BABSON Survey Research Group

# Going the Distance:

## Online Education in the United States 2011

I. Elaine Allen and Jeff Seaman

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# Going the Distance

## Online Education in the United States, 2011

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November 2011

The cover design is by Mark Favazza (www.favazza.com).

# Contents

# ACKNOWLEDGEMENTS

This publication, *Going the Distance: Online Education in the United States, 2011*, marks an important milestone. For the past eight years this report series has been called the Sloan Online Survey in recognition of the support from the Alfred P. Sloan Foundation. Ralph Gomory, now President Emeritus of the Sloan Foundation and A. Frank Mayadas, currently Senior Advisor to the Sloan Foundation, recognized the potential for this kind of research with an initial grant in 2002. Their continuing support through grant renewals allowed us to design and conduct independent studies, provide respondents with full privacy, and to distribute all reports without charge to the higher education community. We thank them for this.

Several organizations have stepped in to support the continuation of this report series:

- Kaplan University – offering both face-to-face and online programs, they have supported our analyses into the aspects that make online education unique.
- The Sloan Consortium -- one of the first professional organizations in online education and our report distributor for the past eight years.
- Inside Higher Ed – provides consistently thorough analysis of current topics in higher education and valuable guidance on which issues are the most critical.
- Pearson – has brought a wide array of experience in publishing and higher education to the project; they are directly supporting eBook report production.

These organizations also recognized the importance of an unbiased and independent survey and report. This year's study retains the same degree of independence and autonomy as previous, with survey respondents enjoying the same level of privacy this year as they have for all previous surveys.

We also wish to thank The William and Flora Hewlett Foundation for their considerable assistance in the area of Open Education Resources (OER). The survey questions, analysis, and resulting report section on OER is only possible because of the expertise and advice that they have provided for this endeavor.

Our data collection partnership with the College Board has been critical for the ability to expand the scope and coverage of these reports. By including our online enrollment questions in their Annual Survey of Colleges, they allow us to reach many more schools.

Finally we want to thank the thousands of respondents who took the time to provide us with such detailed and thoughtful responses. We understand that you are very busy people, so we very much appreciate your effort. This report would not be possible without you, and we hope that you find it useful.

I. Elaine Allen

Co-Directors
Babson Survey Research Group
November 2011

# Partners

### Pearson

Pearson has brought their specific expertise to this project and will be producing eBook versions of this report and an Infographic highlighting the results.

*Pearson, the world's leading learning company, has global reach and market-leading businesses in education, business information and consumer publishing. The company provides innovative print and digital education materials, including personalized learning programs such as MyLab and Mastering; educational services including custom publishing; and content-independent platforms including the EQUELLA digital repository and Pearson LearningStudio for online learning programs.*

### Kaplan University

*Kaplan University offers a different school of thought for higher education. It strives to help adult students unlock their talent by providing a practical, student-centered education that prepares them for careers in some of the fastest-growing industries. The University, which has its main campus in Davenport, Iowa, and its headquarters in Chicago, is accredited by The Higher Learning Commission (www.ncahlc.org) and is a member of the North Central Association of Colleges and Schools. Kaplan University serves more than 53,000 online and campus-based students. The University has 11 campuses in Iowa, Nebraska, Maryland and Maine, and Kaplan University Learning Centers in Maryland, Wisconsin, Indiana, Missouri and Florida.*

### The Sloan Consortium

The Sloan Consortium (Sloan-C) is a long-time supporter and distributor of the national online learning reports in this series for the past eight years.

*The Sloan Consortium is an institutional and professional leadership organization dedicated to integrating online education into the mainstream of higher education, helping institutions and individual educators improve the quality, scale, and breadth of education. Originally funded by the Alfred P. Sloan Foundation, Sloan-C is now a non-profit, member sustained organization.*

The study design, survey administration, analysis and report production for this series of online learning survey reports are the sole responsibility of the Babson Survey Research Group. No individual-level data is shared with partner organizations.

