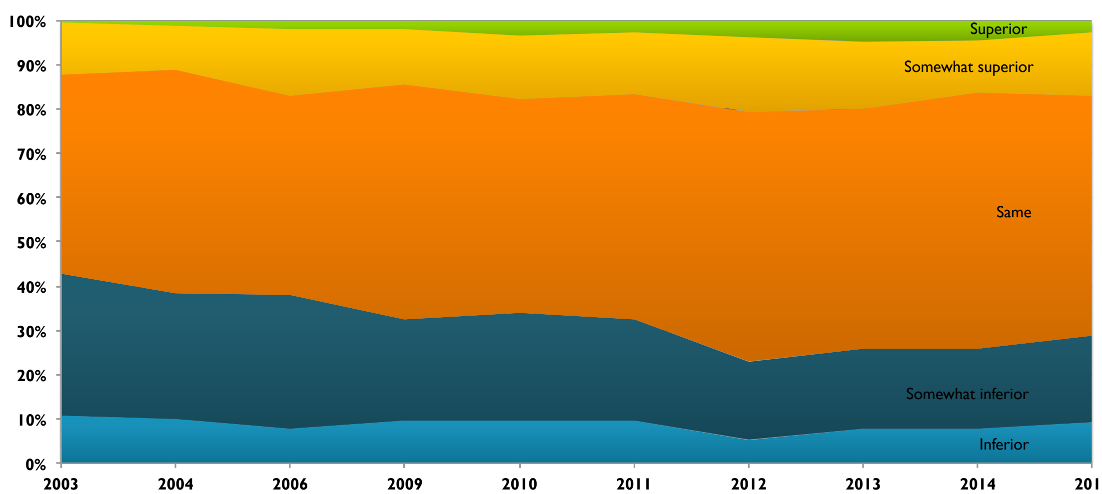
Are Learning Outcomes in Online Offerings Comparable to Face-to-Face?

It is always hard the judge the quality of something where there is no universally agreed upon metric. Such is the case for education – where there is no single measure of education quality – either for face-to-face or for distance education. This report series has examined the issue by asking academic leaders to rate the relative quality of the learning outcomes for online courses with those of comparable face-to-face courses.

As we have noted in previous reports, it is important to understand that chief academic officers are reporting their personal *perceptions* about the relative quality of online and face-to-face instruction. They may base their opinions on detailed metrics for courses at their own institutions or on far less rigorous factors, such as conversations with peers or what they have read in the press. These perceptions remain important, as these academic leaders are making critical decisions for their institutions.

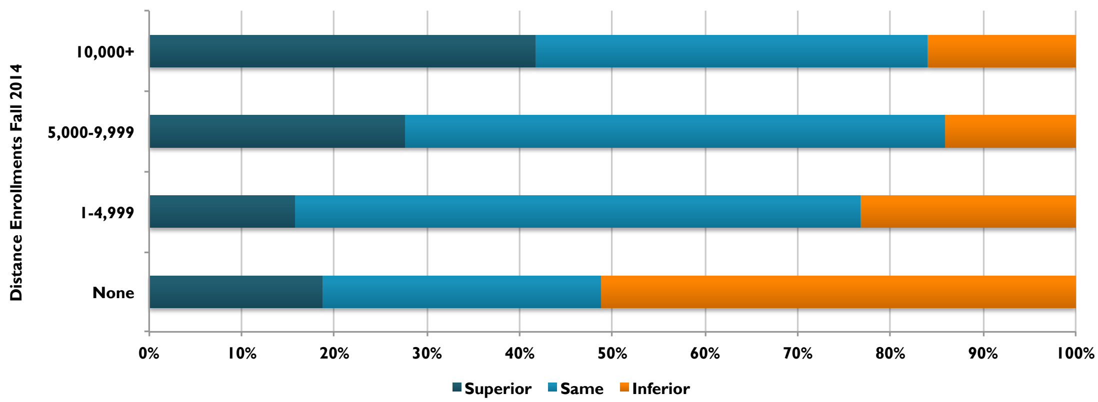
The proportion of academic leaders that rated online education as good as or better than face-to-face instruction was 57.2% in 2003. The relative view of online quality has improved over time, with a pattern of slow but steady improvement in the relative view of online learning outcomes from 2003 until 2012, where 77.0% of the respondents rated online as good or better. Results since then, however, have shown been less positive, with the results for 2015 showing only 71.4% rating online as good or better.

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE: 2003 - 2015



Academic leaders at institutions with online offerings have consistently held a more favorable opinion of the learning outcomes for online education than those at institutions with no offerings. The consistent finding over the thirteen years of these reports is also evident when we examine the differences between institutions with varying levels of engagement in distance education. Those few institutions with the largest distance enrollments (10,000 or more distance students in fall 2014) have the most positive view of the relative quality of online education, with 41.7% reporting it as superior to face-to-face instruction. A further 42.3% report the relative quality as the same, with only 16.0% saying they considered online to be inferior.

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE – 2015



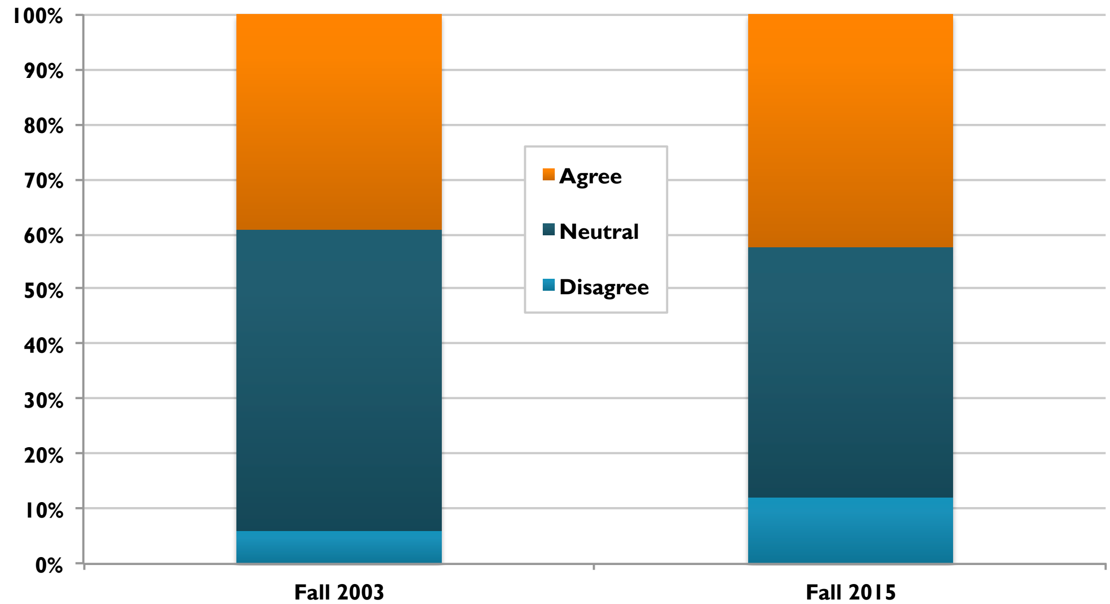
Academic leaders at institutions with smaller distance enrollments (5,000 to 9,999) are also mostly positive, with 27.7% saying it is superior and only 14.1% saying it is inferior. Chief academic officers at institutions with smaller distance enrollments (less than 5,000) are less positive, with a greater proportion reporting inferior (23.2%) than superior (15.8%). But even this group had a majority (61.0%) rating the two as the same.

