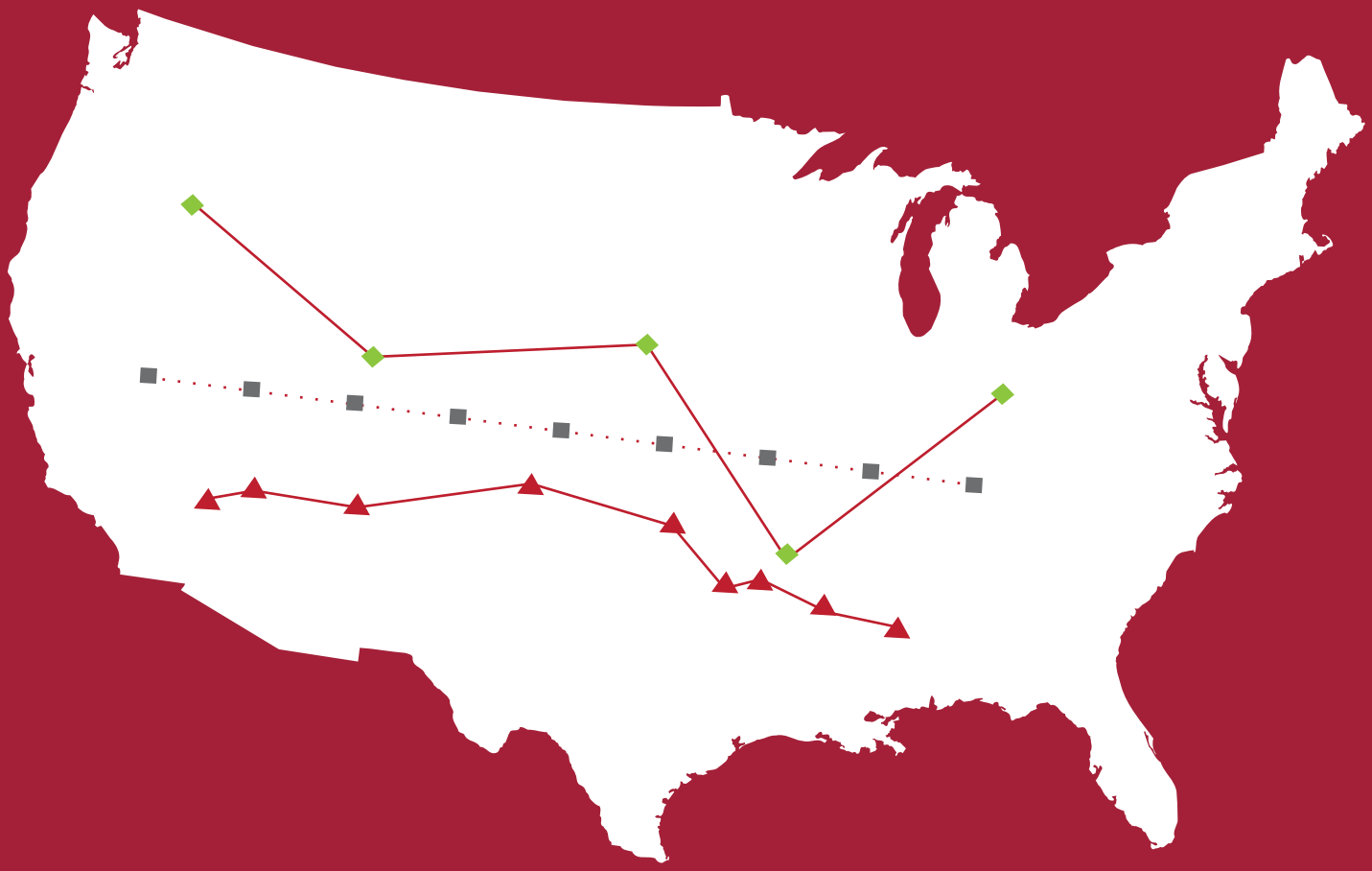
Grade Level:

Tracking Online Education in the United States

I. Elaine Allen and Jeff Seaman



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GRADE LEVEL

TRACKING ONLINE EDUCATION IN THE UNITED STATES

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With

COMMENTARY: IPEDS AS THE NEW DATA SOURCE

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February 2015

Cover design by Mark Favazza (www.favazza.com).

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Grade Level - Tracking Online Education in the United States is the twelfth annual report documenting online education in the United States. The Alfred P. Sloan Foundation originally supported the series. The Foundation saw the need for these reports and 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, and Pearson, for supporting our research and committing to the same degree of independence and autonomy.

- The Online Learning Consortium (formerly the Sloan Consortium) has been a valuable partner since the beginning. They have provided guidance, advice, and act as the distribution point for the reports.
- Pearson stepped in when the Sloan Foundation program ended. In addition to supporting the same "hands off" approach as the Foundation and providing production support, they have provided critical guidance on emerging trends in higher education.
- A number of joint Tyton Partners and Babson Survey Research Group higher education research projects have have positively impacted the design of this report.

We also want to thank the College Board, who in 2006 agreed to include our online enrollment questions in their Annual Survey of Colleges.

We are especially pleased that Phil Hill and Russ Poulin have contributed their analysis of the transition issues of moving to IPEDS data. Their clear and insightful description will be of value for all who track distance education.

We thank Dr. Barbara Illowsky, Professor of Mathematics & Statistics at DeAnza College, who suggested several important topics for this year's survey.

This report was edited and reviewed by Nate Ralph and we thank him for his suggestions, corrections, and careful attention to detail. The very talented Mark Favazza has provided cover designs for all the reports in this series.

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.

Co-Directors, Babson Survey Research Group, February 2015

PARTNERS

Pearson

Pearson has brought a wide array of experience in higher education to this project and will be producing an infographic highlighting the results.

Pearson is the world's leading learning company, with 40,000 employees in more than 80 countries working to help people of all ages to make measurable progress in their lives through learning. For more information about Pearson, visit http://www.pearson.com.

Online Learning Consortium

The Online Learning Consortium (Sloan-C) has been the long-time supporter and distributor of the national online learning reports in this series for the past eleven years.

The Online Learning Consortium (OLC) is the leading professional organization devoted to advancing quality online learning by providing professional development, instruction, best practice publications and guidance to educators, online learning professionals and organizations around the world. Visit http://onlinelearningconsortium.org/ for more information.

Tyton Partners

Tyton Partners' research efforts in digital courseware, adult education, student services, and student advising have informed the scope and coverage of this report.

Tyton Partners, formerly Education Growth Advisors, provides investment banking and strategy consulting services to companies, organizations, and investors as they navigate the complexities of the global knowledge sector. For more information about Tyton Partners visit www.tytonpartners.com or follow us @tytonpartners.

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FOREWORD

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. A long time in the making, we now have the promise of regular, comprehensive information on the extent and role of online and distance education that will be available for all. This series of reports is transitioning from collecting our own enrollment numbers to using those provided by IPEDS.

It is a sad commentary on the official understanding of the importance of online and distance education that the report series you are currently reading has been its only national chronicler for over a decade. The initial intention was never to become the *de facto* barometer of online learning, but rather to provide a single snapshot. It was only after the broad reception for the initial study, and the overwhelming demand for a follow-up, did the Alfred P. Sloan Foundation and the authors decide that further efforts were warranted.

With the release of that initial report in 2003, the authors' and the Sloan Foundation's first stop was the US Department of Education, to demonstrate the importance of online courses for US higher education, and plead with the Department to add online offerings to the IPEDS data collection process. Now, over a decade later, this is happening. We could not be happier.

IPEDS data has significant advantages over the processes that we have employed over the past decade, chief among them its official status. All institutions that participate in federal higher programs have data-reporting requirements, so IPEDS data coverage is universal. Because it is universal, all institutions need to implement internal systems to collect the information that IPEDS requires.

Data collection by the Babson Survey Research Group has had another constraint as well: the individual-level data could not be made public. In order to get reliable responses and to meet IRB requirements, all respondents are promised that their individual responses would never be shared. We could not expect a chief academic officer to provide unbiased responses about the quality of their own institution's offerings if these would be published for all to see.

The move to IPEDS data is not without its problems. IPEDS uses somewhat different definitions, so while the data are very close in what they measure, it is not an exact match. Phil Hill and Russ Poulin discuss IPEDS data issues in in a separate commentary section of this report.

EXECUTIVE SUMMARY

Grade Level - Tracking Online Education in the United States is the twelfth 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 data collection conducted in partnership with the College Board and additional data from the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS). Using survey responses from more than 2,800 colleges and universities and IPEDS data for 4,891, this study is aimed at answering fundamental questions about the nature and extent of online education.

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.*

The evidence: The proportion of academic leaders who report that online learning is critical to their institution's long term strategy has grown from 48.8% in 2002 to 70.8% this year.

- The proportion of chief academic leaders that say online learning is critical to their long-term strategy is at an all-time high.
- For-profit institutions account for the change for 2014; for the first time ever they are reporting a higher rate than public institutions.
- The proportion of institutions reporting online education is not critical to their long-term strategy has dropped to a new low of 8.6%.

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

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, the pattern reversed itself last year.*

The evidence: The 2014 results show no change in the percentage of academic leaders who view the learning outcomes for online instruction as the same as 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 grew from 57.2% in 2003 to 77.0% in 2012. The upward trend reversed in 2013, with a dip to 74.1%, a rate that has remained constant for 2014.
- The proportion of academic leaders who believe the learning outcomes for online education are inferior to those of face-to-face instruction remained the same as last year at 25.9%.
- Fewer leaders rate the learning outcomes in online courses as "superior" or "somewhat superior" to face-to-face (20.0% to 16.3%), but greater numbers rate them as the "same" (54.1% to 57.9%).
- Academic leaders are far more positive about the learning outcomes for blended instruction than they are for online.

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

Background: *This report series has used its own data to chronicle the continued increases in the number of students taking at least one online course. Online enrollments have increased at rates far in excess of those of overall higher education. The pattern, however, has been one of decreasing growth rates over time. This year marks the first use of IPEDS data to examine this trend.*

The evidence: The first two years of IPEDS data on the number of students taking at least one distance education course has produced the lowest recorded growth rate.

- The observed growth rate from IPEDS of the number of students taking at least one distance course was 3.7%, lower than previous online growth rates but still higher than the increase in overall higher education enrollments.
- The rate of growth in distance enrollments was very uneven; for-profit four-year institutions recorded the first-ever drop (down 66,600, or 8.7%).
- The two classes of institutions showing the greatest growth are public four-year institutions (increased by 126,824 or 7.2%) and private non-profit four-year institutions (up by 86,811 or 12.7%).

Barriers

Background: *While the number of students taking distance courses has grown by the millions over the past decade, it has not come without considerable concerns. Faculty acceptance has lagged, concerns about student retention linger, and leaders continue to worry that online courses require more faculty effort than face-to-face instruction.*

The evidence: Chief academic officers report no major improvements for any of these areas of concern.

- Only 28.0% of chief academic officers say that their faculty members accept the "value and legitimacy of online education," a rate substantially the same as it was in 2003.
- Most academic leaders (68.3%) continue to believe that "Students need more discipline to succeed in an online course than in a face-to-face course."
- Increasing numbers of academic leaders think that retaining students is a greater problem for online courses than for face-to-face courses (44.6% in 2014 versus 40.6% in 2013, 28.4% in 2009, and 27.2% in 2004).
- Additional effort required to deliver an online course represents a barrier for online instruction for 78.0% of academic leaders.

Massive Open Online Courses (MOOCs)

Background: *The 2012 and 2013 reports noted that only a small number of institutions either had or were planning a Massive Open Online Course (MOOC).*

The evidence: The results for 2014 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, and to 8.0% this year.
- Many institutions (39.9%) report they are still undecided about MOOCs, while single largest group (46.5%) say they have no plans for a MOOC.
- Only 16.3% of academic leaders believe that MOOCs represent a sustainable method of offering online courses, down from 28.3% in 2012.
- Decreasing numbers of leaders see MOOCs as a way for institutions to learn about online pedagogy: 27.9% this year, down from 49.8% and 44.0% for the last two years.

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 the course content delivered online.

The definition of an online course has remained consistent for the twelve 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 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 follows "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."[1]

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."[2] 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.

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

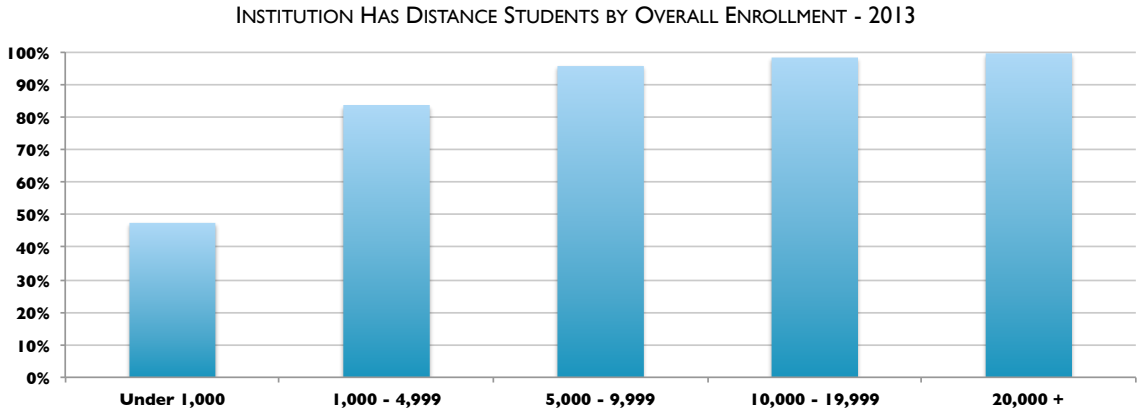
RESULTS

Who Offers Online (Distance) Courses?

The two most fundamental questions that this series of reports was initially designed to address were "what institutions offer online courses?" and "how many students are taking them?"

Recently the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS)[3] added "distance" education to the wealth of other data that they collect and report on US higher education institutions. The IPEDS data has several very important advantages over Babson Survey Research Group (BSRG) data collection, chief among them that the results are not based on a survey sample, but represent the full universe of all higher educational institutions. (See Transitioning to IPEDS Data for a more detailed discussion of the advantages and problems.)

Understanding how the new IPEDS-derived numbers compare with BSRG time series requires that data be collected from both sources and compared. This year BSRG has continued to collect full information from all higher education institutions on the status of their online offerings, as well as collecting online enrollment data from a sufficiently large sample (600+) institutions to allow the results from the IPEDS data to be compared with estimates using previous data and methods.

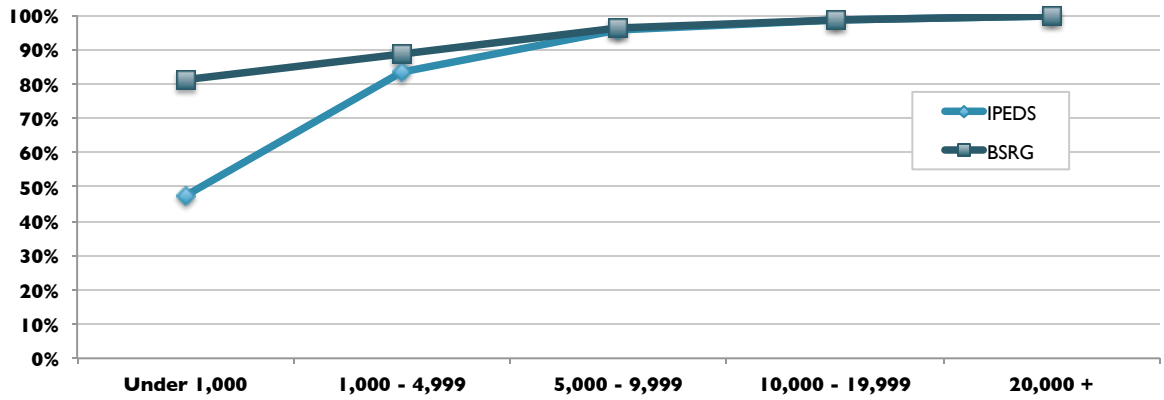


The most recent IPEDS data show that 70.7% of all currently active, degree-granting institutions that are open to the public have some distance offerings. There is a strong relationship between the size of the institution (as measured by the total number of students enrolled) and the proportion with distance offerings. Over 95% of institutions with 5,000 of more total students reported distance offerings. This drops to 83.6% for institutions with between 1,000 and 4,999 students, and down to 47.5% of those with less than 1,000 total students.