**The College Board**

This report would not be possible without the continued assistance of the College Board. The data collection partnership that they have embraced not only provides higher quality data for analysis, but also makes it easier for respondents by allowing them to respond to a single survey instead of two.

*The College Board is a not-for-profit membership association whose mission is to connect students to college success and opportunity. Founded in 1900, the association is composed of more than 5,400 schools, colleges, universities, and other educational organizations.*

**Inside Higher Ed**

This report represents the first of a series of joint Babson Survey Research Group-Inside Higher Ed survey research reports.

*Inside Higher Ed (http://insidehighered.com) is the leading source of free news, opinion, blogs and jobs for all of higher education. More than 900,000 unique visitors flock to its website each month for breaking news and feature stories, provocative daily commentary, areas for comment on every article, practical career columns, and a powerful suite of tools to help higher education professionals get jobs and colleges identify and hire employees.*

**The William and Flora Hewlett Foundation**

The William and Flora Hewlett Foundation have provided considerable assistance in the area of Open Education Resources (OER). The survey questions, analysis, and resulting report section on OER is only possible because of their help.

*The William and Flora Hewlett Foundation has been making grants since 1967 to help solve social and environmental problems at home and around the world. The Foundation concentrates its resources on activities in education, the environment, global development and population, performing arts, and philanthropy, and makes grants to support disadvantaged communities in the San Francisco Bay Area.*

**Alfred P. Sloan Foundation**

The Alfred P. Sloan Foundation is the founding sponsor of this report series. The authors wish to thank them for their support over the past eight years.

*The Alfred P. Sloan Foundation makes grants in science, technology and the quality of American life. It's Anytime, Anyplace Learning program seeks to make high quality learning, education and training available anytime and anywhere.*

# EXECUTIVE SUMMARY

*Going the Distance: Online Education in the United States, 2011* is the ninth 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. Data collection is conducted in partnership with the College Board. This year's study, like those for the previous eight years, is aimed at answering fundamental questions about the nature and extent of online education. Based on responses from more than 2,500 colleges and universities, the study addresses:

## IS ONLINE LEARNING STRATEGIC?

Background: Last year's report noted that the proportion of institutions that see online education as a critical component of their long-term strategy once again increased. Does this trend continue for 2011?

The evidence: After remaining steady for several years, the proportion of chief academic officers saying that online education is critical to their long-term strategy took an upward turn in both 2010 and 2011.

- Sixty-five percent of all reporting institutions said that online learning was a critical part of their long-term strategy, a small increase from sixty-three percent in 2010.
- The year-to-year change was greatest among the for-profit institutions, which increased from fifty-one percent agreeing in 2009 to sixty-nine percent in 2011.
- For-profit institutions are the most likely to have included online learning as a part of their strategic plan.

## HOW MANY STUDENTS ARE LEARNING ONLINE?

Background: For the past eight years online enrollments have been growing substantially faster than overall higher education enrollments. Last year the results showed the first signs that this unbridled growth might be slowing. What do the numbers for this year reveal?

The evidence: The rate of growth of online enrollments has tempered somewhat, but continues to be far in excess of the rate for the total higher education student population.

- Over 6.1 million students were taking at least one online course during the fall 2010 term; an increase of 560,000 students over the number reported the previous year.
- The ten percent growth rate for online enrollments is the second lowest since 2002.
- The ten percent growth rate for online enrollments far exceeds the less than one percent growth of the overall higher education student population.
- Thirty-one percent of all higher education students now take at least one course online.

## ARE LEARNING OUTCOMES IN ONLINE COMPARABLE TO FACE-TO-FACE?

Background: The reports in this series have consistently found that most chief academic officers rate the learning outcomes for online education “as good as or better” than those for face-to-face instruction, but a consistent and sizable minority consider online to be inferior. Do academic leaders still hold the same opinion, given the rapid growth in the numbers of online students?

The evidence: The 2011 results show little change in the perception of the relative quality of online instruction as compared to face-to-face.