The results from the academic leaders at schools with no distance education enrollments are far more negative, with a majority (51.2%) reporting the relative quality of online as inferior. This is the only group where less than a majority rate online as good as or better than face-to-face instruction.

Blended Learning

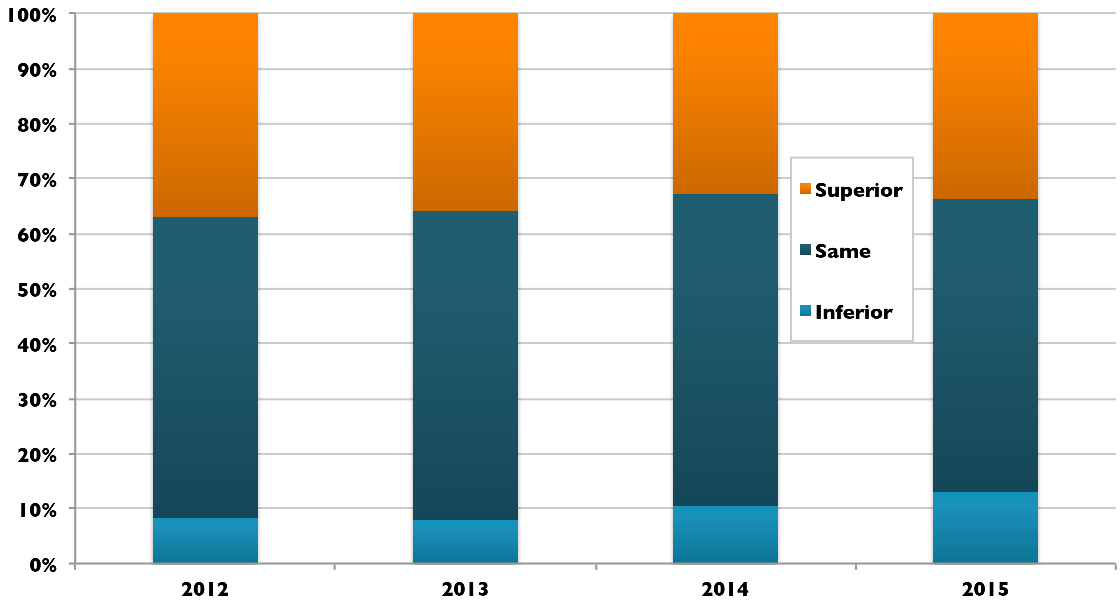
Chief academic officers may continue to have reservations about the relative quality of online learning, but they are a far more favorable about courses that combine elements of online instruction with those of traditional face-to-face teaching. Academic leaders consistently rate the promise of blended or hybrid courses as superior to that of fully online courses. There has been little change in this belief over time, with 42.3% of academic leaders now supporting this statement, up only slightly from 39.2% in 2003.

BLENDED COURSES HOLD MORE PROMISE THAN FULLY ONLINE COURSES: 2003 AND 2015



Even more impressive is that these same leaders rate the learning outcomes for blended instruction as superior to traditional face-to-face instruction. While the majority of academic leaders rate the outcomes of online and blended learning as the "Same" as face-to-face learning (ranging from 54.7% in 2012 to 56.6% in 2015), more consider blended learning outcomes to be superior to face-to-face instruction (35.6% this year) than inferior (13.9%).

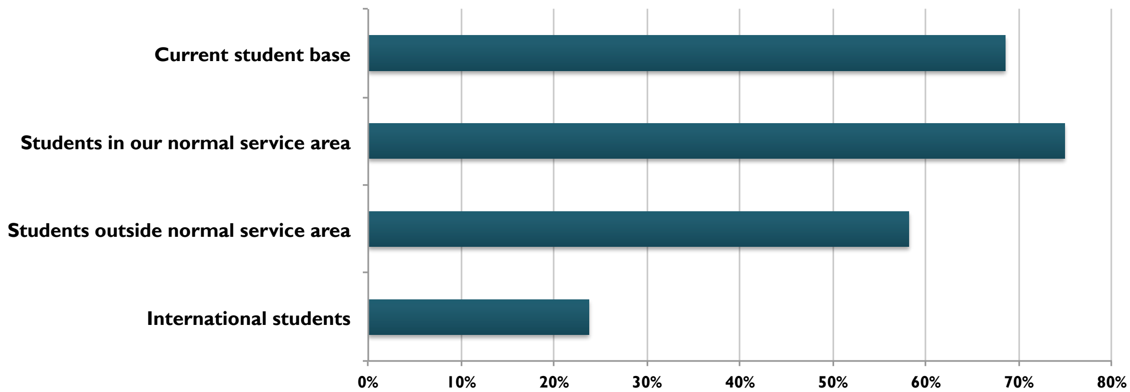
LEARNING OUTCOMES IN BLENDED/HYBRID COURSE COMPARED TO FACE-TO-FACE: 2012 - 2015



Geographic Reach

One of the advantages of distance education is that it removes distance as a barrier. An online student on the other side of the globe can have the same level of access and ability to participate as one in the next room. However, when chief academic officers were asked for whom they designed their distance offerings, three-quarters (74.9%) responded that students in their normal service area were a primary audience they had in mind. Nearly as many mentioned their currently enrolled student base (68.5%) as a primary target audience.