[3] http://nces.ed.gov/ipeds/datacenter/

This IPEDS pattern of distance offerings by size of school is almost an exact match to the BSRG data for the three largest categories of institutions, and a very close match for the second-to-smallest group. There is, however, a striking difference in the results for the very smallest (under 1,000 total students) institutions. The BSRG data shows 725 more institutions have distance offerings than the IPEDS data — nearly twice as many. What explains this difference?

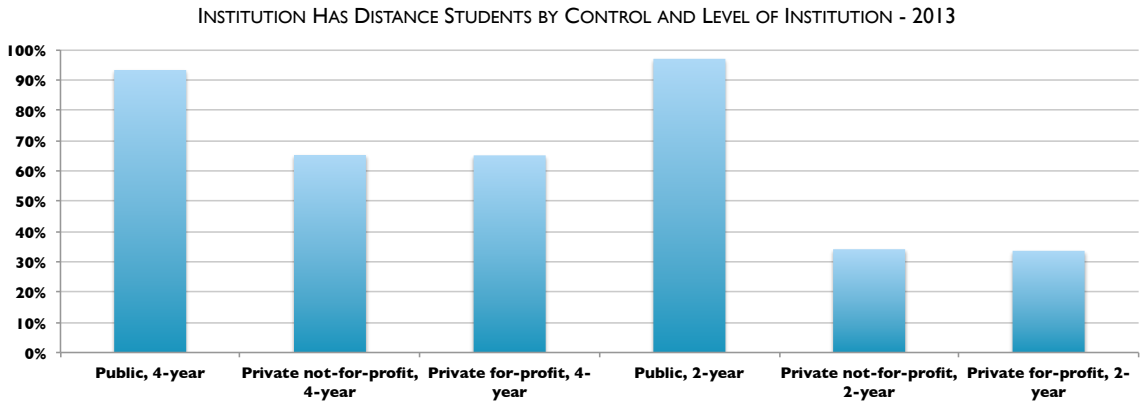
INSTITUTION HAS DISTANCE STUDENTS BY OVERALL ENROLLMENT IPEDS AND BSRG - 2013



The explanation lies in the definitions used by each survey. The IPEDS definition of having a distance course is stricter than the definition that the Babson Survey Research Group has been using for the past twelve years. The BSRG definition counts *any* offering, not only those in degree programs, and shows that many of the smaller institutions have online offerings, but that these offerings are not for credit and/or outside of their normal degree programs.

The 725 institutions not included in the IPEDS classification are among the very smallest of all higher education institutions with total enrollments averaging less than 400 students. These institutions represent a substantial fraction of higher education institutions (14.8%) but only a very small portion of overall enrollments (1.4%). They are composed of about 60% private, not-for-profit specialized institutions, and about 40% private for-profit associates institutions. The number of non-credit online students that they represent typically ranges from single digits to a few dozen.

According to IPEDS results, both four- and two-year public institutions offer distance courses at very high rates. Among the private not-for-profit and the private, for-profit institutions it is the four-year schools that have the greatest likelihood of having distance offerings; approximately two-thirds of these schools have offerings. Only about one-third of two-year private institutions have distance offerings.

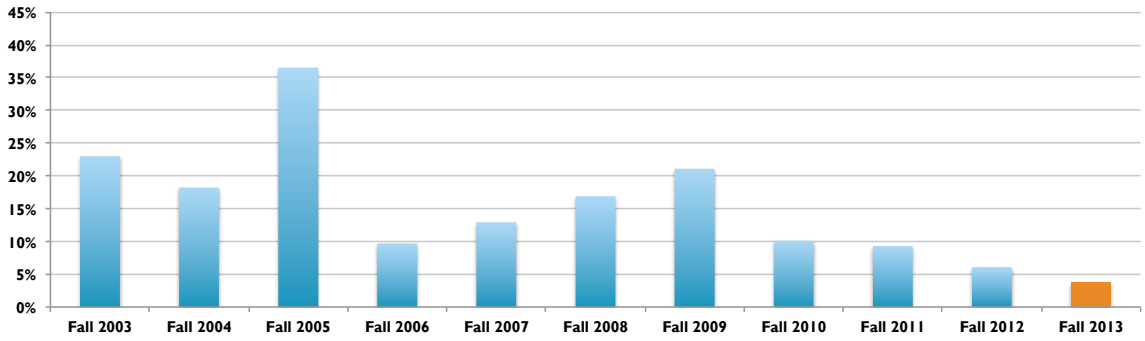


How Many Students are Learning Online (at a Distance)?

Every year since 2003 when the Babson Survey Research Group first began tracking online enrollment numbers, the number of students taking at least one online course has grown at a rate greater than that of the overall higher education student body. For three of these years (2003, 2005, and 2009) the growth in online students topped 20%. The pattern for the last four years, however, has been one much more moderate rates of increase. Since 2009 there have been steady year-to-year declines in the rate of growth of online enrollments.

For 2014 BSRG is no longer collecting its own enrollment data, but is now using the information contained in the 2012 and 2013 Integrated Postsecondary Education Data System. The IPEDS data is not directly comparable to the previous BSRG results due to of differing definitions and data collection methods. The two data sources, while not an exact match, are similar and address the same basic metric – the number of students engaged in at least one online (distance) course. IPEDS now has two such years of data[4], allowing the first in-depth examination of distance enrollments over time using data for the entire higher education universe. The resulting change, a growth of 3.7% year to year, is lower than any of the previous growth estimates from BSRG, but continues the pattern of declining rates of growth.

GROWTH RATE OF NUMBER OF STUDENTS TAKING AT LEAST ONE ONLINE/DISTANCE COURSE - 2003 TO 2013



Is it reasonable to compare the 3.7% growth rate from the IPDES data to that of the previous BSRG estimated growth rates given somewhat different definitions and data collection processes? Using 2014 BSRG data from 600+ sampled institutions, the conclusion is the same as for the IPEDS data; the selected subset of institutions produces an overall growth of around three and one-half percent.

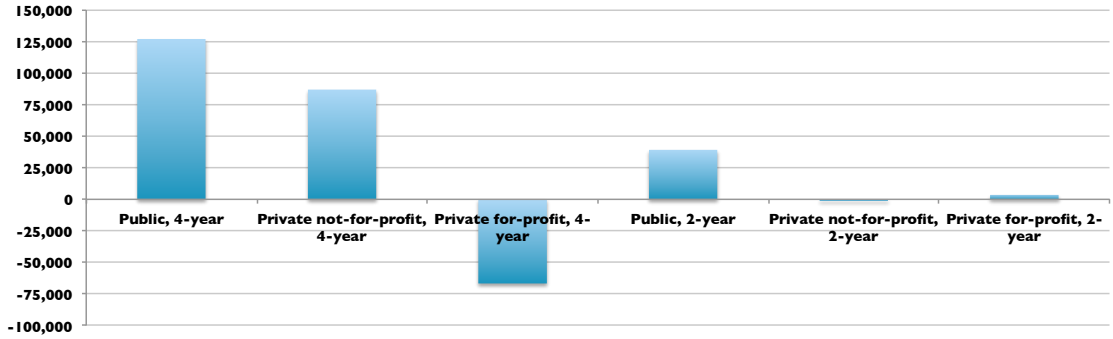
[4] Files EF2013A_DIST and EF2012A_DIST available at http://nces.ed.gov/ipeds/datacenter/DataFiles.aspx

The growth in distance enrollments was very uneven. Public institutions grew by over 160,000 students, at a rate of 4.6%. Private not-for-profit institutions grew far faster, at 12.6%, but this came on a lower base, so the total increase in the number of distance student this represents was 86,000. Private for-profit institutions actually decreased by almost eight percent (-7.9%), representing a drop of 63,000 distance students as compared to the previous year. The 2012 to 2013 decrease in distance enrollments among the for-profit sector marks the first time that any sector has shown a decrease since BSRG first began tracking enrollments in 2003.

DISTANCE EDUCATION ENROLLMENT CHANGE 2012 TO 2013

All the distance enrollment decrease among the for-profit instructions was in the four-year schools; two-year for-profit schools had steady distance enrollments. Likewise all the gains among the private not-for-profit institutions were among the four-year schools, with two-year not-for-profits showing virtually no year-to-year change. Public institutions, however, show growth for both the four-year and two-year schools.

DISTANCE EDUCATION ENROLLMENT CHANGE 2012 TO 2013



As was the case in comparing the overall rate of growth between the IPEDS and BSRG data, the pattern of those changes produced by the BSRG data matches that seen in IPEDS. Like the IPEDS results, the BSRG selected subset of institutions shows both public and private nonprofit institutions with year-to-year increases. The BSRG data also displays the same decrease as the IPEDS data in online enrollments among the for-profit institutions. The limited number of institutions in the BSRG data does not support full national-level estimates. What analysis can be done, however, fully mirrors the both size and patterns of the year-to-year changes observed in the IPEDS data.

While the growth rate may be declining, it is still greater than the growth rate of the overall higher education student body. Using the same IPEDS data sources as for the distance enrollments, the growth of overall enrollments between 2012 and 2013 was 1.2%, increasing from 20,682,643 in 2012 to 20,939,293 in 2013. The year-to-year gain in the number of distance students (189,187) represents 73.7% of the increase in overall enrollments for this time period (256,650).

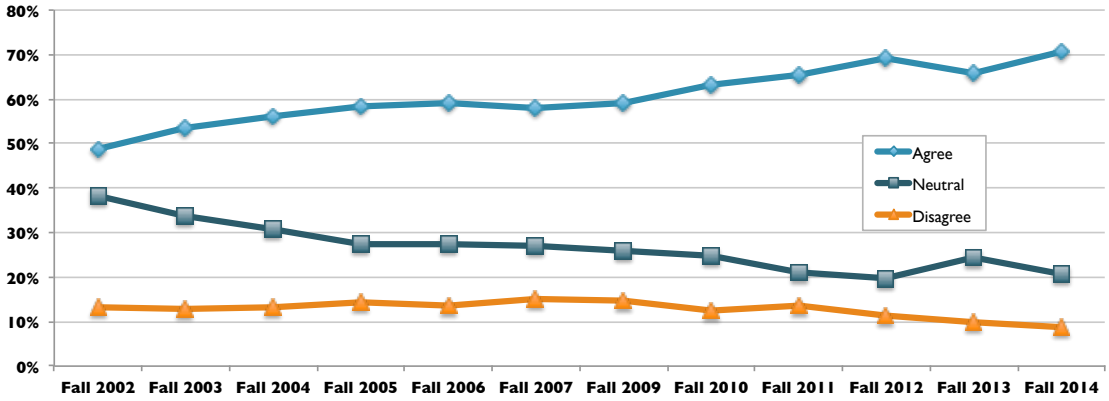
An area where the IPEDS data is not a good match for the previous BSRG results is in the estimate of the total number of students learning online (at a distance). The IPEDS results produce a smaller estimate (5,257,379 for 2013) compared to previous BSRG numbers (7,126,549). There are several reasons for this difference, among them some differences in definitions (IPEDS is stricter on which courses are counted), problems with the previous BSRG data collection (which resulted in a bias upwards), and some issues with IPEDS data collection (which bias the results downward). These issues are covered in more depth in a separate section of this report.

Is Online Learning Strategic?

Last year marked a change to the long-term pattern in the proportion of institutions that agreed to the statement "Online education is critical to the long-term strategy of my institution." Previous results showed slow increases in the number of those believing that online education was critical for their long-term strategy, a steady decline among those who were neutral, and a consistent group of holdouts that disagreed. The 2013 results contained both the largest-ever *decrease* in the proportion that agree that online is critical for their strategy, and the first-ever increase in the rate of those saying that they are neutral on the topic.

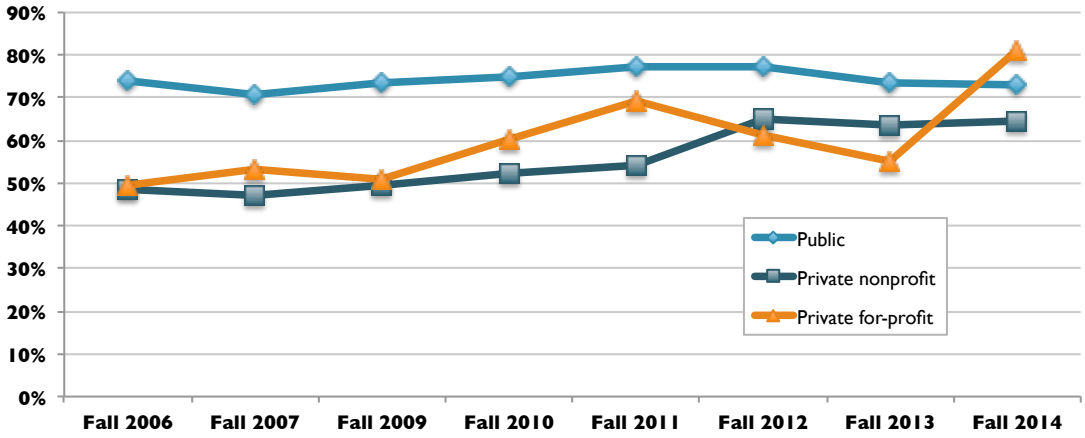
Results for 2014, however, reflect a return to the historic pattern. The proportion of schools saying that online education is critical for their institution's long-term strategy reached an all-time high of 70.8% in 2014. The proportion that disagreed was at all-time low in 2014, while the fraction saying that they were neutral was near the all-time low.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION – 2002 TO 2014



As noted in earlier reports in this series, public institutions began offering online courses and programs sooner than either private nonprofit or private for-profit institutions. As such, their level of belief that online education was critical for their long-term strategy was well above that of other types of institutions. The proportion of private nonprofit institutions that held this view has increased over time, but still lags behind that of public institutions.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY BY INSTITUTIONAL CONTROL – 2006 TO 2014

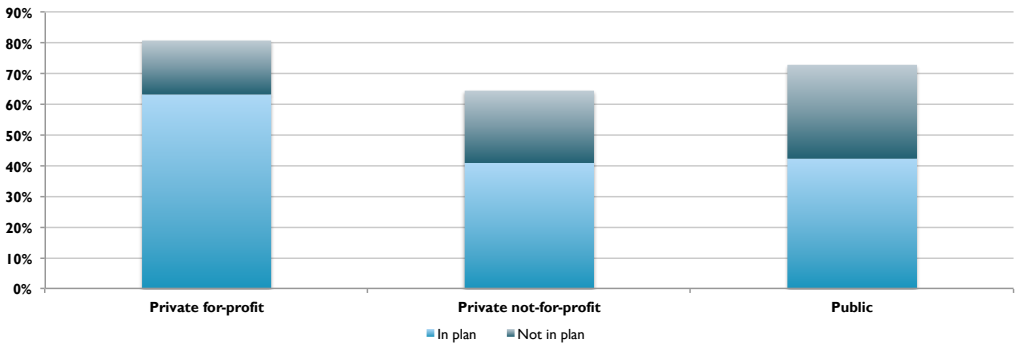


The level of agreement for private, for-profit institutions shows the greatest volatility. They began at a level similar to private nonprofits, increased faster over time for a few years, and then dropped back in 2012 and 2013. Results for 2014 show a very different picture: for the first time private for-profit institutions report a higher level of agreement than public institutions.