- In the first report of this series in 2003, fifty-seven percent of academic leaders rated the learning outcomes in online education as the same or superior to those in face-to-face. That number is now sixty-seven percent, a small but noteworthy increase.
- One-third of all academic leaders continue to believe that the learning outcomes for online education are inferior to those of face-to-face instruction.
- Academic leaders at institutions with online offerings have a much more favorable opinion of the relative learning outcomes for online courses than do those at institutions with no online courses or programs.

## HAS FACULTY ACCEPTANCE OF ONLINE INCREASED?

Background: The perception of chief academic officers of the level of faculty acceptance of online teaching and learning has changed little in the last eight years.

The evidence: While the number of programs and courses online continue to grow, the acceptance of this learning modality by faculty has been relatively constant since first measured in 2003.

- Less than one-third of chief academic officers believe that their faculty accept the value and legitimacy of online education. This percent has changed little over the last eight years.
- The proportion of chief academic officers that report their faculty accept online education varies widely by type of school.

## What Training Do Faculty Receive for Teaching Online?

Background: For faculty teaching online the type of pedagogy used may differ significantly from face-to-face classes. The growth of online courses and programs has increased the need for faculty to become comfortable with online teaching and gain the necessary skills to make online courses a success.

The evidence: There is no single approach being taken by institutions in providing training for their teaching faculty. Most institutions use a combination of mentoring and training options.

- Only six percent of institutions with online offerings report that they have no training or mentoring programs for their online teaching faculty.
- The most common training approaches for online faculty are internally run training courses (72 percent) and informal mentoring (58 percent).
- Smaller institutions are more likely to look outside the institution for their training than are larger institutions.

## What is the Future for Online Enrollment Growth?

Background: The continued unbridled growth in online enrollments cannot continue forever - at some point we believe higher education institutions will reach a saturation point. Evidence from last year provided some signs, albeit slight, that there might be some clouds on the horizon for future online enrollment growth in some disciplines.

The evidence: Once again, there is no compelling evidence that the continued robust growth in online enrollments is at its end. However, not all program areas are seeing the same levels of growth.

- Reported year-to-year enrollment changes for fully online programs by discipline show most are growing, but sizable portions are seeing steady enrollments.
- Private for-profit institutions have the largest proportion of online programs showing declining or steady enrollment.

# What is Online Learning?

The focus of this report is online education. To maintain consistency we use the same definitions as in our eight prior national reports. These definitions were presented to the respondents at the beginning of the survey and then repeated in the body of individual questions where appropriate.

Online courses are those in which at least 80 percent of the course content is delivered online. Face-to-face instruction includes courses in which zero to 29 percent of the content is delivered online; this category includes both traditional and web facilitated courses. The remaining alternative, blended (sometimes called hybrid) instruction has between 30 and 80 percent of the course content delivered online. While the survey asked respondents for information on all types of courses, the current report is devoted to only online learning.

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 course management system (CMS) 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. |

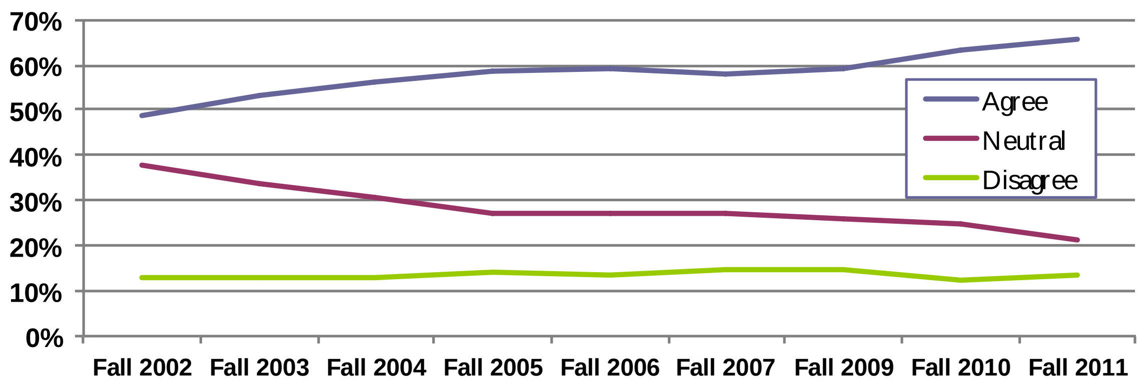
Schools may offer online learning in a variety of ways. The survey asked respondents to characterize their face-to-face, blended, and online learning by the level of the course (undergraduate, graduate, non-credit, etc.). Similarly, respondents were asked to characterize their face-to-face, blended,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