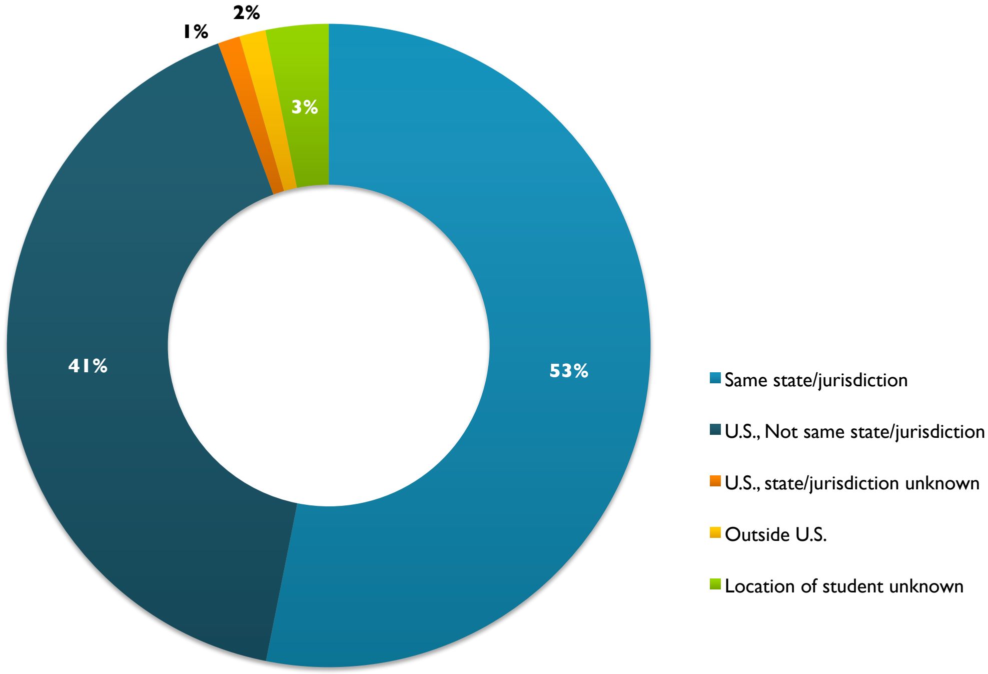
WHAT ARE THE PRIMARY AUDIENCES FOR WHOM DO YOU DEVELOP YOUR ONLINE OFFERINGS – 2015



While the main focus might be on current and potential students from the areas that the institution traditionally serves, expanding the institution's geographic reach is not being ignored. Over one-half (58.2%) of the academic leaders reported that students outside their normal service area were a primary audience considered in online course design. A smaller group (23.7%) listed international students as a specific target audience for their online courses and programs.

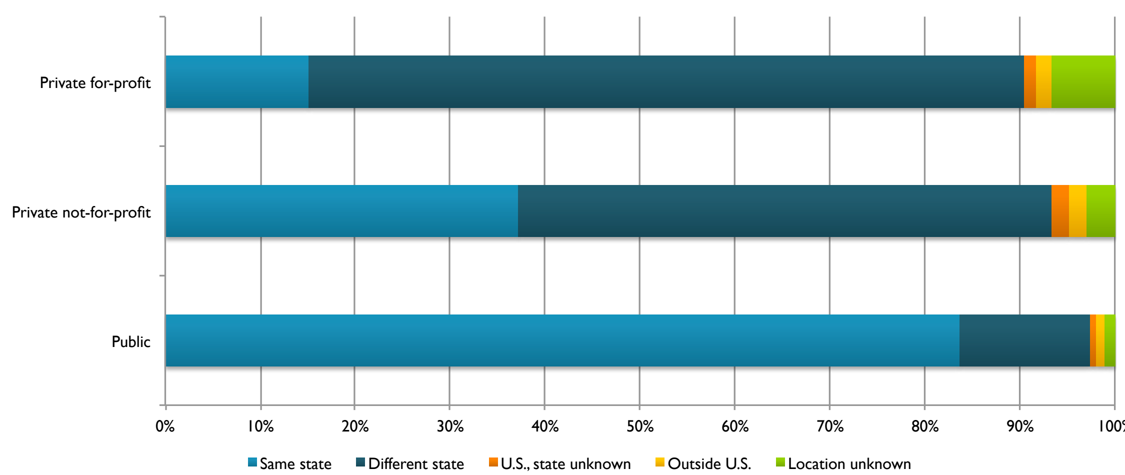
How well are institutions doing in expanding their geographic reach? The distance education enrollment data in the Integrated Postsecondary Education Data System includes the location of those students who are taking exclusively distance courses. As might be expected from the high rates at which chief academic officers mentioned designing courses for their current student base and for students in their normal service area, the majority of online students are located close (in the same state) to the institution they are attending.

Location of Students Enrolled Exclusively in Distance Education Courses - 2014



The distribution of student locations is very different among the different types of institutions. Public institutions, not unexpectedly, serve a local population, with 83.6% of their exclusively distance students located in the same state as the institution. The rates are much lower for private not-for-profit (37.1%) and even lower among private for-profit institutions (15.1%).