A number of our previous reports have noted the "gap" that exists between those who profess that online education is critical to their long-term strategy and those that have specifically included online education within their 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 APLU presidents and chancellors, Tribal College and University (TCU) presidents, and the presidents and chancellors of National Association for Educational Opportunity (NAFEO) member-institutions.

Further evidence from this series of annual studies of online education demonstrates that this gap is an important issue across all of higher education. Survey results show the same issue is present for this nationwide sample, beginning in 2010, when the question was added. The most recent responses for 2014 confirm that the gap continues to exist.

IS ONLINE EDUCATION SIGNIFICANTLY REPRESENTED IN FORMAL STRATEGIC PLAN – 2014



Of the 80.9% of the for-profit institutions that report that online education is critical for their long-term strategy, 63.4% say that online education is significantly represented in their institution's formal plan — this represents 78.3% of those for-profit institution saying online is critical. For public institutions, 72.9% report online education is critical for their strategy, but only 42.4% say it is in their plan. Likewise, only 40.9% of private nonprofit institutions report online education is in their institution's plan, while 63.5% say online education is critical for their strategy.

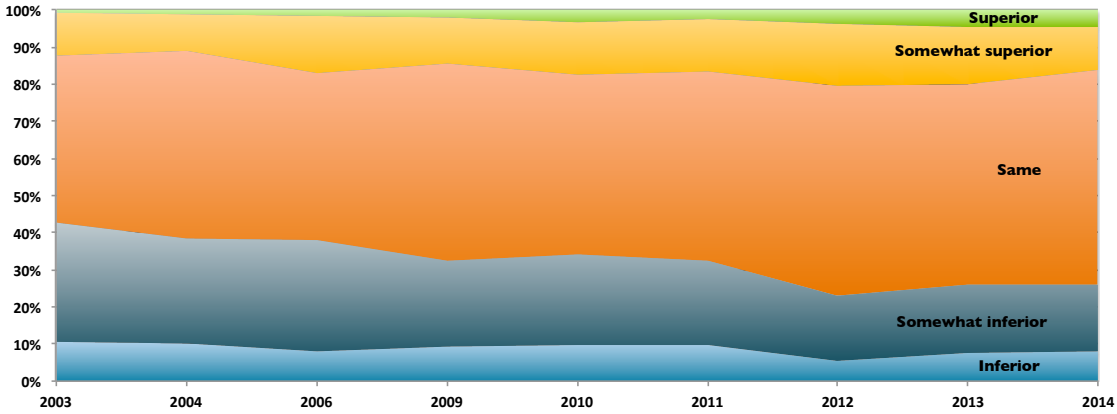
Are Learning Outcomes in Online Offerings Comparable to Face-to-Face?

For all the growth in the number of institutions with online offerings and the number of students taking online courses, there are still many who question the quality of these offerings. One reason these questions linger may be that there is no agreed upon measure of education quality – either for face-to-face or for online education. In the absence of such a measure this report series has probed the issue by asking academic leaders to rate the relative quality of the learning outcomes for online courses to those of comparable face-to-face courses.

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. In some cases, these leaders may be basing their opinions on detailed metrics for courses at their own institutions. For others the opinion may be based on far less rigorous factors, such as conversations with peers or what they have read in the press. While these are perceptions, they are still important. Survey respondents are the key academic decision makers at their institutions, and decisions are made based on these perceptions.

The view that online education is "just as good as" face-to-face instruction was not a widely held when this series of reports began in 2003: 42.8% of chief academic officers reported that they considered the learning outcomes for online instruction to be inferior to face-to-face instruction. The relative view of online quality has improved considerably over time, with a pattern of slow but steady improvement in the relative view of online learning outcomes. Results for 2013 demonstrated a partial retreat, with the proportion considering online learning outcomes to be inferior edging up a few percentage points. The 2014 results indicate that this slow retreat continues.

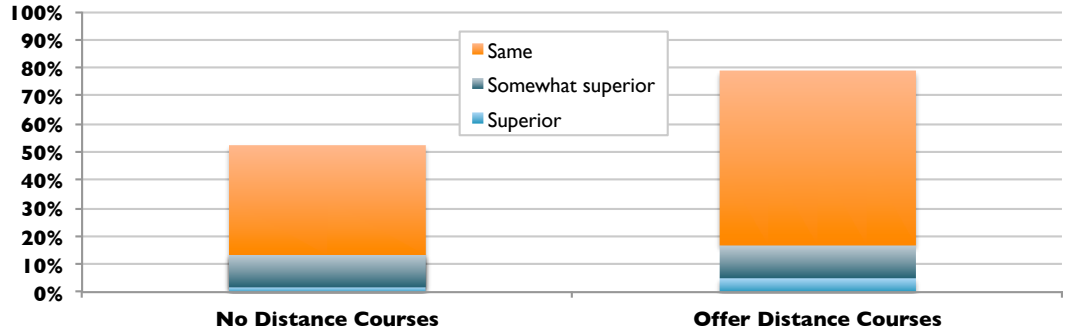
LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE: 2003 - 2014



The proportion of respondents rating online learning outcomes as "Somewhat Superior" to those for face-to-face instruction has dropped from 15.3% to 11.7% over the past year. Correspondingly, the proportion saying that they are the "Same" increased from 54.1% to 57.9%. The fraction of academic leaders rating online learning outcomes as "Inferior" or "Somewhat Inferior" remained steady at 25.9%.

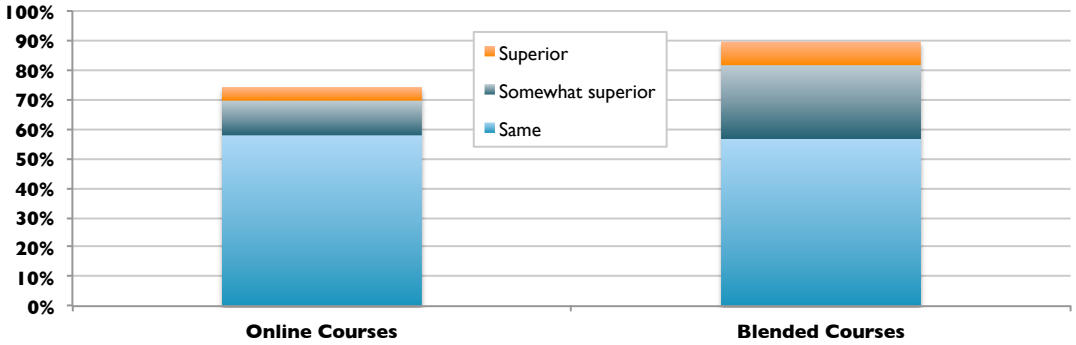
A consistent finding over the twelve years of these reports is the strong positive relationship of academic leaders at institutions with online offerings also holding a more favorable opinion of the learning outcomes for online education. The current results are no different – chief academic officers at institutions without distance education courses are more than twice as likely as those at institutions with such courses to report online learning outcomes are Inferior or Somewhat Inferior to those for comparable face-to-face courses.

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE - 2014



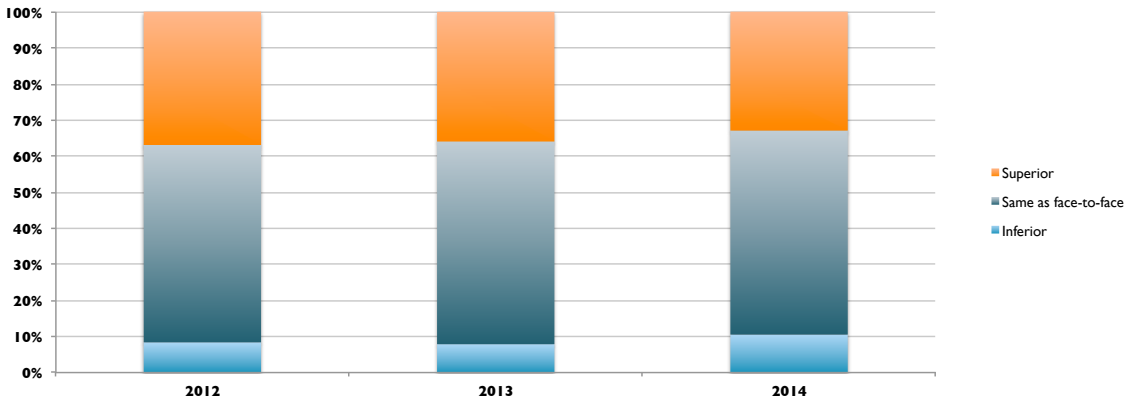
Chief academic officers may view online learning with a critical eye, but they have a far more favorable opinion about courses that combine elements of online instruction with those of traditional face-to-face teaching. Leaders consistently rate the learning outcomes for blended or hybrid courses as superior to both online instruction and classical face-to-face courses. While the majority of academic leaders rate the outcomes of online and blended learning as the "Same" as face-to-face learning (57.9% for online and 56.6% for blended), far more consider blended learning outcomes to be superior to face-to-face instruction, than online instruction (32.8% for blended versus 16.3% for online).

LEARNING OUTCOMES FOR ONLINE AND BLENDED COURSES COMPARED TO FACE-TO-FACE - 2014



The relative opinion of learning outcomes for online courses has shown a pattern of steady small growth followed by a more recent retreat. Data comparing blended learning outcomes to face-to-face instruction has only been collected for the past three years – the same time period that the trend for online courses displayed a small retreat. The pattern for blended instruction also indicates a small retreat during this same time period. The proportion of academic leaders rating blended as superior to face-to-face dropped from 36.9% to 32.8% and the proportions ranking it as inferior increased from 8.4% to 10.6% over this three-year period.

LEARNING OUTCOMES IN BLENDED/HYBRID COURSE COMPARED TO FACE-TO-FACE: 2012 - 2014



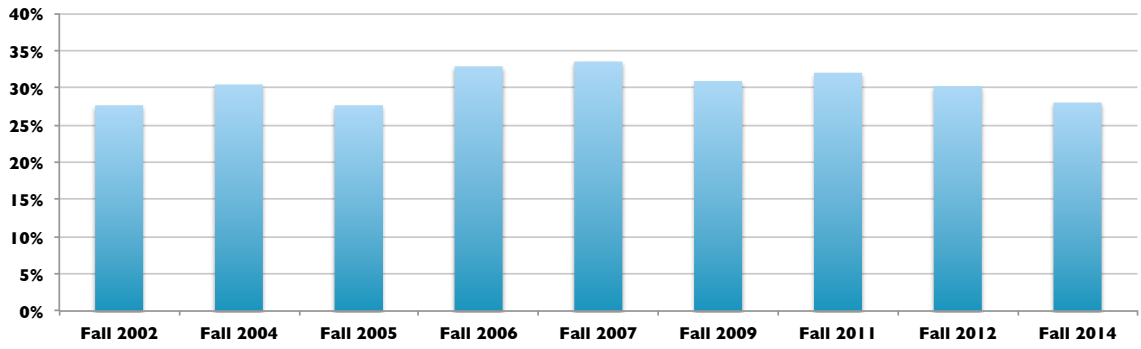
The general opinion is that the quality of blended courses is superior to that for online courses, but this view has not been exempt from whatever factors have been producing a more negative view of online instruction – perceptions of the relative quality of both online and blended instruction have shown the same small decline for each of the past two years.

Faculty Acceptance of Online Education

Chronicling the evolution of online education among U.S. higher education institutions these past twelve years has been a story of amazing successes, coupled with important failures. Key among the successes are that online courses and programs have provided millions of potential students will access to higher education that they otherwise might be denied because of time or geographic constraints. The millions of students taking online courses today is ample evidence that this modality is meeting a clear demand on the part of students.

A continuing failure of online education has been its inability to convince its most important audience – higher education faculty members – of its worth. The lack of acceptance of online among faculty has not shown any significant change in over a decade – the results from reports five or ten years ago are virtually the same as current results. For all of this time there has not been a majority of any group of higher education institutions that report that their faculty accept the "value and legitimacy of online education." Current results, if anything, show that the problem is getting worse.

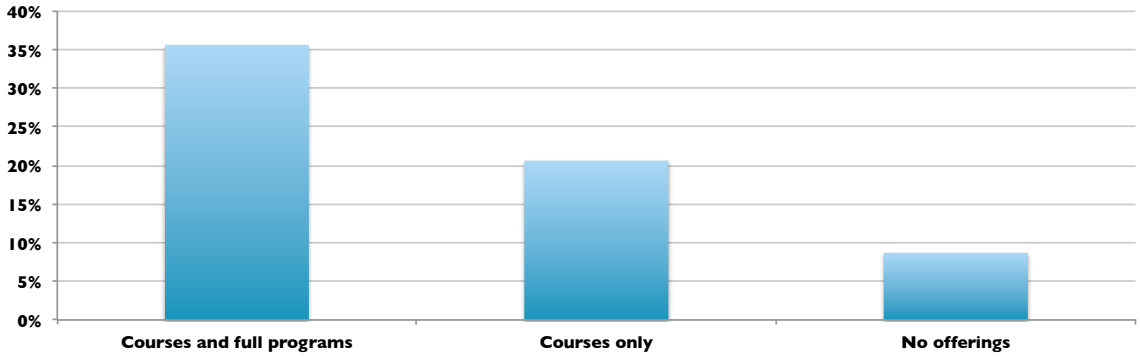
FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – FALL 2002 TO FALL 2014



Only 27.6% of chief academic officers reported that their faculty accepted online instruction in 2003. This proportion showed some improvement over time, reaching a high of 33.5% in 2007. The slow increase was short-lived, however. Today, the rate is nearly back to where it began; 28.0% of academic leaders say that their faculty accept the "value and legitimacy of online education."

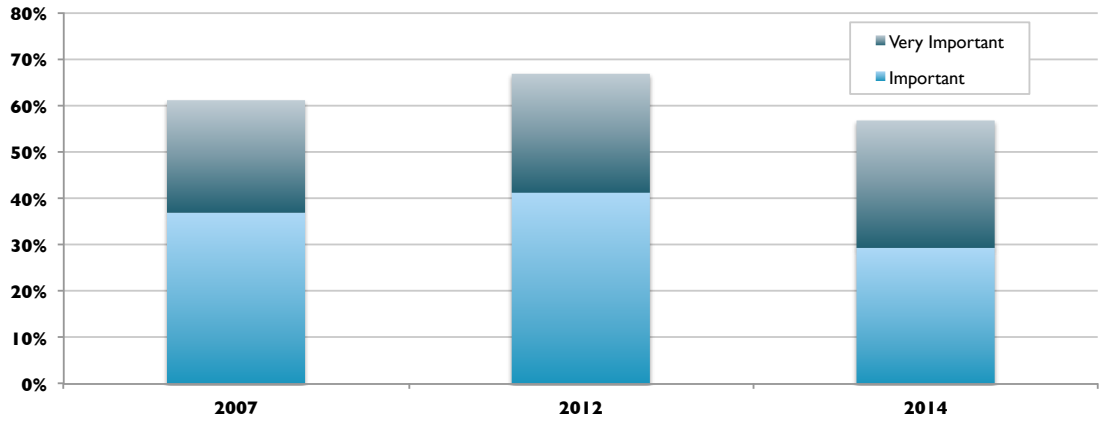
The more intensive the online presence is at an institution, the more likely faculty are to accept it. Whether this is because the exposure to online instruction has changed their minds, that they are just giving in to inevitable, or that only institutions where faculty acceptance can be gained expand their online offerings is not clear. Whatever the reason, the pattern for 2014 mirrors that for previous years: only 8.7% of institutions with no online offering report that their faculty members accept online instruction. This increases to 20.6% for those institutions that offer online courses, but not full online programs, and 35.6% at institutions with fully online programs. Note, however, that even among institutions with the most extensive online offerings, about two-thirds report that their faculty do not accept it.