# Detailed Survey Findings

## Is Online Learning Strategic?

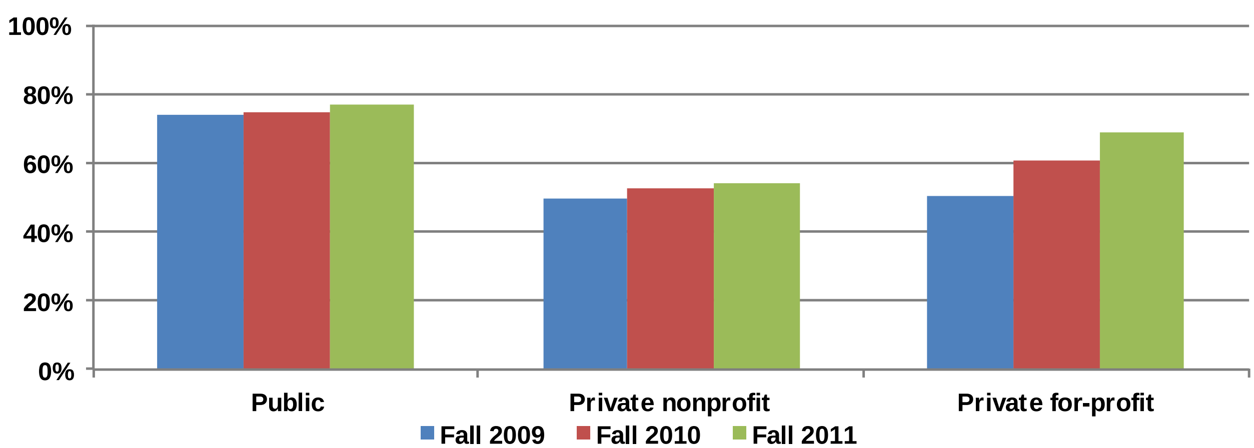
After remaining steady for a number of years, the proportion of chief academic officers saying that online education is critical to their long-term strategy took a small upward turn last year. That trend continues this year as well. The percentage of institutions that agree "Online education is critical to the long-term strategy of my institution" reached its highest level in 2011 (65.5%). The percent disagreeing has held steady at just over ten percent for all nine years of the survey.

**Online Education is Critical to the Long-term Strategy of my Institution – Fall 2002 to Fall 2011**




What types of institutions are leading to the increase in the proportion that believes that online education is critical to their long-term strategy? Has there been an overall increase across all types of institutions, or is this due to one particular segment of the higher education universe recording a substantial increase in this view? Results presented last year indicated that the overall change was being driven largely by the for-profit sector.