Location of Students Enrolled Exclusively in Distance Education Courses - 2014



Open Educational Resources

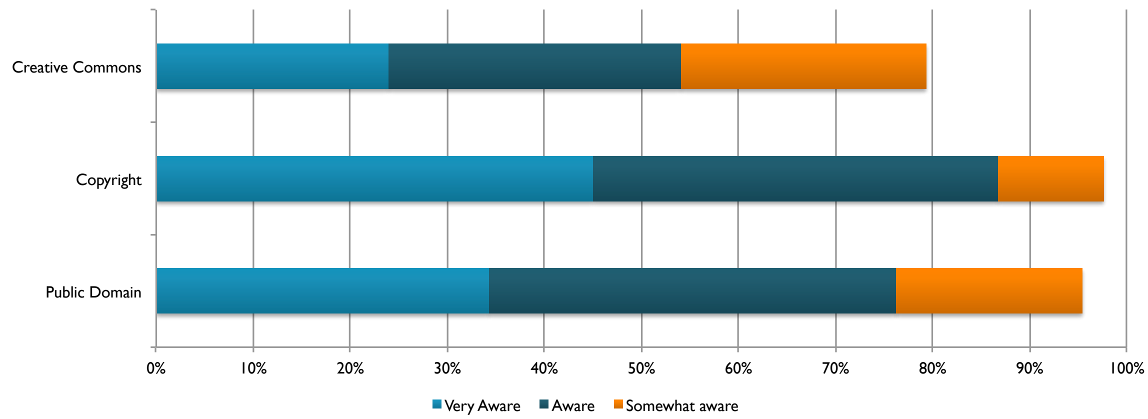
Working with The William and Flora Hewlett Foundation, the Babson Survey Research Group added Open Educational Resources (OER) as an area of study beginning with our 2009 survey. Results for 2009 and 2011 found most surveyed academic leaders believed that OER would add value for their campus. In 2011, nearly two-thirds of all chief academic officers agreed that open educational resources have the potential to reduce costs for their institution. There was also wide agreement among academic leaders that open educational resources will save time in the development of new courses.

Many leaders claiming to be aware of OER may have been confusing it with other concepts. In 2011 nearly all of these leaders reported that they were at least somewhat aware of open educational resources (OER). However, in examining open-ended responses it was clear that there was wide variability in what respondents considered to be open educational resources. The conclusion was that while most academic leaders were somewhat aware of OER, the level of understanding of the details was seriously lacking.

The availability of open licensing and the ability to reuse and remix content is central to concept of open educational resources, with a Creative Commons license being one of the most common. Almost all faculty surveyed in 2014 reported that they are aware of copyright licensing of classroom content and public domain licensing, but fell short on awareness of Creative Commons licensing. Less than two-thirds of faculty reported that they are at least somewhat aware of Creative Commons licensing.

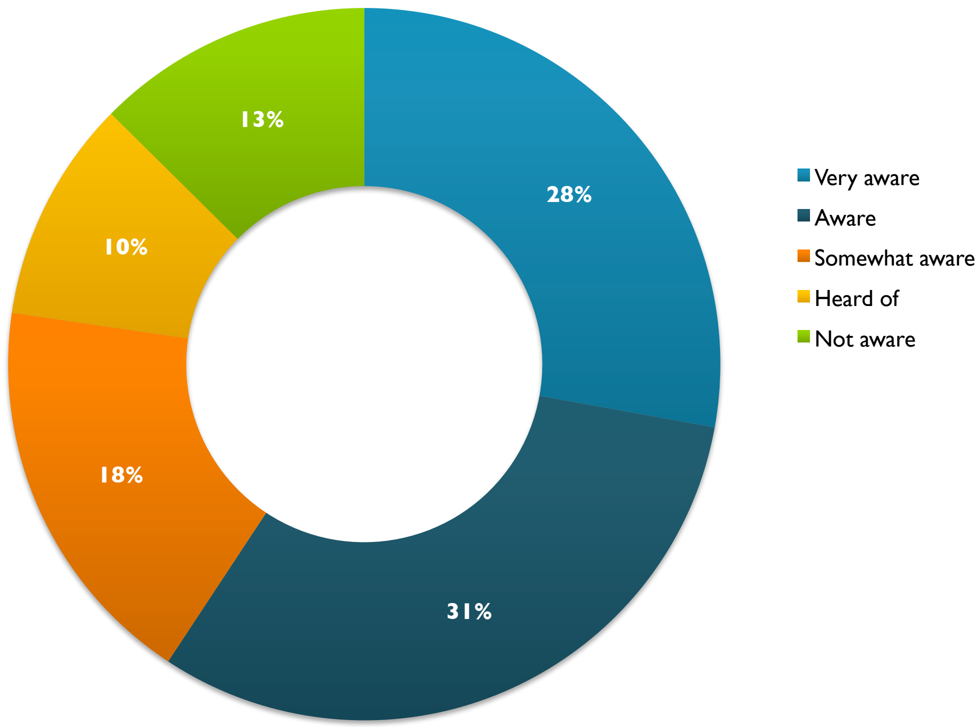
The level of awareness of this licensing mechanism is far higher among academic leaders than among faculty, with nearly all claiming some level of awareness. The most recent results mirror those of this same group for the previous year, with over 95% percent reporting that they are aware of both copyright and public domain licensing. Awareness drops somewhat for Creative Commons, but even here nearly 80% claim some level of awareness.

AWARENESS OF LICENSING - 2015



When these same academic leaders were asked about a specific type of open resource – open textbooks – their reported rates of awareness were also quite high. A majority reported that they were either "Aware" (28%) or "Very aware" (31%), with and additional 18% sating that they were "somewhat aware."

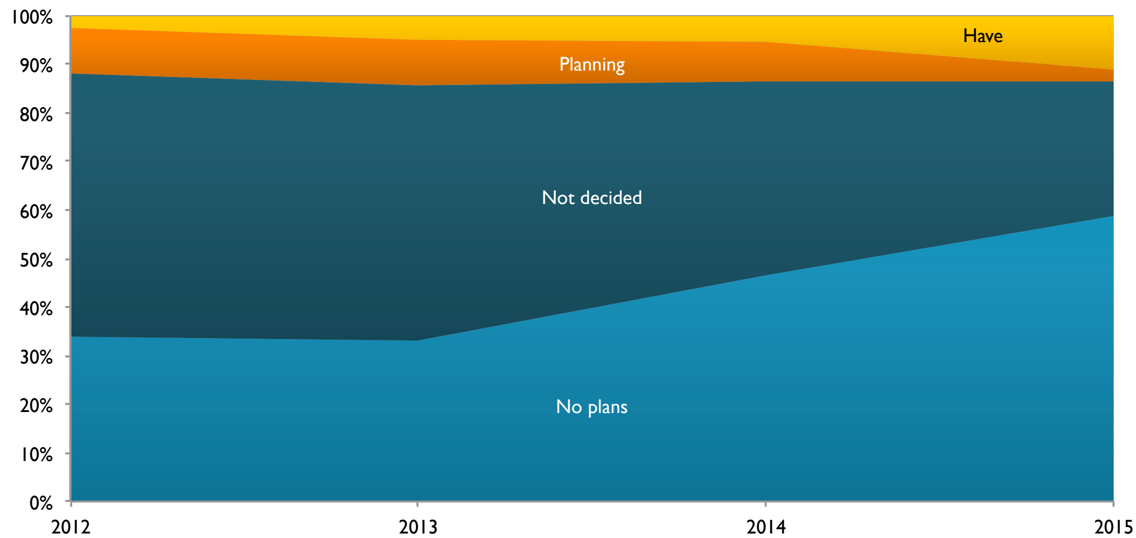
AWARENESS OF OPEN TEXTBOOKS - 2015



Massive Open Online Courses (MOOCS)