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – 2014



There is one ray of hope for academic leaders planning on growing online programs: the proportion of leaders who rate the issue of faculty acceptance (or lack thereof) as a significant barrier has decreased somewhat over time. In 2007, 61.1% of chief academic officers rated faculty acceptance as an important or very important barrier to the growth of online education. By 2012 this proportion had increased to 66.8%. The most recent results show a small decrease to 56.7%. It may well be that after all of these years of continued faculty push back on online instruction, academic leaders have evolved better strategies to work around the lack of faculty acceptance. However, even the improved results show a majority of leaders consider this issue to be critical for the growth of online education.

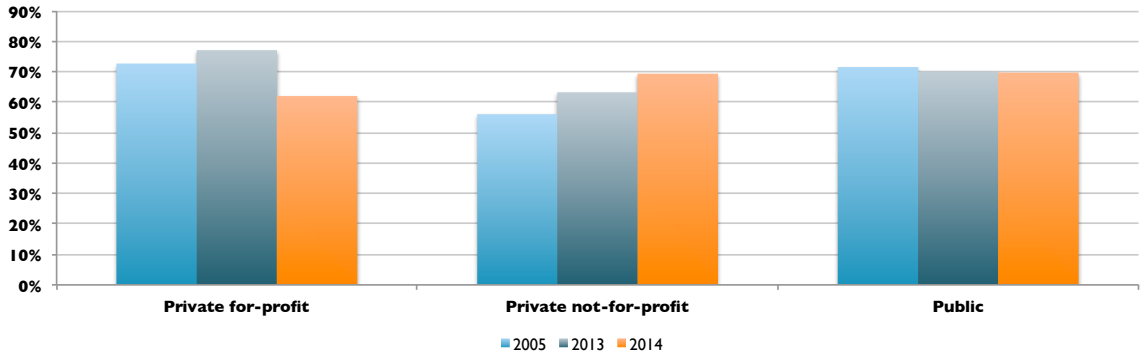
IMPORTANCE OF LACK OF ACCEPTANCE OF ONLINE INSTRUCTION BY FACULTY IS A BARRIER TO ADOPTION OF ONLINE - 2007, 2012, AND 2014



Do Students Require More Discipline to Complete Online Courses?

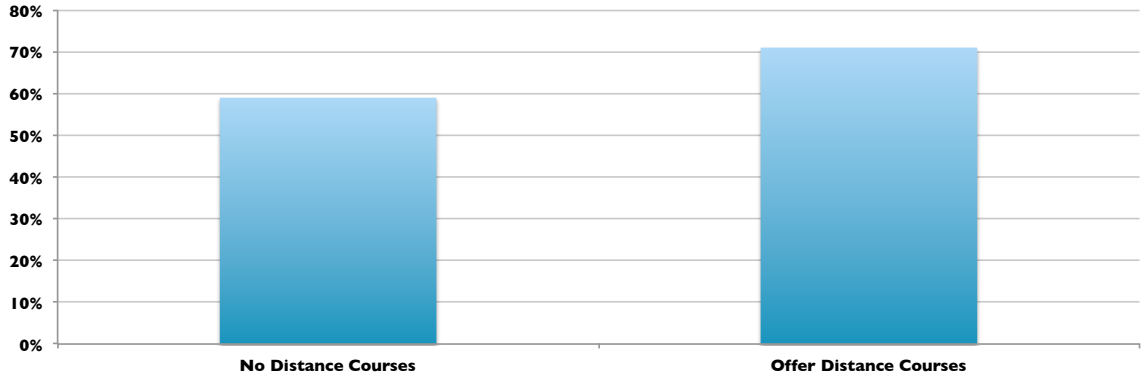
Academic leaders have been consistent in their belief that "Students need more discipline to succeed in an online course than in a face-to-face course." In 2005, a majority of respondents (64.7%) agreed with this statement. By 2013, the proportion had grown to 68.9%, and it now stands at 68.3% for the current 2014 results. All types of institutions have very similar levels of agreement, private for profit institutions have shown a recent decline in the proportion agreeing, while private not-for-profit institutions show a corresponding increase. The proportion of academic leaders at public institutions who report that students need more discipline to succeed in online courses has remained consistent over time.

STUDENTS NEED MORE DISCIPLINE TO SUCCEED IN AN ONLINE COURSE THAN IN A FACE-TO-FACE COURSE - 2014



While a majority of all academic leaders say that students need more discipline to succeed in an online course than in a face-to-face course, the leaders at institutions with distance courses (and therefore have more direct experience with these types of courses) have the strongest level of agreement. This pattern has been consistent over time: leaders with the most experience with online and distance courses are the most likely to report that students need more discipline to succeed in them.

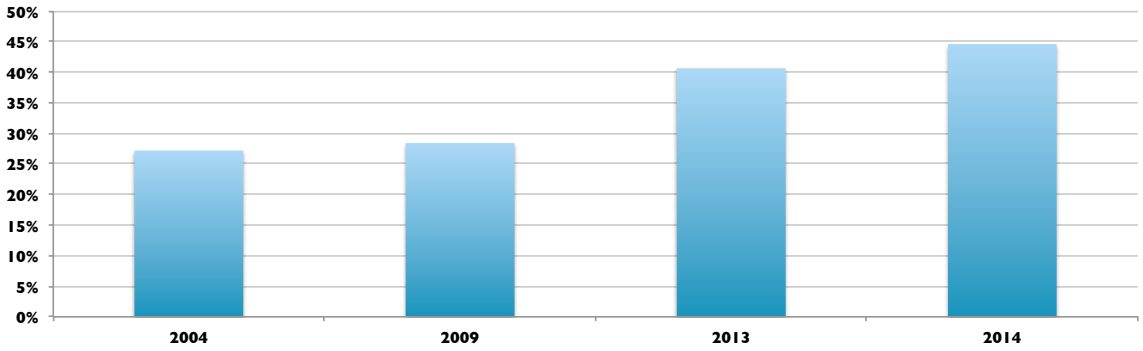
STUDENTS NEED MORE DISCIPLINE TO SUCCEED IN AN ONLINE COURSE THAN IN A FACE-TO-FACE COURSE - 2014



Is Retention of Students Harder in Online Courses?

There is a growing concern among academic leaders on the issue of student retention. A total of 44.6% of chief academic officers reported that they agreed that retaining students was a greater problem for online courses than for face-to-face courses. This compares to rates of 40.6% in 2013, 28.4% in 2009 and 27.2% in 2004 for the same question.

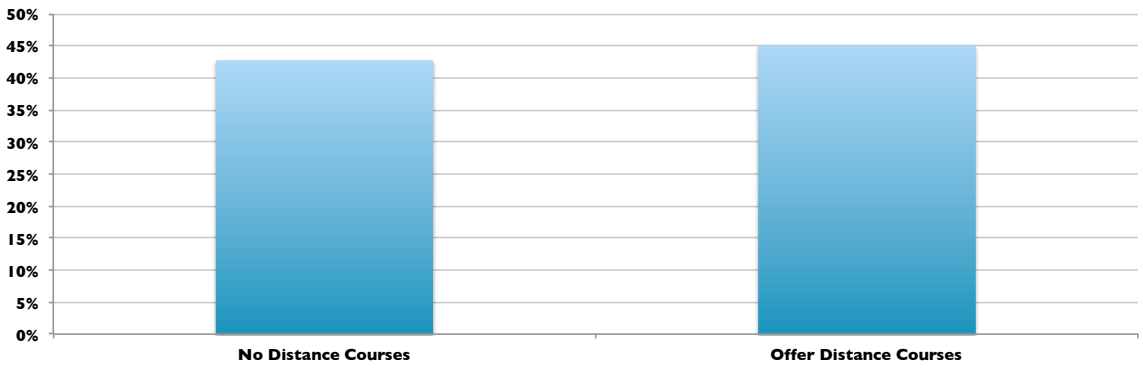
RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES: 2004, 2009, 2013 AND 2014



While these results show an increasing level of belief that student retention for online courses is a greater problem than for face-to-face instruction, it does not tell us why this is so. The nature of students in online courses can be very different from those in face-to-face courses. Students might select online because they are not able to attend traditional on-campus instruction because of work, family, or other obligations. If students are more likely to drop out of an online course because of work or family commitments, does that reflect on the nature of the course, or the nature of the student?

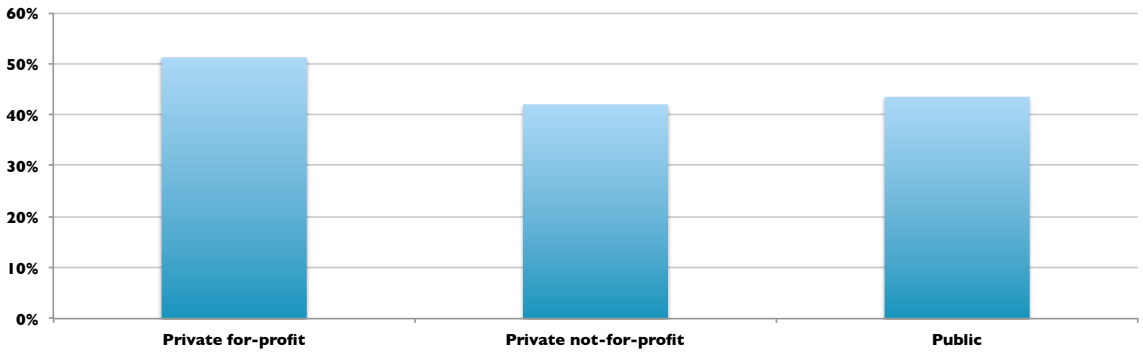
The belief that it is harder to retain students in online courses is held equally among those with distance offerings and those without. It can be expected that the leaders at institutions with distance offerings are responding based on their own institution's experiences. Leaders at institutions with no distance courses are most likely basing their response on what they have heard from their peers or read about online courses.

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES - 2014



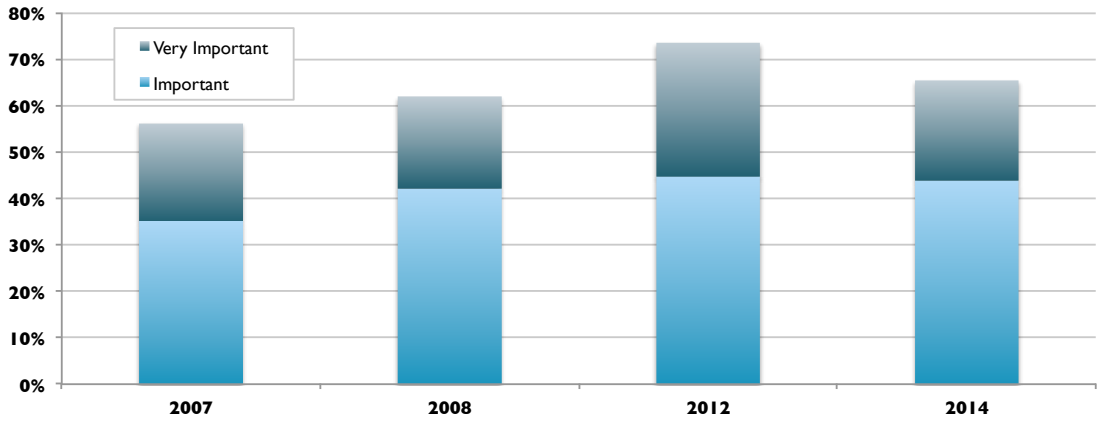
Academic leaders at private for-profit institutions have the highest likelihood of reporting that retaining online students is harder, but this belief is widely held at all types on institutions. Over one-half of the leaders at for-profits think that this is the case (51.3%), while 42.1% of private not-for-profit institutions and 43.6% of leaders of public institutions agree.

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES - 2014



The degree to which chief academic officers consider lower retention rates in online courses to be a barrier to the growth on online education peaked in 2012, when 73.5% rated the issue as either important or very important. The level of concern has dropped for 2014, with 65.4% now rating it as important or very important. While somewhat diminished, two-thirds of all academic leaders continue to consider retention of online students a critical issue for the future of online education.

IMPORTANCE OF LOWER RETENTION RATES IN ONLINE COURSES AS A BARRIER TO ADOPTION OF ONLINE - 2007, 2008, 2012, AND 2014

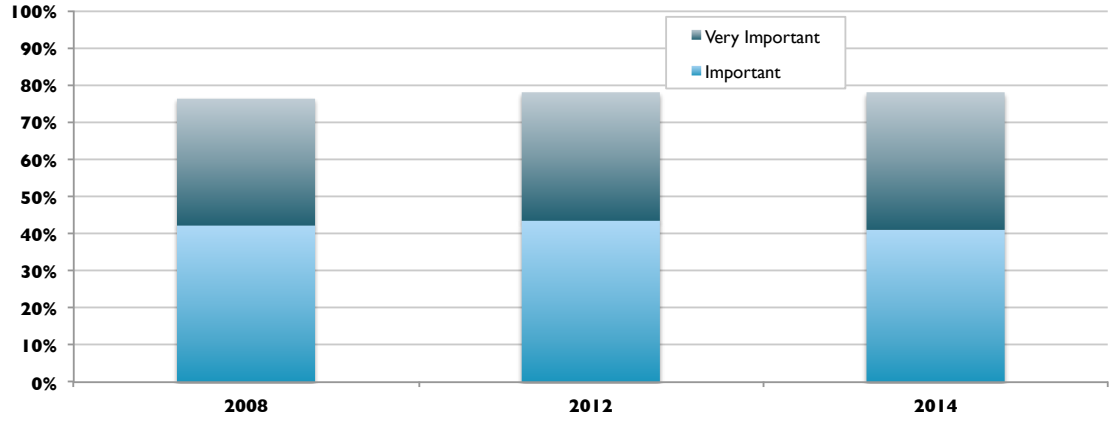


Barriers to the Growth of Online Education

When online education first arrived on the scene one of the hopes was that teaching with technology would be more efficient that current methods. Perhaps faculty could teach more students with improved quality by taking advantage of the new technology. This has not proven to be the case. Academic leaders have continued to report that it takes more time and effort for a faculty member to teach an online course than to teach a corresponding face-to-face course.

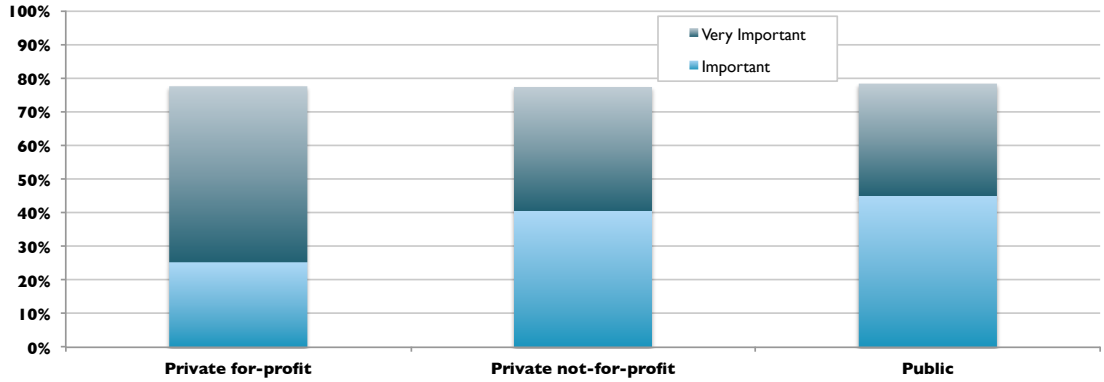
A majority of leaders report that the additional effort required to delivery an online course represents a barrier for online instruction. New technologies, faculty experience with teaching online, and expanded and improved institutional support services have not had any effect in reducing this problem. The level of concern in 2014, with 78.0% reporting it as an "Important" or "Very Important" barrier to the adoption of online instruction, is higher than it was in 2008 (76.3%).

IMPORTANCE OF ADDITIONAL FACULTY EFFORT REQUIRED TO DELIVER ONLINE COURSES AS A BARRIER TO ADOPTION OF ONLINE - 2008, 2012, AND 2014



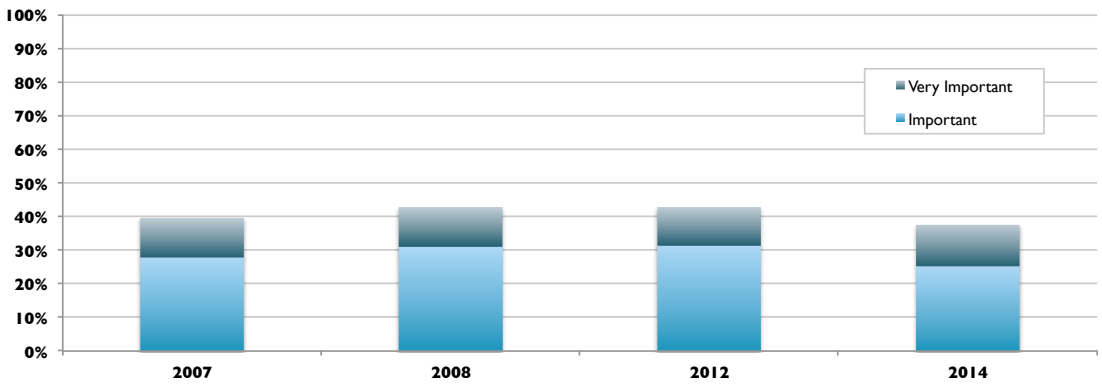
The proportion of leaders who believe this issue to be "Important" or "Very Important" is consistent for all types of schools: 77.6% for for-profit, 77.3% for not-for-profit, and 78.3% for public institutions. The intensity of this opinion is strongest among the private for-profit academic leaders, where over one-half rate the issue as "very important." This compares to about one-third of the leaders at the other two types of institutions that rate this as "very important."

ADDITIONAL FACULTY EFFORT REQUIRED TO DELIVER ONLINE COURSES IS A BARRIER TO ADOPTION OF ONLINE - 2014



One potential barrier that has changed very little is the level of concern among chief academic leaders about the potential lack of acceptance of online education by potential employers. This question was first posed in the 2007 survey, where it was presented in a list of six potential barriers to online adoptions. In both 2007 and then again in 2008, concerns about acceptance of online degrees by potential employers was area that gave academic leaders the least amount of concern. The proportion reporting this as an "Important" or a "Very Important" barrier has remained consistent over the years at around forty percent. There was a very small increase from 2007 to 2008, 2012 results matched those for 2008, and the most recent results show a drop back below the 2008 values.

IMPORTANCE OF LACK OF ACCEPTANCE OF ONLINE DEGREES BY POTENTIAL EMPLOYERS AS A BARRIER TO ADOPTION OF ONLINE - 2007, 2008, 2012, AND 2014



All types on institutions continue to rank this concern at the bottom of the list of potential barriers; however, private for-profit institutions show a somewhat higher level. Nearly one-half of all leaders among the for-profit sector rank this as a critical barrier (47.2%). This compares to 37.4% for the leaders at private, not-for-profit institutions and 32.8% of the leaders at public institutions.

IMPORTANCE OF LACK OF ACCEPTANCE OF ONLINE DEGREES BY POTENTIAL EMPLOYERS AS A BARRIER TO ADOPTION OF ONLINE - 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 research beginning with our 2009 survey. Results for 2009 and 2011 found most surveyed academic leaders believed that OER would have value for their campus. In 2011, 57% agreed that they have value and less than 5% disagreed. These results were similar to those for the same question in 2009.

Other findings from these studies of academic leaders included[5]:

- Nearly two-thirds of all chief academic officers agreed that open educational resources have the potential to reduce costs for their institution.
- There was wide agreement among academic leaders that open educational resources will save time in the development of new courses.

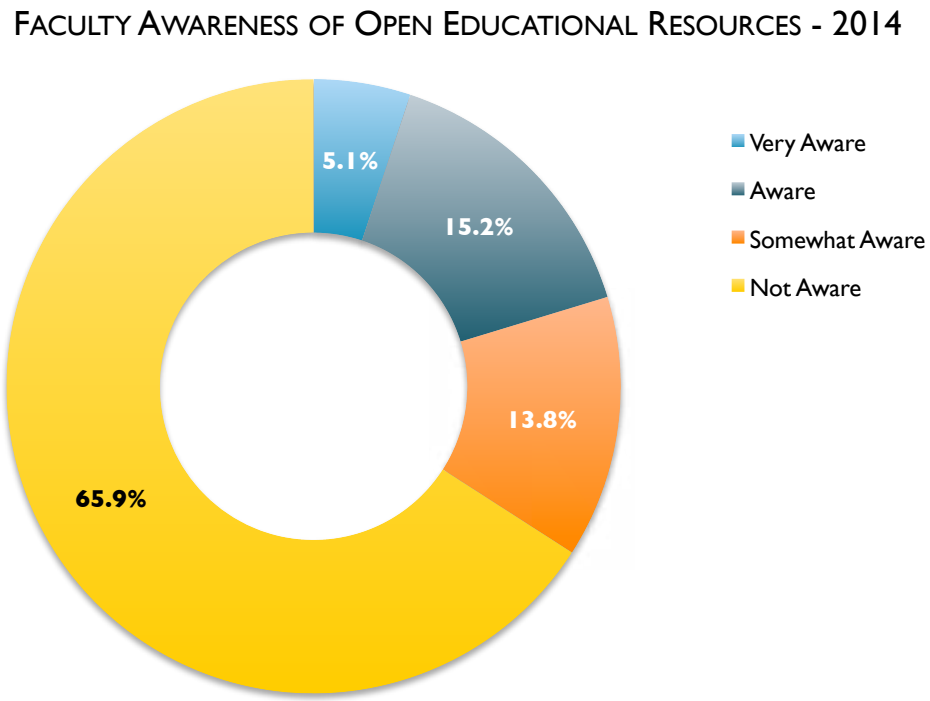
A critical issue in measuring the level of OER awareness is exactly how the question is worded. As previous studies demonstrated, many academics have only a vague understanding of the details of what constitutes open educational resources. Some confuse "open" with "free," and assume all free resources are OER. Still others confuse "open resources" with "open source" and assume OER refers only to open source software.

The importance of question wording was apparent in our studies of OER awareness among academic leaders. In 2011 nearly all of these leaders reported that they were at least somewhat aware of open educational resources (OER) and over one-half listed themselves as "Aware" or "Very Aware." 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. Critically, many leaders claiming to be aware may have been confusing OER with other concepts.

To address the misunderstandings evident in the previous work, multiple question wordings were tested for our most recent study of OER awareness among higher education teaching faculty. No single wording was ideal; all had their own issues. The version selected was found to have the best balance in differentiating among the different levels of awareness, while avoiding leading those with no previous knowledge of the concept.

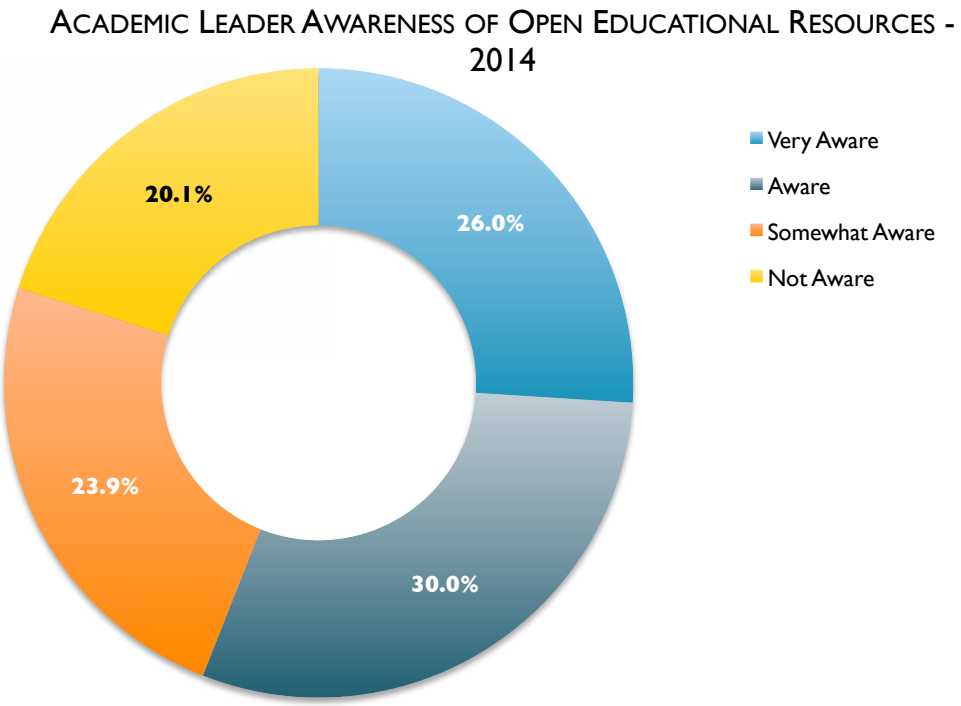
[5] I. Elaine Allen and Jeff Seaman, *Growing the Curriculum: Open Education Resources in U.S. Higher Education*, Babson Survey Research Group, 2012, http://www.onlinelearningsurvey.com/oer.html

When faculty members were asked to self-report their level of awareness of OER using this new more-specific question, a bit more than one-third claimed to have some level of awareness[6]. Just over 5% reported that they were very aware ("I am very aware of OER and know how they can be used in the classroom"), with around three times that many (15.2%) saying that they were aware ("I am aware of OER and some of their use cases"). An additional 13.8% of faculty reported that they were only somewhat aware ("I am somewhat aware of OER but I am not sure how they can be used"). This left nearly two-thirds of faculty reporting that they were generally unaware of OER ("I am not aware of OER" or "I have heard of OER, but don't know much about them").

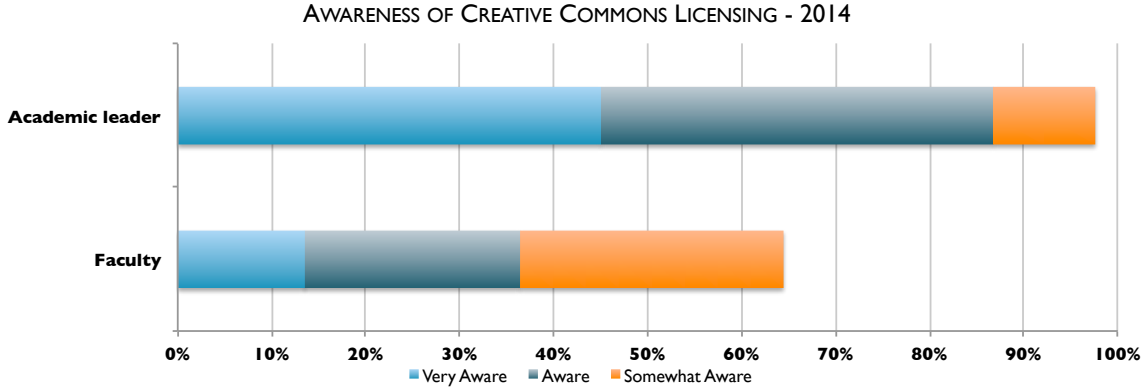


[6] The teaching faculty results are taken from I. Elaine Allen and Jeff Seaman, *Opening the Curriculum: Open Education Resources in U.S. Higher Education*, Babson Survey Research Group, 2014, http://www.onlinelearningsurvey.com/oer.html

This revised awareness question was posed to this year's sample of chief academic officers. Academic leaders are far more aware of Open Educational Resources than are their faculty members. Four times as many leaders report that they are very aware than do faculty (26.0% compared to 5.1% for faculty). Far fewer leaders say that they are unaware of OER, with only one in five so reporting (20.1%) — a rate far lower than that reported by teaching faculty (65.9%)



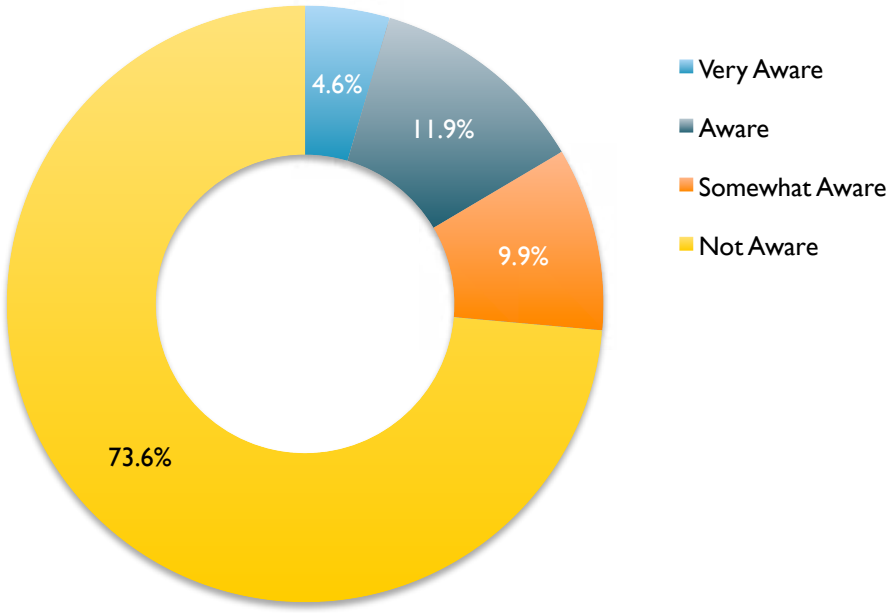
The availability of open licensing and the ability to reuse and remix content is central to concept of open educational resources, and a Creative Commons license is often central to this. Most faculty reported that they are aware of copyright licensing of classroom content and public domain licensing, but fell short on awareness of Creative Commons licensing. Less than two-thirds of faculty report that they are at least somewhat aware of Creative Commons licensing, with the remaining one-third saying that they are unaware. The level of awareness of this licensing mechanism is far higher among academic leaders, with nearly all claiming some level of awareness.



As noted above, faculty members may have only a "fuzzy" understanding of open educational resources. By asking additional questions about the related details, we can begin to understand how precise that understanding and awareness might be. Since licensing is so critical to the concept of OER, examining the difference between respondents who report that they are aware of OER and respondents who report that they are aware of both OER and Creative Commons licensing gives us a good indication of the depth of understanding of OER. If respondents who report that they are unaware of Creative Commons licensing are removed for any of the aware categories of the measure of OER awareness, we create a much stricter index of OER awareness.

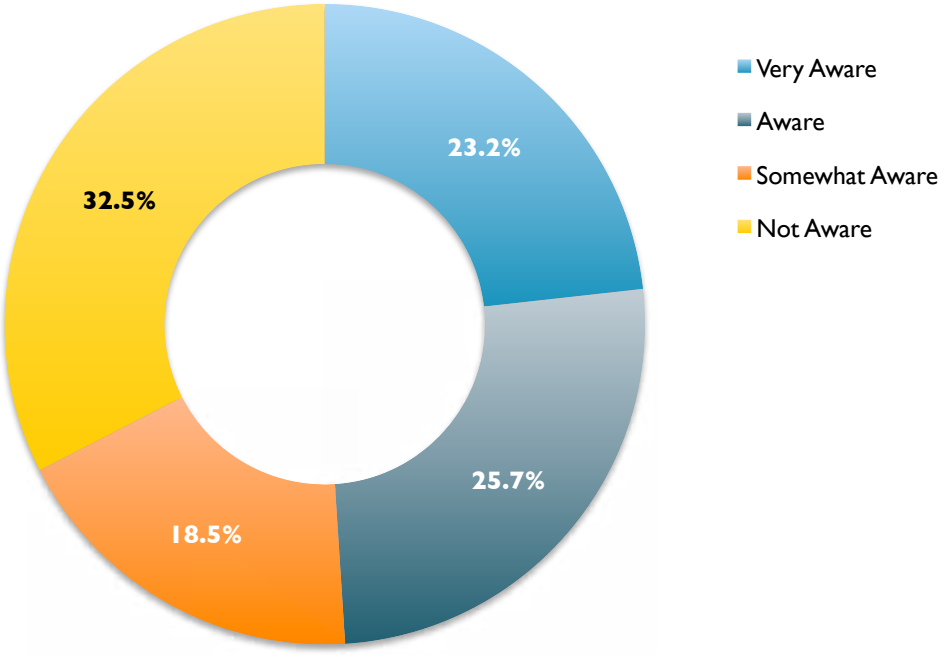
Among faculty, the level of OER awareness drops when we apply this stricter definition, but only somewhat. Those classified as "Very Aware" dip from 5.1% to 4.6%, "Aware" from 15.2% to 11.9%, and "Somewhat Aware" from 13.8% to 9.9%. The overall proportion classified into any of the aware categories changes from 34.1% when awareness of Creative Commons is not required to 26.4% when it is required.