The number of institutions that report that they either have or are planning a Massive Open Online Course (MOOC) has remained relatively steady. In 2012 12.0% of institutions fell in this category (2.6% offering a MOOC, and 9.4% with plans to offer them). In 2013, the number increased to 14.3% (5.0% offering a MOOC and 9.3% planning). Results for 2014 saw this drop a bit to 13.6% (8.0% offering a MOOC and 5.6% planning). This year's results follow this same pattern; 11.3% reporting that they have a MOOC, and an additional 2.3% are planning one, for the same 13.6% total as last year.

ROLE OF MOOCS AT YOUR INSTITUTION - 2012 TO 2015



While the proportion of institutions that have or are planning MOOCs has remained stable, the remaining higher education institutions seem to be deciding against adding a MOOC. This may be because of their belief that MOOCs are not sustainable. We previously asked all institutions — those with MOOCS and those without — if they thought that MOOCs were a sustainable method for offering online courses. The number of institutions saying that they believed MOOCs to be sustainable fell from 28.3% in 2012 to only 16.3% in 2014.

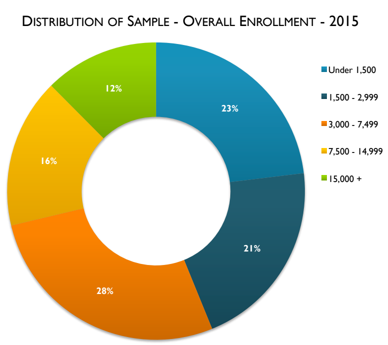
Only a small portion of higher education institutions are engaged with MOOCs, and adoption levels seem to be plateauing. The total number of institutions reporting a current or planned MOOC remained stable in 2015. While the fraction of institutions engaged in MOOCs may be relatively small, these does not mean that the number of students impacted is also small. With many MOOCs having enrollments in the thousands, or even higher, the number of students touched by a MOOC can easily match that of those taking distance education courses.

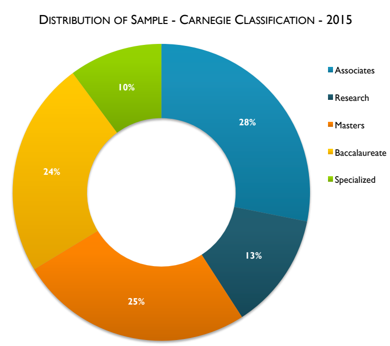
Survey Methodology

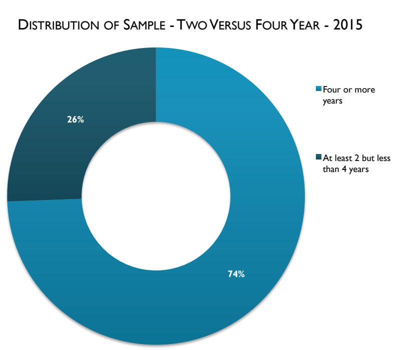
The sample for this analysis is comprised of all active, degree-granting institutions of higher education in the United States that are open to the public.

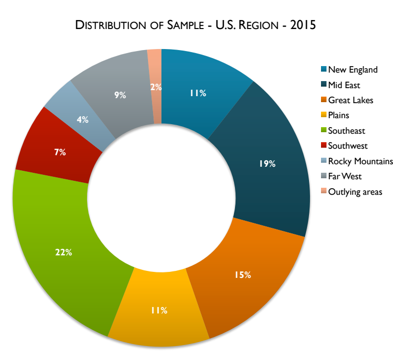
The data for this report uses information from the National Center for Educational Statistics' IPEDS database[5] and survey data collected by the Babson Survey Research Group. The most current IPEDS database was released in December 2015, but covers results for fall 2014. The Babson Survey Research Group was collected in December 2015 and refers to fall 2015. Data for prior years used for comparisons also includes data collected by the College Board[6]. The College Board included questions for this report series as part of its extensive data collection effort for its Annual Survey of Colleges.

All sample schools were sent an invitation email and reminders, inviting their participation and assuring them that no individual responses would be released. All survey respondents were promised they would be notified when the report was released, and would receive a copy.









5 http://nces.ed.gov/ipeds/datacenter/DataFiles.aspx

6 Portions of the data used for this report was collected by The College Board as part of the Annual Survey of Colleges and is Copyright © 2014-2015 The College Board.

Institutional descriptive data for the current year come from the National Center for Educational Statistics' IPEDS database[7]. Responses for prior years also include descriptive information from the College Board Annual Survey of Colleges. After the data was compiled and merged with the IPEDS database, responders and nonresponders were compared to create weights, if necessary, to ensure that the survey results reflected the characteristics of the entire population of schools. The responses are compared for 35 categories based on the 2010 Carnegie Classification of Institutions of Higher Education. These weights provide a small adjustment to the results, allowing for inferences to be made about the entire population of active, degree-granting institutions of higher education in the United States.

In December 2015, the U.S. Department of Education's National Center for Educational Statistics (NCES) released the third year of Integrated Postsecondary Education Data System (IPEDS) Fall Enrollment data that includes distance education enrollments. IPEDS is a national census of postsecondary institutions in the U.S., which represents the most comprehensive data available. Through the IPEDS Data Center, individuals can download data files for one or more institutions with information from any of the IPEDS components or download complete data files, produce reports, or create group statistics.

The focus of this report is the distance education data that has been collected by IPEDS for the fall 2012, fall 2013, and fall 2014 terms. IPEDS reporting includes a number of other variables that describe the size, sector, and focus of each institution of higher education. This data allows us to compare institutions using a consistent set of definitions provided by the IPEDS survey.

Transitioning to IPEDS Data

Moving from enrollment data collected by the Babson Survey Research Group (BSRG) to using data from the Integrated Postsecondary Education Data System (IPEDS) has a direct impact on three measures contained in previous years of these reports.