FACULTY AWARENESS OF OPEN EDUCATIONAL RESOURCES AND CREATIVE COMMONS - 2014



The picture among academic leaders for their level of OER awareness shows a similar change when we apply this stricter definition. Those classified as "Very Aware" goes from 26.0% to 23.2%, "Aware" from 30.0% to 25.7%, and "Somewhat Aware" from 23.9% to 18.5%. For academic leaders the overall proportion classified into any of the aware categories changes from 79.9% when awareness of Creative Commons is not required to 67.5% when it is.

Academic Leader Awareness of Open Educational Resources and Creative Commons

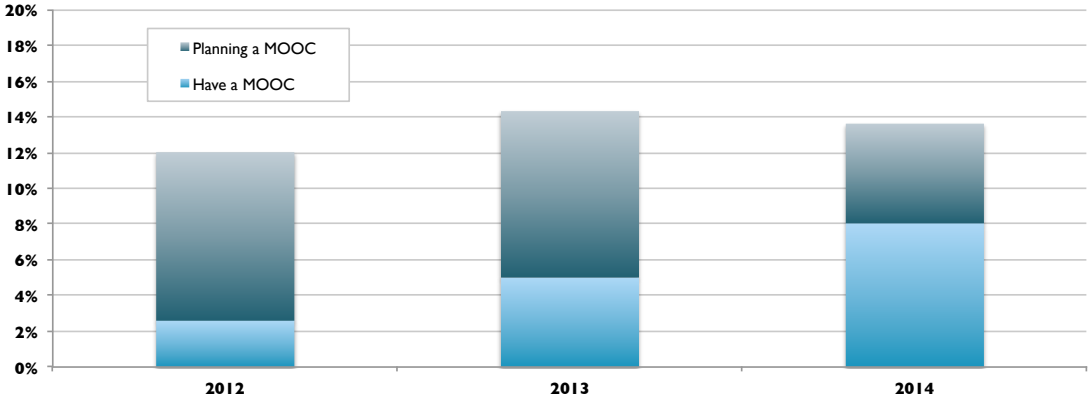


Using both the general measure of OER awareness and the stricter measure requiring awareness of Creative Commons licensing, it is clear that academic leaders are far more aware of OER than are their faculty members. This may be related the previous results, where these leaders saw OER as having great potential to save costs for the institutions, as well as potentially save time in course development efforts.

Massive Open Online Courses (MOOCS)

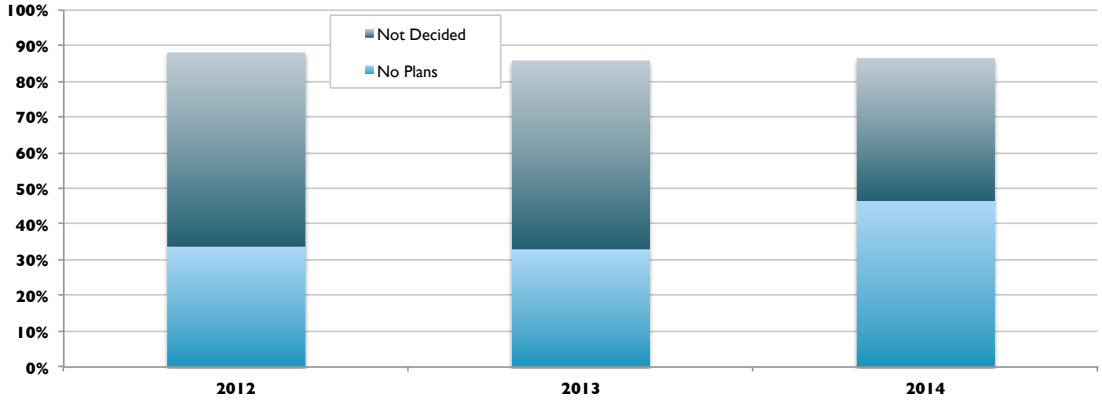
The hype around Massive Open Online Courses (MOOCs) has subsided from the level of a few years ago. Our 2012 report noted that only 2.6% of institutions were offering a MOOC, and just 9.4% had plans to offer them. A year later in 2013 the number with a MOOC, while still small, had almost doubled to 5.0%, while the number actively planning for a MOOC has remained stable at 9.3%. Results for 2014 show further growth in the number of institutions with MOOCs, to 8.0%, but a decrease in the number planning to add one.

STATUS OF MOOC OFFERINGS: 2012, 2013, AND 2014



There has been a decrease in the number of undecided institutions among those that do not have a MOOC or have current plans for one. The undecided number was 54.2% in 2012, 52.7% in 2013, and now 39.9% in 2014. Likewise the proportion of institutions that have concluded not to introduce a MOOC has grown (33.7% in 2012, 33.0% in 2013, and 46.5% in 2014).

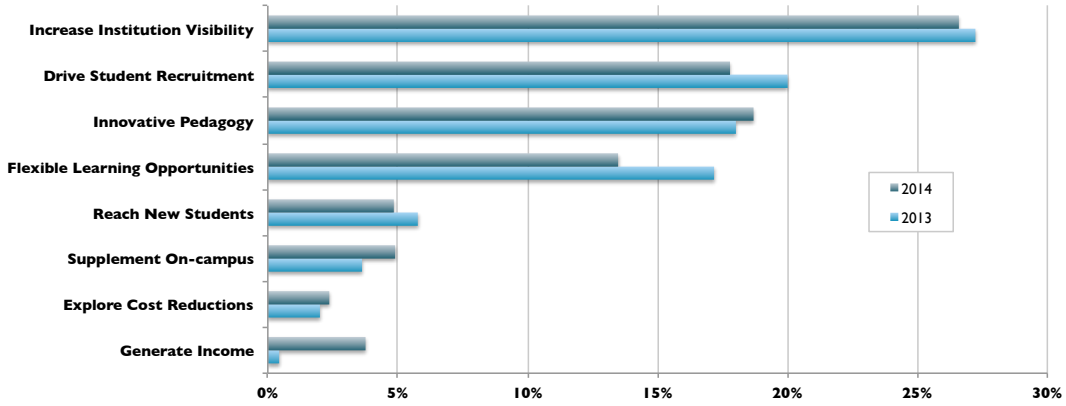
STATUS OF MOOC OFFERINGS: 2012, 2013, AND 2014



Academic leaders at institutions that had a MOOC offering or plans for one were asked what was the primary objective they had in introducing their MOOC(s).

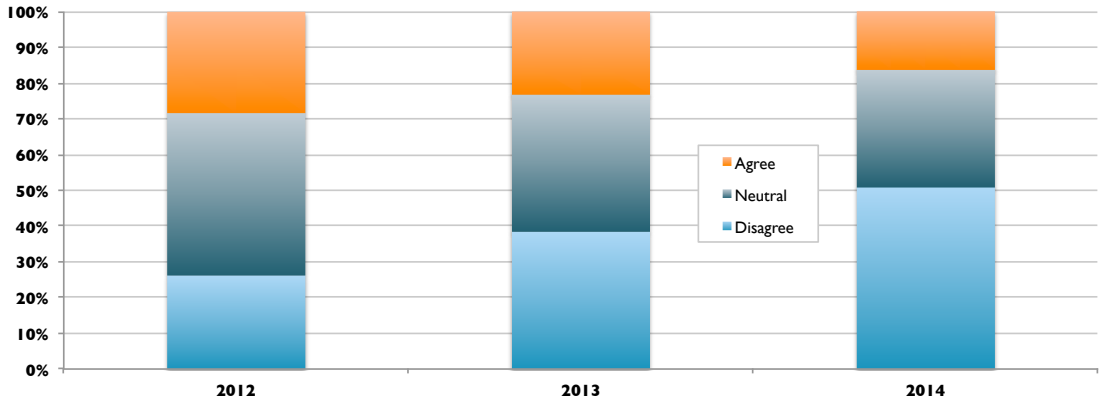
The most cited objective, accounting for over one-quarter of all institutions with current or planned MOOCs, is to "increase the visibility of the institution." A second marketing-related objective, to "drive student recruitment," was also highly cited. Two issues related to course design, "experiment with innovative pedagogy" and "provide more flexible learning opportunities" were cited at rates similar to those for student recruitment. There has been little change in the pattern of MOOC objectives from 2013 to 2014.

PRIMARY OBJECTIVE FOR YOUR INSTITUTION'S MOOC: 2013 AND 2014



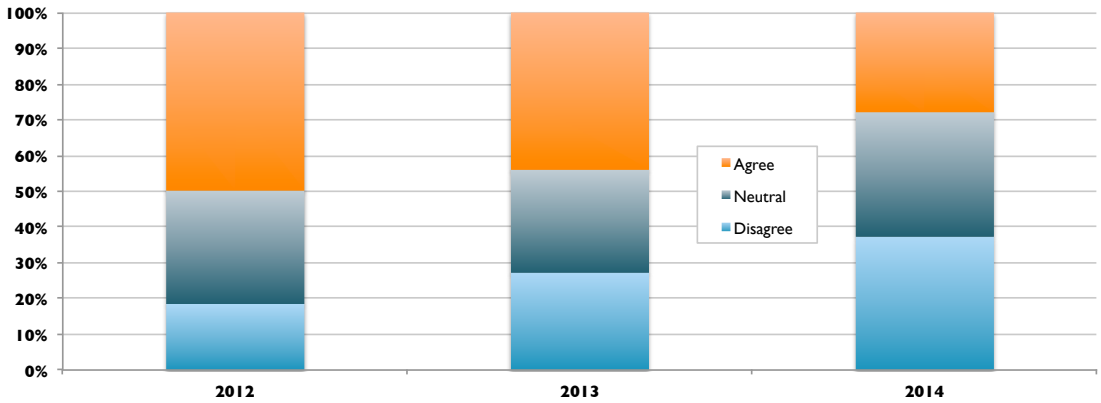
All institutions — those with MOOCS and those without — were asked to speculate on the current and potential role that MOOCs might play for higher education, including whether or not they consider MOOCs to be sustainable. The number of institutions saying that they consider MOOCs to be sustainable fell from 28.3% in 2012 to 23.2% in 2013, to only 16.3% in 2014. The portion of academic leaders saying that they do not believe MOOCs are sustainable increased from 26.2% in 2012 to 28.5% in 2013, to 50.8% in 2014. A majority of all academic leaders now state that they do not think the MOOCs are a sustainable method for offering courses.

MOOCS ARE A SUSTAINABLE METHOD FOR OFFERING COURSES: 2012, 2013 AND 2014



One positive aspect for MOOCs noted in our 2012 report was the relatively high level of agreement among chief academic officers that MOOCs represent an important means for institutions to learn about online pedagogy: less than 20% of all institutions disagreed with this statement. This optimism is rapidly evaporating, however. The portion of leaders who disagree with this has grown to 37.3% in 2014, with only 27.9% agreeing (down from 49.8% two years ago).

MOOCs are Important for Institutions to Learn About Online Pedagogy: 2012, 2013 and 2014

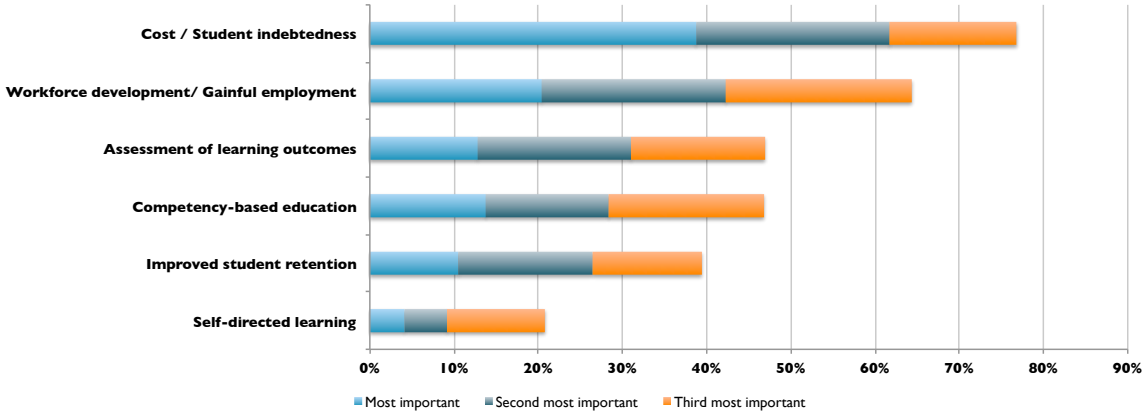


Only a small portion of higher education institutions are engaged with MOOCs, and adoption levels seem to be plateauing. The total number of institutions reporting a current or planned MOOC actually dropped in 2014. Greater numbers of institutions are moving from the undecided stage to a decision not to introduce a MOOC. The level of excitement has clearly dropped over the past two years, perhaps because academic leaders are now less convinced that MOOCs are sustainable or can be used to learn about online pedagogy.

What Will Drive the Future of Higher Education?

Academic leaders believe that cost and employment issues will be the primary factors driving the future on higher education.

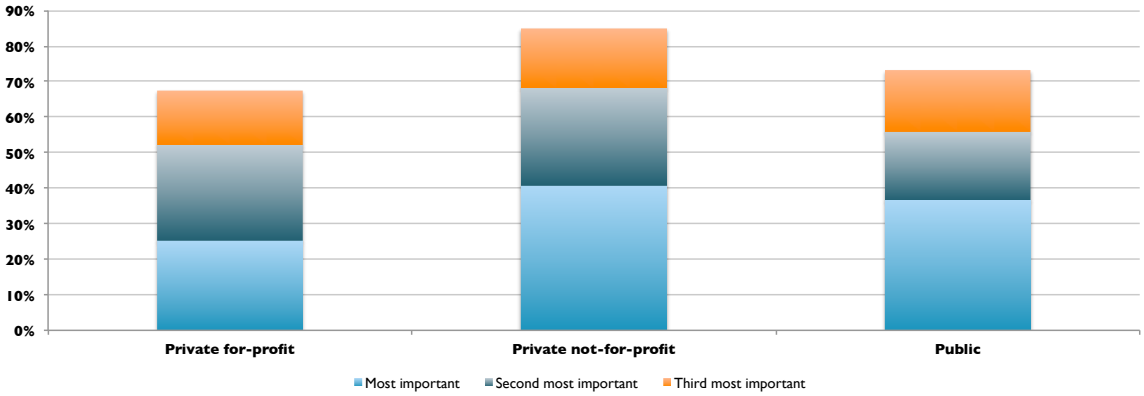
FACTORS WITH THE GREATEST IMPACT ON THE FUTURE OF HIGHER EDUCATION - 2014



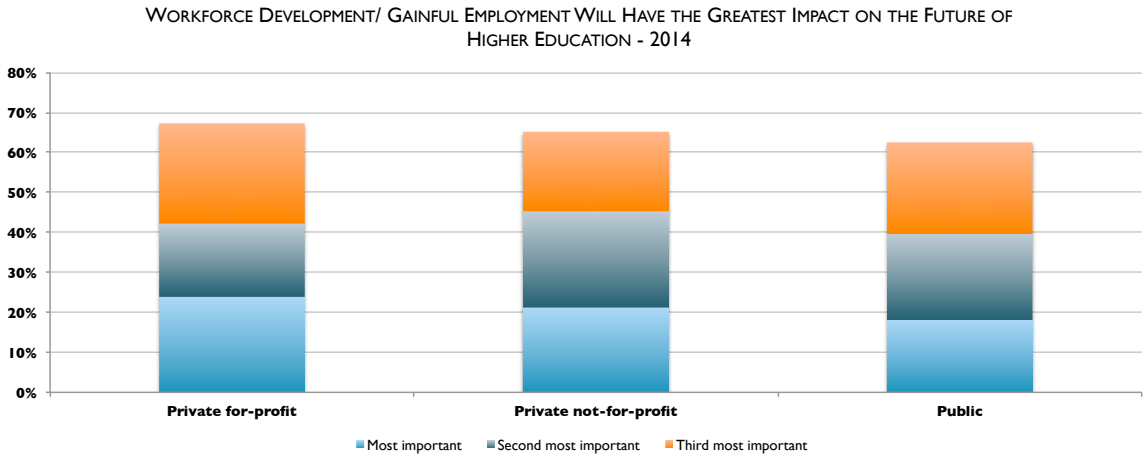
Over three-quarters of chief academic officers selected "Cost / Student indebtedness" as one of the top three factors that will have the greatest impact on the future of higher education. The proportion selecting cost issues as their top priority (38.8%) is highest among the different potential factors by a considerable margin.