Offerings: IPEDS and BSRG results are both valid, and differ to the extent that the BSRG definition is more inclusive than the IPEDS definition.

The BSRG measure of "online offerings" was defined as broadly as possible – any offering of any length to any audience at any time. IPEDS takes a much narrower view. For example, IPEDS counts undergraduate offerings for "a student enrolled in a 4- or 5-year bachelor's degree program, an associate's degree program, or a vocational or technical program below the baccalaureate."[8] Non-credit courses,

[7] http://nces.ed.gov/ipeds/datacenter/DataFiles.aspx
[8] http://nces.ed.gov/ipeds/glossary/?charindex=D

continuing education courses, courses for alumni, and courses for students not registered for a degree program do not qualify for the IPEDS definition.

Enrollment numbers: The BSRG annual estimate of the number of students taking at least one online course was based on extrapolating self-reported online enrollment numbers from individual institutions to a national-level total. The data collection and estimation process remained consistent over time.

A detailed examination in last year's report concluded that the estimation technique was not been a cause of significant bias in the BSRG national estimates. However, bias in the reported enrollments in the BSRG survey *did* represent a potentially significant issue. Both BSRG and IPEDS count the number of unique students. This requires excellent data and good reporting systems to ensure that students enrolled in more than one qualifying course are counted only once. For whatever reason, it appears that many BSRG respondents did not correctly remove students enrolled in more than one qualifying course, and therefore provided numbers that were too high.

Changes over time: The factors producing an upward bias in the BSRG estimates come from institutions reporting inflated estimates where tracking systems are lacking and reporting overall enrollments instead of unique headcounts. Critically, these factors do not appear to have varied over time, therefore the pattern of responses (rates of growth, etc.) are much more robust than the actual point estimates of the number of students at any one point in time.

IPEDS Definitions

According to IPEDS, Distance Education is:

"Education that uses one or more technologies to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor synchronously or asynchronously.

Technologies used for instruction may include the following: Internet; one-way and two-way transmissions through open broadcasts, closed circuit, cable, microwave, broadband lines, fiber optics, satellite or wireless communication devices; audio conferencing; and video cassette, DVDs, and CD-ROMs, if the cassette, DVDs, and CD-ROMs are used in a course in conjunction with the technologies listed above."

IPEDS collects Distance Education enrollments in two categories (the first two listed below) and this Report adds a third:

- "Exclusively" Distance Education: All of the student's enrollments for the term were through Distance Education courses.

- "Some But Not All" Distance Education: The student enrolled in a mix of course modalities, including some Distance Education courses.

- "At Least One" Distance Education Course: A new data field created as the sum of the above two categories. This category matches the historical data reported by previous years of this report series. Prior to IPEDS reporting of Distance Education data starting with data from the fall of 2012, the BSRG survey was the *de facto* data available. Therefore, historic comparisons require this compiled category. e-Literate author and blogger Phil Hill is responsible for early analysis of the fall 2012 IPEDS data and collaboration with BSRG to ensure that the two data sets can be compared appropriately.

TABLES

Overall Higher Education Enrollment

OVERALL HIGHER EDUCATION ENROLLMENT: FALL 2014

	Number of Students	*Percentage*
Public	14,735,637	71.9%
Private Non-Profit	4,165,426	20.3%
Private For-Profit	1,605,749	7.8%
Total	20,506,812	100.0%

Enrollment of Students Taking Exclusively Distance Education Courses

ENROLLMENT OF STUDENTS TAKING EXCLUSIVELY DISTANCE EDUCATION COURSES: FALL 2014

	Number of Students	*Percentage*
Public	1,382,872	48.4%
Private Non-Profit	632,341	22.1%
Private For-Profit	843,579	29.5%
Total	2,858,792	100.0%

Enrollment of Students Taking Some of Their Courses at a Distance

ENROLLMENT OF STUDENTS TAKING SOME OF THEIR COURSES AT A DISTANCE

	Number of Students	*Percentage*
Public	2,524,030	85%
Private Non-Profit	328,410	11%
Private For-Profit	117,594	4%
Total	2,970,034	100.0%

Enrollment of Students Taking At Least One Course at a Distance

ENROLLMENT OF STUDENTS TAKING AT LEAST ONE COURSE AT A DISTANCE: FALL 2014

	All students enrolled	*Exclusively Distance Courses*	*Some Distance Courses*	*At Least One Distance Course*
Public	14,735,637	1,382,872	2,524,030	3,906,902
Private Non-Profit	4,165,426	632,341	328,410	960,751
Private For-Profit	1,605,749	843,579	117,594	961,173
Total	20,506,812	2,858,792	2,970,034	5,828,826

Enrollment of Students Taking At least One Course at a Distance: Fall 2014

	Exclusively Distance Courses	*Some Distance Courses*
Public	1,382,872	2,524,030
Private Non-Profit	632,341	328,410
Private For-Profit	843,579	117,594
Total	2,858,792	2,970,034

Changes in Distance Enrollments

Year-to-Year Change in Distance Enrollments - 2012-2014

	2013 - 2014	*2012 - 2013*
Public	147,169	161,242
Private not-for-profit	97,574	98,480
Private for-profit	-27,468	-73,577

Enrollment by Type of Course - Degree-Granting Institutions - 2012-2014

	2012	*2013*	*2014*
Exclusively in distance education courses	2,633,515	2,701,684	2,858,792
Some but not all distance education courses	2,791,891	2,909,867	2,970,034
Student not enrolled in any distance education courses	15,503,037	15,068,801	14,677,986

Location of Distance Education Students

Location of Students Enrolled Exclusively in Distance Education Courses - 2014

	Same state	*Different state*	*U.S., state unknown*	*Outside U.S.*	*Location unknown*
Public	1,156,420	189,753	9,344	12,294	15,061
Private not-for-profit	234,889	355,069	11,943	11,463	18,977
Private for-profit	127,443	635,513	10,395	14,031	56,197

Level of Distance Education Students

Type of Institution - Undergraduate Students Enrolled in Distance Education Courses - 2014

	Number of Students	Percentage
Public	3,532,884	72.7%
Private not-for-profit	609,111	12.5%
Private for-profit	720,524	14.8%
Total	4,862,519	100.0%

Type of Institution - Graduate Students Enrolled in Distance Education Courses - 2014

	Number of Students	Percentage
Public	374,018	38.7%
Private not-for-profit	351,640	36.4%
Private for-profit	240,649	24.9%
Total	966,307	100.0%

Concentration of Distance Enrollments

Fall 2014 Distance Enrollments by Size of Institution's Distance Enrollments

Size	*Distance Enrollments*	*Institutions*
10,000+	1,738,081	80
5,000 - 9,999	1,122,932	167
2,500 - 4,999	1,210,894	347
Under 2,500	1,757,249	2,730

Is Online Learning Strategic?

Online Education is Critical to the Long-term Strategy of my Institution – 2002 to 2015

	Fall 2002	*Fall 2003*	*Fall 2004*	*Fall 2005*	*Fall 2006*	*Fall 2007*	*Fall 2009*
Agree	48.8%	53.5%	56.0%	58.4%	59.1%	58.0%	59.2%
Neutral	38.1%	33.7%	30.9%	27.4%	27.4%	27.0%	25.9%
Disagree	13.1%	12.9%	13.1%	14.2%	13.5%	15.0%	14.9%

	Fall 2010	*Fall 2011*	*Fall 2012*	*Fall 2013*	*Fall 2014*	*Fall 2015*
Agree	63.1%	65.5%	69.1%	65.9%	70.8%	63.3%
Neutral	24.6%	21.0%	19.7%	24.3%	20.6%	22.9%
Disagree	12.3%	13.5%	11.2%	9.7%	8.6%	13.7%

Online Education is Critical to the Long-term Strategy by Overall Enrollment - 2014 and 2015

	15,000 +	*7,500 - 14,999*	*3,000 - 7,499*	*1,500 - 2,999*	*Under 1,500*
2014	71.0%	79.5%	69.4%	63.9%	70.2%
2015	75.8%	79.5%	77.5%	62.8%	46.0%

Online Education is Critical to the Long-term Strategy by Distance Offerings - 2014 and 2015

	Have Distance Offerings		No Distance Offerings	
	2014	*2015*	*2014*	*2015*
Agree	77.2%	77.1%	33.8%	19.5%
Neutral	16.8%	19.0%	42.5%	37.8%
Disagree	6.1%	3.9%	23.7%	42.7%

Online Education is Critical to the Long-term Strategy by Institutional Control – 2006 to 2014

	Public	*Private nonprofit*	*Private for-profit*
Fall 2006	74.1%	48.6%	49.5%
Fall 2007	70.7%	47.1%	53.2%
Fall 2009	73.6%	49.5%	50.7%
Fall 2010	74.9%	52.3%	60.5%
Fall 2011	77.0%	54.2%	69.1%
Fall 2012	77.3%	65.1%	61.3%
Fall 2013	73.6%	63.8%	54.9%
Fall 2014	72.9%	64.5%	80.9%
Fall 2015	73.0%	58.4%	49.8%

Online Education is Critical to the Long-term Strategy by Distance Enrollments – 2015

	10,000+	*5,000-9,999*	*1-4,999*	*None*
Percent Agreeing	90.3%	84.3%	76.3%	19.5%

Online Education is Significantly Represented in my Institution's Formal Strategic Plan – 2013-2015

2013	*2014*	*2015*
42.5%	45.1%	41.3%

Online Education is Significantly Represented in my Institution's Formal Strategic Plan by Distance Enrollments – 2015

	10,000+	*5,000-9,999*	*1-4,999*	*None*
Percent Agreeing	100.0%	45.1%	43.4%	17.4%

Faculty Acceptance of Online Education

Faculty at My School Accept the Value and Legitimacy of Online Education – 2002 to 2015

	Fall 2002	*Fall 2004*	*Fall 2005*	*Fall 2006*	*Fall 2007*
Agree	27.6%	30.4%	27.6%	32.9%	33.5%
Neutral	65.1%	59.3%	57.8%	56.1%	51.9%
Disagree	7.4%	10.3%	14.7%	11.0%	14.6%

	Fall 2009	*Fall 2011*	*Fall 2012*	*Fall 2014*	*Fall 2015*
Agree	30.9%	32.0%	30.2%	28.0%	29.1%
Neutral	51.8%	56.5%	57.2%	58.2%	56.5%
Disagree	17.3%	11.4%	12.6%	13.8%	14.4%

Faculty at My School Accept the Value and Legitimacy of Online Education by Distance Enrollments – 2015

	10,000+	*5,000-9,999*	*1-4,999*	*None*
Percent Agreeing	60.1%	48.5%	34.6%	11.6%

Faculty Attitudes are a Significant Obstacle to Further Growth of Online Education - 2015

Agree	32.1%
Neutral	50.5%
Disagree	17.4%

Faculty Attitudes are a Significant Obstacle to Further Growth of Online Education by Institutional Distance Enrollments – 2015

	10,000+	*5,000-9,999*	*1-4,999*	*None*
Agree	17.4%	28.5%	29.1%	44.3%
Neutral	50.5%	45.0%	59.1%	28.5%
Disagree	32.1%	26.6%	11.9%	27.2%

Are Learning Outcomes in Online Offerings Comparable to Face-to-Face?

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE: 2003 - 2015

	2003	*2004*	*2006*	*2009*	*2010*
Superior	0.6%	1.0%	1.8%	2.1%	3.4%
Somewhat superior	11.7%	10.0%	15.1%	12.4%	14.2%
Same	44.9%	50.6%	45.0%	53.0%	48.4%
Somewhat inferior	32.1%	28.4%	30.3%	23.0%	24.3%
Inferior	10.7%	10.1%	7.8%	9.5%	9.8%
	2011	*2012*	*2013*	*2014*	*2015*
Superior	2.7%	3.7%	4.7%	4.5%	2.7%
Somewhat superior	13.8%	16.8%	15.3%	11.7%	14.2%
Same	51.1%	56.4%	54.1%	57.9%	54.4%
Somewhat inferior	22.7%	17.7%	18.2%	18.1%	19.3%
Inferior	9.7%	5.3%	7.7%	7.8%	9.3%

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE BY INSTITUTIONAL DISTANCE ENROLLMENTS – 2015

	10,000+	*5,000-9,999*	*1-4,999*	*None*
Superior to face-to-face	21.8%	0.0%	2.9%	1.1%
Somewhat superior to face-to-face	19.9%	27.7%	12.9%	17.7%
Same as face-to-face	42.3%	58.2%	61.0%	30.1%
Somewhat inferior to face-to-face	16.0%	14.1%	20.6%	21.2%
Inferior to face-to-face	0.0%	0.0%	2.6%	30.0%