Leaders of private, not-for-profit institutions were strongest in their belief that cost issues will impact high education, with nearly all of these leaders (84.9%) selecting it as a top three factor. A greater proportion (40.7%) of these leaders also picked this as the most important factor driving the future of higher education.

COST / STUDENT INDEBTEDNESS WILL HAVE THE GREATEST IMPACT ON THE FUTURE OF HIGHER EDUCATION - 2014



Academic leaders selected "Workforce development / Gainful employment" second most often, with 20.4% picking it as the most important factor and 64.4% as one of their top three factors. The pattern of relative importance of work force issues is somewhat different from that for cost issues. The private, for-profit institutions have the highest percentage rating this factor, both as most important and as one of the top three. Leaders at public institutions, while still rating workforce issues as the second most important, had slightly lower levels of agreement.



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 is collected by both the Babson Survey Research Group and by the College Board[7]. The College Board includes questions for this study as part of its extensive data collection effort for its Annual Survey of Colleges. Babson Survey Research Group and the College Board coordinate survey instruments and sample outreach. Each respondent institution receives identically worded questions, and those that have responded to one survey are not asked to respond to the same questions on the other.

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 free copy.

The universe of active, degree-granting higher education institutions that are open to the public contains 4,891 institutions; a total of 2,807 survey responses were included in the analysis, representing 57.4% of the sample universe. Because non-responding institutions are predominately those with the smallest enrollments, the institutions included in the analysis represent 78.7% percent of higher education enrollments. The 2013 responses were merged with the data from the previous survey years (994 responses in 2003, 1,170 in 2004, 1,025 in 2005, 2,251 in 2006, 2,504 in 2007, 2,577 in 2008, 2,590 in 2009, 2,583 in 2010, 2,512 in 2011 2,820 in 2012, and 2,831 in 2013) for examination of changes over time.

Institutional descriptive data come from the College Board Annual Survey of Colleges and from the National Center for Educational Statistics' IPEDS database[8]. After the data was compiled and merged with the College Board Annual College Survey and 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 unique 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.

[7] 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.
[8] http://nces.ed.gov/ipeds/datacenter/DataFiles.aspx

TRANSITIONING TO IPEDS DATA

Moving from 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 these reports.

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

Enrollment numbers: BSRG results have been biased upwards due to inflated estimates from responding schools. IPEDS numbers may suffer some level of undercounting, but are closer to the actual numbers than the BSRG data.

Changes over time: Biases in the BSRG numbers appear to be consistent over time, meaning that year-to-year rate of change results are comparable with current estimates based on IPEDS data.

Who has online (distance) course offerings?

When BSRG conducted the first of these reports in 2003, the hypothesis was that the most important transition point for an institution was when it moved from having NO online offerings, to having ANY such offerings. As such, the 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."[9] Non-credit courses, continuing education courses, courses for alumni, and courses for students not registered for a degree program do not qualify for the IPEDS definition.

The BSRG and IPEDS measures agree very well for all but the very smallest institutions. For schools with less than 1,000 total students, the BSRG measure includes far more institutions than does the IPEDS measure. These schools typically lack the resources to launch significant online offerings (those that would be counted by IPEDS), but have consistently reported that they regard online education as critical. Their online offerings are very small, rarely part of their core program, and typically not for credit. It is very rare for these to be part of a degree-program, and therefore to be counted by IPEDS.

In summary, IPEDS is a measure of providing distance courses for those pursuing a degree and BSRG is a measure of providing ANY online offering of any type for any participant. All institutions that meet the IPEDS definition will also meet the BSRG definition, but the reverse is not necessarily true.

[9] http://nces.ed.gov/ipeds/glossary/?charindex=D

How many students are learning online (at a distance)?

The BSRG definition of what constitutes an online course is somewhat different than the IPEDS definition of distance education. IPEDS "includes only students enrolled for credit as of the institution's official fall reporting date or October 15." The BSRG measure includes all students in for-credit courses, whether or not the student is enrolled for credit. This means the each measure can be, at best, only rough approximations of the other.

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

Potential sources of error in the BSRG national estimates are issues related to the estimation techniques, and bias in the data reported by institutions to BSRG.

The estimation technique has not been a cause of significant bias in the BSRG estimates. The national number is the sum of separate estimates in 35 different sub-groups. Three estimates are produced for each subgroup: using data from the most recent year, using pooled data from the most recent two years, and by applying growth percentages for similar schools present in both of the most recent two years. Corrections are applied for non-responses and for potential response bias. All data is checked against previous years, similar schools in that category, and for overly large changes.

An early test of this process examined the ability of the sampling and estimation technique to reproduce the known overall enrolment number, and produced a result only 0.3% different from the actual number reported by IPEDS.

A second reason to believe that the estimation process itself is not of concern is that since 2006, when the College Board added the BSRG enrollment questions to its annual survey, BSRG data has covered a very large portion of the higher education universe. With responding institutions representing about three-quarters of all higher education enrollments, very little extrapolation is needed.

Bias in the reported enrollments in the BSRG survey *does* represent a potentially significant issue. Examining the numbers on online students reported to BSRG against the new IPEDS data on the number of distance education students reveals that the BSRG count is often higher than the IPEDS number. What accounts for this difference?

Respondents often do not know the exact number of students enrolled in at least online course, and therefore need to estimate this figure. There is a human tendency to portray things in the best possible light, so if the actual value were 173, for example, we might expect an upward bias in the estimate with 200 being reported more often than 150. Examining BSRG data against the IPEDS data indicates that this is an issue, but does not account for more than a faction of the observed difference.

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. Reporting systems of this caliber have been lacking at most institutions. There is also the possibility of confusion on the part of respondent: they may have provided a total enrollment number instead of the number of unique students. 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.

The bias in the BSRG reported numbers means that the BSRG estimates should not be compared to the estimates of students taking at least one distance education courses in IPEDS. The BSRG 2012 estimate of 7,126,549 students taking at least one online course is too high. The IPEDS number of 5,068,192 students taking at least one distance course is, for other reasons, too low. The truth is somewhere between these two figures, closer to the IPEDS value than the BSRG number.

IPEDS data is not without its problems, but it should now be regarded as the "gold standard" until a better option presents itself.

What is the rate of change in online (distance) enrollments?

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.

With only two years of IPEDS distance enrollment data, there is only one year-to-year change that can be compared to BSRG data. What can be compared is consistent between IPEDS and BSRG both for the overall level of change and for the patterns of that change. Further analysis will be required in further years to verify this one-year result.

COMMENTARY:

IPEDS AS THE NEW DATA SOURCE

Phil Hill, Co-publisher of the e-Literate blog and co-founder of MindWires Consulting
Russ Poulin, Deputy Director-Research & Analysis, WCET (WICHE Cooperative for Educational Technologies)

Introduction

The change in approach by BSRG in using IPEDS as its online learning enrollment data source rather than the previous survey methodology is a welcome change that is the next logical step in developing one set of enrollment counts while lessening the burden on institutions. However, more work needs to be done. The differences between the Babson Survey and IPEDS final enrollment counts (a 1.6 million difference last year[10]) highlights the challenge we have had with inconsistent definitions, manual gathering of data outside of the computer systems designed to collect data, and confusion over which students to include in IPEDS data.

BSRG Commentary

In the previous methodology used by BSRG, both a strength and weakness of the approach was the simple methodology used – ask schools to self-report their online learning enrollment based on 'a course where most or all [80+%] of the content is delivered online; typically have no face-to-face meetings.' This approach was easy to replicate, and the greatest value provided was the provision of trends based on year-to-year comparisons. Thanks to BSRG we have understood the growth rates with a consistent application of the data interpretations. Where people, such as ourselves, have challenged the BSRG data has been in the overall levels – how many online students as an absolute count – but not in the trends – the approximate direction and magnitude of online enrollment growth each year.

IPEDS Commentary

Two great advantages to the including distance education categories in IPEDS are: census collection and data tied to the full set of institutional data already reported to the National Center for Education Statistics.

[10] http://mfeldstein.com/clarification-arent-7-1-million-students-us-taking-least-one-online-class/

IPEDS is required reporting, and schools should be officially tracking the requested data in their student records systems. Not only do all schools have to report (sampling errors and projections to fill incomplete data sets are no longer applicable), we can now track the data in a public format down to the specific institution. This situation enables the analysis of online learning based on home state of the institution, level of study, students residing in a different state than the home campus, retention rates, and total cost of attendance. Best of all, IPEDS is an open database that anyone can access and explore.

The Study

As we both undertook our own analyses on this open data last year[11], we started discovering irregularities. For example, a flagship state university reported no distance enrollments last year. When asked about it, they said that their student record system was not updated in time to report. They reported thousands of students in 2013 that were absent from the 2012 data.

But as we looked further, we found more discrepancies. One entire state system did not report their degree-seeking continuing education online enrollments of more than 50,000 students despite IPEDS instructions to include this category. We were interested in learning if other colleges were having similar problems with reporting distance education enrollments to IPEDS. Terri Taylor Straut (working for WCET) conducted a non-scientific canvassing of 21 colleges from throughout the country whose data seemed unexpectedly high or low.

Through this study, we quickly realized that one recurring issue was confusion over the definition of "distance education." Institutions were very unclear about what activities to include or exclude in their counts. Some used local definitions that varied from the federal expectations.

Ten of the 21 schools from our Summer 2014 study now show changes in their "fully online" enrollments of more than 10 percent as compared to 2012. That strikes us as a high number, as only one case is due to an extremely low starting enrollment. We do not yet know how many cases are due to straightforward enrollment growth and how many are due to changes in reporting approach.

There is a large undercount of distance education students

While only a few institutions reported an undercount, two came from large university systems in populous states that do not report continuing education enrollments despite IPEDS inclusion of that category. Since the same procedures were used within each system, there are close to one hundred thousand students who were not counted in just those two systems.

[11] Cross posted at https://wcetblog.wordpress.com/2014/09/25/ipeds/ and at http://mfeldstein.com/ipeds-investigation-modern-trends/

The IPEDS methodology does not work for innovative programs Because it uses as many as 28 start dates for courses, one institutional respondent estimated that there was approximately a 40% undercount in its reported enrollments. A student completing a full complement of courses in a 15-week period might not be enrolled in all of those courses at the census date. With the increased use of competency-based programs, adaptive learning, and innovations still on the drawing board, it is conceivable that the census dates used by an institution (IPEDS gives some options) might not serve every type of educational offering.

The definition of 'distance education' is causing confusion

It is impossible to get an accurate count of anything if there is not a clear understanding of what should or should not be included in the count. The definition of a "distance education course" from the IPEDS Glossary[12] is:

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.

Even with that definition, colleges faced problems with counting 'blended' or 'hybrid' courses. What percentage of a course needs to be offered at a distance to be counted in the federal report? An institution from Texas reported the need to use different definitions for their accrediting agency (50%), their state (70%), and IPEDS (nearly 100%). It is understandable that colleges want to report the same numbers to all oversight entities.

There is also a large overcount of distance education students

There is also a large overcount from institutions using their own definitions, at least relative to the current IPEDS definition. This raises the question, is the "exclusively" standard imposed by that definition useful in interpreting activity in this mode of instruction?

In addressing the anomalies, IPEDS reporting becomes burdensome or the problems ignored

In decentralized institutions or in institutions with "self-support" units that operate independently from the rest of campus, their data systems are often not connected, leading to incorrect or inconsistent manual consolidation of data.

[12] http://nces.ed.gov/ipeds/glossary/?charindex=D

What Does This Mean?

Some of the problems are based on the new requirements and will be corrected over time as institutions review their own data and correct mistakes.

Even with these corrections, however, there is quite simply a lot of noise in the system, and we should take care to note these error levels. While our study was a spot check rather than extensive research, the noise levels include specific cases of 20,000 or even 50,000 students misclassified. This implies total noise levels on the order of at least 100,000 enrollments. We commend the effort of BSRG in providing a sample survey in parallel to the IPEDS analysis to test out some of the conclusions.

The higher education community needs to have reasonably consistent definitions in this age of reporting and accountability. Since everyone is content with their own process, it might be time to engage the accrediting community to help raise the question to the level of a serious policy issue worthy of further consideration. With their leadership, we may be able to develop definitions that meet data reporting needs in the short term, while providing flexibility for innovations in the long term.

TABLES

Who Offers Online (Distance) Courses?

INSTITUTION HAS DISTANCE STUDENTS BY OVERALL ENROLLMENT – 2013

	Yes	*No*
Under 1,000	47.5%	52.5%
1,000 - 4,999	83.6%	16.4%
5,000 - 9,999	95.7%	4.3%
10,000 - 19,999	98.3%	1.7%
20,000 +	99.6%	0.4%

INSTITUTION HAS DISTANCE STUDENTS BY OVERALL ENROLLMENT IPEDS AND BSRG – 2013

	IPEDS	*BSRG*
Under 1,000	47.5%	81.2%
1,000 - 4,999	83.6%	88.6%
5,000 - 9,999	95.7%	96.4%
10,000 - 19,999	98.3%	98.6%
20,000 +	99.6%	100.0%

INSTITUTION HAS DISTANCE STUDENTS BY LEVEL OF INSTITUTION – 2013

	Yes	*No*
Four or more years	71.6%	28.4%
At least 2 but less than 4 years	68.3%	31.7%

INSTITUTION HAS DISTANCE STUDENTS BY CONTROL – 2013

	Yes	*No*
Public	95.5%	4.5%
Private not-for-profit	63.7%	36.3%
Private for-profit	50.2%	49.8%

INSTITUTION HAS DISTANCE STUDENTS BY CONTROL AND LEVEL OF INSTITUTION – 2013

	Yes	*No*
Public, 4-year	93.4%	6.6%
Private not-for-profit, 4-year	65.3%	34.7%
Private for-profit, 4-year	65.1%	34.9%
Public, 2-year	97.0%	3.0%
Private not-for-profit, 2-year	34.1%	65.9%
Private for-profit, 2-year	33.6%	66.4%

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

TOTAL STUDENTS ENROLLED IN A DISTANCE EDUCATION COURSE – 2012 AND 2013

	2013	*2012*	*Change*	*Percent Change*
Public	3,750,745	3,584,745	166,000	4.6%
Private not-for-profit	770,219	684,030	86,189	12.6%
Private for-profit	736,415	799,417	-63,002	-7.9%

TOTAL STUDENTS ENROLLED IN A DISTANCE EDUCATION COURSE

	2013	*2012*	*Change*	*Percent Change*
Public, 4-year or above	1,882,175	1,755,351	126,824	7.2%
Private not-for-profit, 4-year or above	768,199	681,388	86,811	12.7%
Private for-profit, 4-year or above	701,223	767,823	-66,600	-8.7%
Public, 2-year	1,868,570	1,829,394	39,176	2.1%
Private not-for-profit, 2-year	2,020	2642	-622	-23.5%
Private for-profit, 2-year	35,192	31,594	3,598	11.4%

GROWTH RATE OF NUMBER OF STUDENTS TAKING AT LEAST ONE ONLINE/DISTANCE COURSE – 2003 TO 2013

Fall 2003	23.0%
Fall 2004	18.2%
Fall 2005	36.5%
Fall 2006	9.7%
Fall 2007	12.9%
Fall 2008	16.9%
Fall 2009	21.1%
Fall 2010	10.1%
Fall 2011	9.3%
Fall 2012	6.1%
Fall 2013	3.7%

Is Online Learning Strategic?

Online Education is Critical to the Long-term Strategy of My Institution – 2002 to 2014

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

	Fall 2009	*Fall 2010*	*Fall 2011*	*Fall 2012*	*Fall 2013*	*Fall 2014*
Agree	59.2%	63.1%	65.5%	69.1%	65.9%	70.8%
Neutral	25.9%	24.6%	21.0%	19.7%	24.3%	20.6%
Disagree	14.9%	12.3%	13.5%	11.2%	9.7%	8.6%

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%

Online Education is Critical to the Long-term Strategy by Overall Enrollment – 2012 to 2014

	Under 1500	*1500 - 2999*	*3000 - 7499*	*7500 - 14999*	*15000+*
2012	60.0%	69.2%	83.4%	74.7%	80.1%
2013	61.9%	59.3%	73.4%	74.9%	73.8%
2014	70.2%	63.9%	69.4%	79.5%	71.0%

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

	Private for-profit	*Private not-for-profit*	*Public*
In plan	63.4%	40.9%	42.4%
Not in plan	17.5%	23.5%	30.6%

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

Learning Outcomes in Online Education Compared to Face-to-face – 2003 to 2014

	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*
Superior	2.7%	3.7%	4.7%	4.5%
Somewhat superior	13.8%	16.8%	15.3%	11.7%
Same	51.1%	56.4%	54.1%	57.9%
Somewhat inferior	22.7%	17.7%	18.2%	18.1%
Inferior	9.7%	5.3%	7.7%	7.8%

Learning Outcomes in Online Education Compared to Face-to-face – 2014

	No Distance Courses	*Offer Distance Courses*	*Overall*
Superior	1.8%	5.0%	4.5%
Somewhat superior	11.5%	11.6%	11.7%
Same	39.1%	62.2%	57.9%
Somewhat inferior	28.3%	16.1%	18.1%
Inferior	19.3%	5.1%	7.8%

Learning Outcomes for Online and Blended Courses Compared to Face-to-face - 2014

	Online Courses	*Blended Courses*
Superior	4.5%	7.9%
Somewhat superior	11.7%	25.0%
Same	57.9%	56.6%
Somewhat inferior	18.1%	9.2%
Inferior	7.8%	1.4%

Learning Outcomes in Blended/Hybrid Course Compared to Face-to-face – 2012 to 2014

	2012	*2013*	*2014*
Superior	7.9%	9.1%	7.9%
Somewhat superior	29.0%	26.8%	25.0%
Same	54.7%	56.2%	56.6%
Somewhat inferior	8.1%	7.2%	9.2%
Inferior	.3%	.7%	1.4%

Faculty Acceptance of Online Education

Faculty at My School Accept the Value and Legitimacy of Online Education – 2002 to 2014

	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*
Agree	30.9%	32.0%	30.2%	28.0%
Neutral	51.8%	56.5%	57.2%	58.2%
Disagree	17.3%	11.4%	12.6%	13.8%

Faculty at My School Accept the Value and Legitimacy of Online Education – 2014

	Courses and full programs	*Courses only*	*No offerings*
Agree	35.6%	20.6%	8.7%
Neutral	57.0%	69.6%	59.5%
Disagree	7.3%	9.8%	31.7%

Faculty at My School Accept the Value and Legitimacy of Online Education – 2014

	Private for-profit	*Private not-for-profit*	*Public*
Agree	29.5%	22.4%	31.9%
Neutral	60.1%	60.4%	56.6%
Disagree	10.4%	17.2%	11.6%

Importance of Lack of Acceptance of Online Instruction by Faculty is a Barrier to Adoption of Online – 2007, 2012, and 2014

	Important	*Very Important*
2007	36.9%	24.2%
2012	41.2%	25.6%
2014	29.3%	27.3%

Do Students Require More Discipline to Complete Online Courses?

Students Need More Discipline to Succeed in an Online Course Than in a Face-to-face Course – 2014

	Private for-profit	*Private not-for-profit*	*Public*
2005	72.6%	56.0%	71.5%
2013	77.0%	63.3%	70.1%
2014	62.0%	69.4%	69.7%

Students Need More Discipline to Succeed in an Online Course Than in a Face-to-face Course – 2014

	No Distance Courses	*Offer Distance Courses*
Agree	59.0%	70.9%
Neutral	33.7%	23.2%
Disagree	7.3%	5.9%

Importance of Students Needing More Discipline to Succeed in an Online Course as a Barrier to Adoption of Online – 2007, 2008, 2012, and 2014

	Important	*Very Important*
2007	42.2%	38.3%
2008	44.3%	39.1%
2012	41.2%	47.7%
2014	42.6%	29.4%

Is Retention of Students Harder in Online Courses?

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES – 2004, 2009, 2013 AND 2014

2004	27.2%
2009	28.4%
2013	40.6%
2014	44.6%

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES – 2014

	No Distance Courses	*Offer Distance Courses*
Agree	42.8%	45.1%
Neutral	51.5%	43.6%
Disagree	5.7%	11.3%

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES – 2014

	Private for-profit	*Private not-for-profit*	*Public*
Agree	51.3%	42.1%	43.6%
Neutral	37.7%	48.7%	45.0%
Disagree	10.9%	9.2%	11.4%

IMPORTANCE OF LOWER RETENTION RATES IN ONLINE COURSES AS A BARRIER TO ADOPTION OF ONLINE – 2007, 2008, 2012, AND 2014

	Important	*Very Important*
2007	35.1%	21.0%
2008	42.1%	19.8%
2012	44.7%	28.8%
2014	43.8%	21.5%

Barriers to the Growth of Online Education

Importance of Additional Faculty Effort Required to Deliver Online Courses as a Barrier to Adoption of Online – 2008, 2012, and 2014

	Important	*Very Important*
2008	42.2%	34.1%
2012	43.5%	34.5%
2014	41.0%	36.9%

Additional Faculty Effort Required to Deliver Online Courses is a Barrier to Adoption of Online – 2014

	Private for-profit	*Private not-for-profit*	*Public*
Important	25.3%	40.5%	44.9%
Very Important	52.3%	36.7%	33.3%
Somewhat Important	21.2%	17.8%	17.7%
Not Important	1.2%	5.0%	4.0%

Importance of Lack of Acceptance of Online Degrees by Potential Employers as a Barrier to Adoption of Online – 2007, 2008, 2012, and 2014

	Important	*Very Important*
2007	27.8%	11.7%
2008	31.0%	11.8%
2012	31.3%	11.5%
2014	25.2%	12.3%

Importance of Lack of Acceptance of Online Degrees by Potential Employers as a Barrier to Adoption of Online – 2014

	Private for-profit	*Private not-for-profit*	*Public*
Important	25.1%	26.8%	23.2%
Very Important	22.1%	10.6%	9.7%
Somewhat Important	33.0%	38.8%	39.2%
Not Important	19.8%	23.8%	28.0%

Open Educational Resources

Faculty Awareness of Open Educational Resources – 2014

Very Aware	*Aware*	*Somewhat Aware*	*Not Aware*
5.1%	15.2%	13.8%	65.9%

Academic Leader Awareness of Open Educational Resources – 2014

Very Aware	*Aware*	*Somewhat Aware*	*Not Aware*
26.0%	30.0%	23.9%	20.1%

Awareness of Creative Commons Licensing – 2014

	Very Aware	*Aware*	*Somewhat Aware*	*Unaware*
Faculty	13.5%	22.9%	28.0%	35.6%
Academic leader	45.0%	41.7%	10.9%	2.4%

Faculty Awareness of Open Educational Resources and Creative Commons – 2014

Very Aware	*Aware*	*Somewhat Aware*	*Not Aware*
4.6%	11.9%	9.9%	73.6%

Academic Leader Awareness of Open Educational Resources and Creative Commons – 2014

Very Aware	*Aware*	*Somewhat Aware*	*Not Aware*
23.2%	25.7%	18.5%	32.5%

Massive Open Online Courses (MOOCS)

STATUS OF MOOC OFFERINGS – 2012, 2013, AND 2014

	2012	*2013*	*2014*
Have a MOOC	2.6%	5.0%	8.0%
Planning a MOOC	9.4%	9.3%	5.6%

STATUS OF MOOC OFFERINGS – 2012, 2013, AND 2014

	2012	*2013*	*2014*
No Plans	33.7%	33.0%	46.5%
Not Decided	54.2%	52.7%	39.9%

PRIMARY OBJECTIVE FOR YOUR INSTITUTION'S MOOC – 2013

	2013	*2014*
Generate Income	.4%	3.8%
Explore Cost Reductions	2.0%	2.4%
Supplement On-campus	3.6%	4.9%
Reach New Students	5.8%	4.8%
Flexible Learning Opportunities	17.2%	13.5%
Innovative Pedagogy	18.0%	18.7%
Drive Student Recruitment	20.0%	17.8%
Increase Institution Visibility	27.2%	26.6%

MOOCS ARE A SUSTAINABLE METHOD FOR OFFERING COURSES –2012, 2013 AND 2014

	2012	*2013*	*2014*
Disagree	26.2%	38.5%	50.8%
Neutral	45.4%	38.3%	32.9%
Agree	28.3%	23.2%	16.3%

MOOCS ARE IMPORTANT FOR INSTITUTIONS TO LEARN ABOUT ONLINE PEDAGOGY – 2012, 2013 AND 2014

	2012	*2013*	*2014*
Agree	49.8%	44.0%	27.9%
Neutral	31.7%	28.8%	34.9%
Disagree	18.5%	27.2%	37.3%

What Will Drive the Future of Higher Education?

FACTORS WITH THE GREATEST IMPACT ON THE FUTURE OF HIGHER EDUCATION – 2014

	Most important	*Second most important*	*Third most important*
Cost / Student indebtedness	38.8%	22.9%	15.1%
Workforce development/ Gainful employment	20.4%	21.8%	22.1%
Assessment of learning outcomes	12.8%	18.2%	15.9%
Competency-based education	13.8%	14.6%	18.5%
Improved student retention	10.5%	16.0%	13.0%
Self-directed learning	4.1%	5.1%	11.6%

COST / STUDENT INDEBTEDNESS WILL HAVE THE GREATEST IMPACT ON THE FUTURE OF HIGHER EDUCATION – 2014

	Private for-profit	*Private not-for-profit*	*Public*
Most important	25.3%	40.7%	36.7%
Second most important	26.9%	27.5%	19.2%
Third most important	15.2%	16.7%	17.3%

WORKFORCE DEVELOPMENT/ GAINFUL EMPLOYMENT WILL HAVE THE GREATEST IMPACT ON THE FUTURE OF HIGHER EDUCATION – 2014

	Private for-profit	*Private not-for-profit*	*Public*
Most important	23.9%	21.2%	18.1%
Second most important	18.3%	24.1%	21.5%
Third most important	25.1%	19.8%	22.9%

PARTNERS

Over the years it has become increasingly important for those of us working in higher education to explore the exciting opportunities new technologies bring to institutions, educators and students. As the world's leading learning company, Pearson is acutely aware of how important it is to understand the online learning landscape, the opportunities it offers to higher education, and how its adoption can evolve—and is evolving—teaching and learning. Pearson's ongoing collaboration with thought leaders from such organizations as the Babson Survey Research Group and the Online Learning Consortium is enabling us to strengthen that understanding.

Pearson's goal is to empower institutions to produce better results for learners through effective use of educational technology and resources, and to prepare students to compete successfully in an ever-changing global economy. The more we know about online learning, the faster we can adopt these new practices, facilitate their proliferation across higher education, and increase student success. Pearson is on a path to efficacy, with a commitment to measurable and improved learner outcomes worldwide.

We look forward establishing the next wave of online learning best practices together.

For more information about Pearson's online learning services, visit www.pearsononlinelearning.com

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The Online Learning Consortium (OLC) is the leading professional organization devoted to advancing quality online learning by providing professional development, instruction, best practice publications and guidance to educators, online learning professionals and organizations around the world. OLC is a key factor in the transformation of the e-Education field. Through our conferences, quality learning opportunities, and tools for individual and institutional success we have been a part of this swift growth.

The real value of belonging to OLC is being part of a global community. Membership in OLC means belonging to a community of hundreds of institutions and corporations in over 14 countries dedicated toward advancing best practices in online learning. Specifically, membership in the organization provides institutions and corporations with faculty training, improvement of institutional ROI, leadership development, and access to subject matter experts (SMEs). Individuals can benefit from recognized leader affiliation, training by industry experts, networking with community and colleagues, access to scholarly information, and professional development. Visit our Website: http://onlinelearningconsortium.org

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The Babson Survey Research Group conducts regional, national, and international research, including survey design, sampling methodology, data integrity, statistical analyses and reporting.

National Surveys of Online Education

- 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 the Curriculum: Open Educational Resources in U.S. Higher Education, 2014
- Growing the Curriculum: Open Educational Resources in U.S. Higher Education, 2012

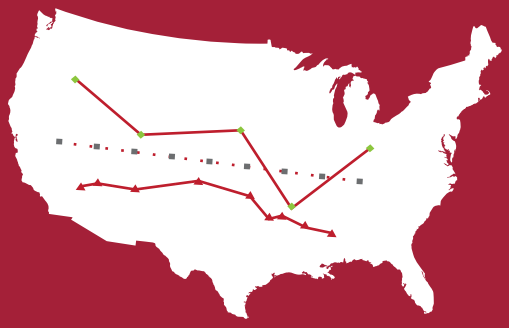
The APLU-Sloan National Commission on Online Learning

- Online Learning as a Strategic Asset, Volume II: The Paradox of Faculty Voices: Views and Experiences with Online Learning
- Online Learning as a Strategic Asset: A Survey of APLU Presidents and Chancellors
- Online Learning as a Strategic Asset: A Survey of NAFEO Presidents and Chancellors
- Online Learning as a Strategic Asset: A Survey of AIHEC Tribal College and University

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

http://www.onlinelearningsurvey.com/



Grade Level - Tracking Online Education in the United State is the twelfth 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 data collection conducted in partnership with the College Board and additional data from the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS). Using survey responses from more than 2,800 colleges and universities and IPEDS data for 4,891, this study is aimed at answering fundamental questions about the nature and extent of online education.

Who Offers Online (Distance) Courses?

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

Is Online Learning Strategic?

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

Faculty Acceptance of Online Education

Do Students Require More Discipline to Complete Online Courses?

Is Retention of Students Harder in Online Courses?

Barriers to the Growth of Online Education

Open Educational Resources

Massive Open Online Courses (MOOCs)

What Will Drive the Future of Higher Education?

The survey analysis is based on a comprehensive sample of active, degree-granting institutions of higher education in the United States.

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