Blended Learning

BLENDED COURSES HOLD MORE PROMISE THAN FULLY ONLINE COURSES: 2003, 2004 AND 2015

	Fall 2003	*Fall 2015*
Disagree	6.1%	12.1%
Neutral	54.7%	45.6%
Agree	39.2%	42.3%

LEARNING OUTCOMES IN BLENDED/HYBRID COURSE COMPARED TO FACE-TO-FACE: 2012 - 2015

	2012	*2013*	*2014*	*2015*
Inferior	8.4%	7.9%	10.6%	13.9%
Same	54.7%	56.2%	56.6%	50.5%
Superior	36.9%	35.9%	32.8%	35.6%

Geographic Reach

What are the Primary Audiences For Whom do You Develop Your Online Offerings- 2015

Current student base	68.5%
Students in our normal service area	74.9%
Students outside normal service area	58.2%
International students	23.7%

Location of Students Enrolled Exclusively in Distance Education Courses - 2014

	Same state/jurisdiction	*U.S., Not same state/jurisdiction*	*U.S., state/jurisdiction unknown*	*Outside U.S.*	*Location unknown*
Number	1,518,752	1,180,335	31,682	37,788	90,235
Percent	53.1%	41.3%	1.1%	1.3%	3.2%

Location of Students Enrolled Exclusively in Distance Education Courses by Institutional Control - 2014

	Same state	*Different state*	*U.S., state unknown*	*Outside U.S.*	*Location unknown*
Public	1,156,420	189,753	9,344	12,294	15,061
Private not-for-profit	234,889	355,069	11,943	11,463	18,977
Private for-profit	127,443	635,513	10,395	14,031	56,197

Open Educational Resources

Awareness of Licensing - 2015

	Very Aware	*Aware*	*Somewhat aware*	*Unaware*
Public Domain	34.3%	41.9%	19.1%	4.6%
Copyright	45.0%	41.7%	10.9%	2.4%
Creative Commons	24.0%	30.1%	25.3%	20.7%

Awareness of Open Textbooks - 2015

Very aware	27.8%
Aware	31.4%
Somewhat aware	18.0%
Heard of	10.1%
Not aware	12.6%

Massive Open Online Courses (MOOCS)

ROLE OF MOOCS AT YOUR INSTITUTION - 2012 TO 2015

	2012	*2013*	*2014*	*2015*
No plans	33.7%	33.0%	46.5%	58.7%
Not decided	54.2%	52.7%	39.9%	27.8%
Planning	9.4%	9.3%	5.6%	2.3%
Have	2.6%	5.0%	8.0%	11.3%

Sample

DISTRIBUTION OF SAMPLE - OVERALL ENROLLMENT - 2015

Under 1,500	23.1%
1,500 - 2,999	20.8%
3,000 - 7,499	27.4%
7,500 - 14,999	16.3%
15,000 +	12.4%

DISTRIBUTION OF SAMPLE - CARNEGIE CLASSIFICATION - 2015

Associates	28.1%
Research	12.7%
Masters	25.4%
Baccalaureate	23.5%
Specialized	10.2%

DISTRIBUTION OF SAMPLE - TWO VERSUS FOUR YEAR - 2015

Four or more years	74.4%
At least 2 but less than 4 years	25.6%

DISTRIBUTION OF SAMPLE - U.S. REGION - 2015

New England (CT ME MA NH RI VT)	10.6%
Mid East (DE DC MD NJ NY PA)	18.5%
Great Lakes (IL IN MI OH WI)	15.5%
Plains (IA KS MN MO NE ND SD)	11.1%
Southeast (AL AR FL GA KY LA MS NC SC TN VA WV)	22.1%
Southwest (AZ NM OK TX)	7.4%
Rocky Mountains (CO ID MT UT WY)	4.0%
Far West (AK CA HI NV OR WA)	9.0%
Outlying areas (AS FM GU MH MP PR PW VI)	1.5%

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National Surveys of Online Education

- Grade Level: Tracking Online Education in the United States
- Grade Change: Tracking Online Education in the United States
- Changing Course: Ten Years of Tracking Online Education in the United States
- Going the Distance: Online Education in the United States, 2011
- Online Learning Trends in Private-Sector Colleges and Universities, 2011
- Class Differences: Online Education in the United States, 2010
- Learning on Demand: Online Education in the United States, 2009
- Staying the Course: Online Education in the United States, 2008
- Online Nation: Five Years of Growth in Online Learning
- Making the Grade: Online Education in the United States, 2006
- Growing by Degrees: Online Education in the United States, 2005
- Entering the Mainstream: The Quality and Extent of Online Education in the United States, 2003 and 2004
- Sizing the Opportunity: The Quality and Extent of Online Education in the United States, 2002 and 2003

K-12 Online and Blended Learning

- Class Connections: High School Reform and the Role of Online Learning
- K–12 Online Learning: A 2008 follow-up of the Survey of U.S. School District Administrators
- K–12 Online Learning: A Survey of U.S. School District Administrators

Open Educational Resources

- Opening Public Institutions: OER in North Dakota and the Nation, 2015
- Opening the Curriculum: Open Educational Resources in U.S. Higher Education, 2014
- Growing the Curriculum: Open Educational Resources in U.S. Higher Education, 2012

Higher Education Faculty

- Social Media for Teaching and Learning 2013
- Blogs, Wikis, Podcasts and Facebook: How Today's Higher Education Faculty Use Social Media, 2012
- Digital Faculty, Professors, Teaching and Technology, 2012
- Conflicted: Faculty and Online Education, 2012
- Teaching, Learning, and Sharing: How Today's Higher Education Faculty Use Social Media

Digital Courseware

- Time for Class: Lessons for the Future of Digital Courseware in Higher Education (Published by Tyton Partners)

http://www.onlinelearningsurvey.com/

Online Report Card - Tracking Online Education in the United States is the thirteenth annual report on the state of online learning in U.S. higher education. The survey is designed, administered and analyzed by the Babson Survey Research Group, with additional data from the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS). This study is aimed at answering fundamental questions about the nature and extent of online education.

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- Changes in Distance Enrollments
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