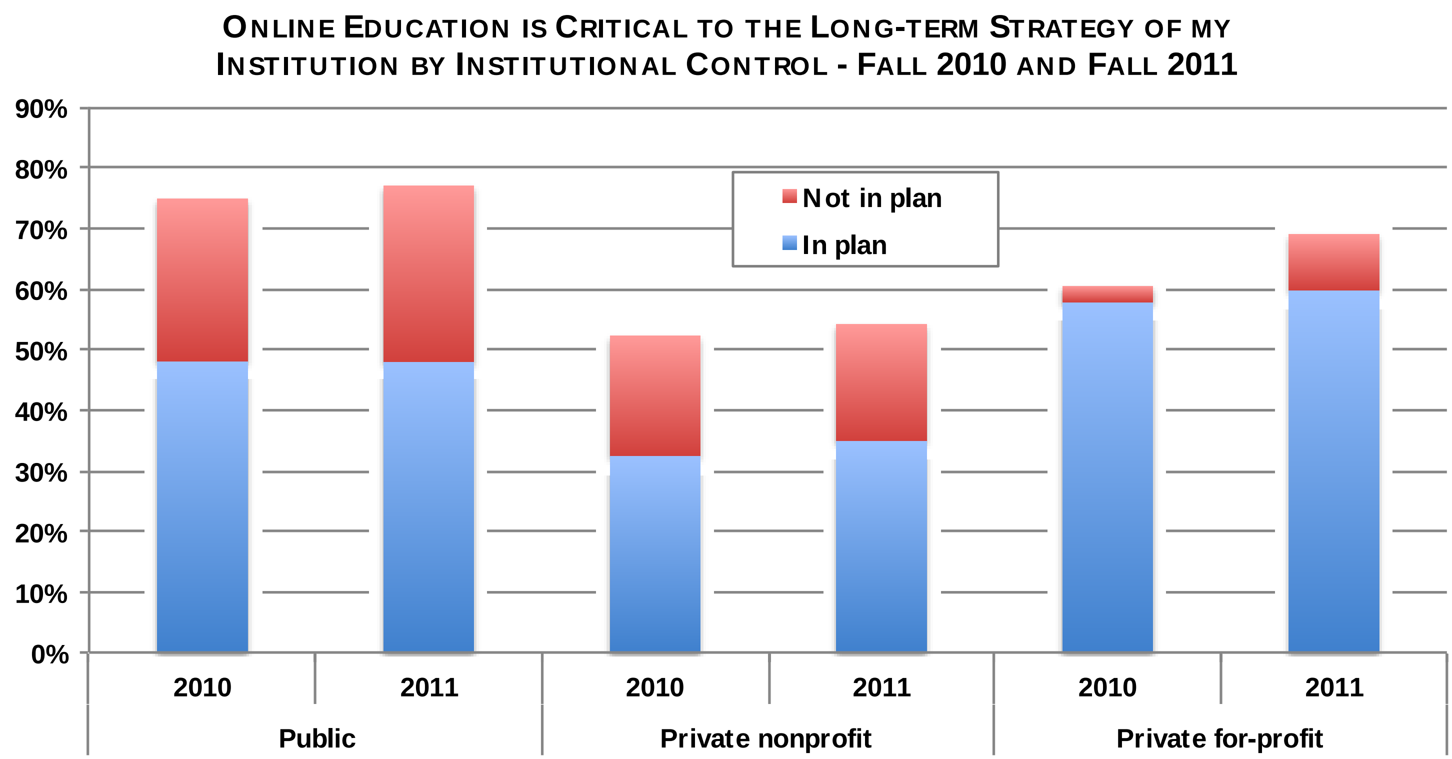
**Online Education is Critical to the Long-term Strategy of my Institution by Institutional Control, Percent Agreeing – Fall 2009 to Fall 2011**



Comparing the results from 2011 with those from 2009 and 2010 demonstrates that it is once again the private for-profit institutions that are driving this change. Both the public and the private nonprofit institutions show a small increase each year in the percentage reporting that online is critical to their long-term strategy. The percentage change for the private for-profit institutions (50.7% in 2009, 60.5% in 2010, and 69.1% in 2011) represents a far greater increase (both in absolute and relative terms) than seen in all other types of institutions.

Do all the institutions that profess that online education is critical also include online as a component of their strategic plan? Is there a "gap" between those who profess that online is critical and those that have specifically included online within their strategic plan? Previous reports in this series have shown that such a gap does exist for a number of institutions, and this year is no different. The Babson Survey Research Group conducted three surveys of presidents and chancellors for the A♦P♦L♦U[1]-Sloan National Commission on Online Learning, which found that:

> All three surveys of campus leaders revealed a striking gap: Close to, or *more than two-thirds* of the responding CEOs recognized that *online programs are strategically important to the institution*, yet close to, or *less than one-half of respondents actually included online programs in the campus strategic plan*. This gap exists even at a time when the number of students taking at least one online course continues to expand at a rate far in excess of the growth of overall higher education enrollments.[2] (Emphasis original)

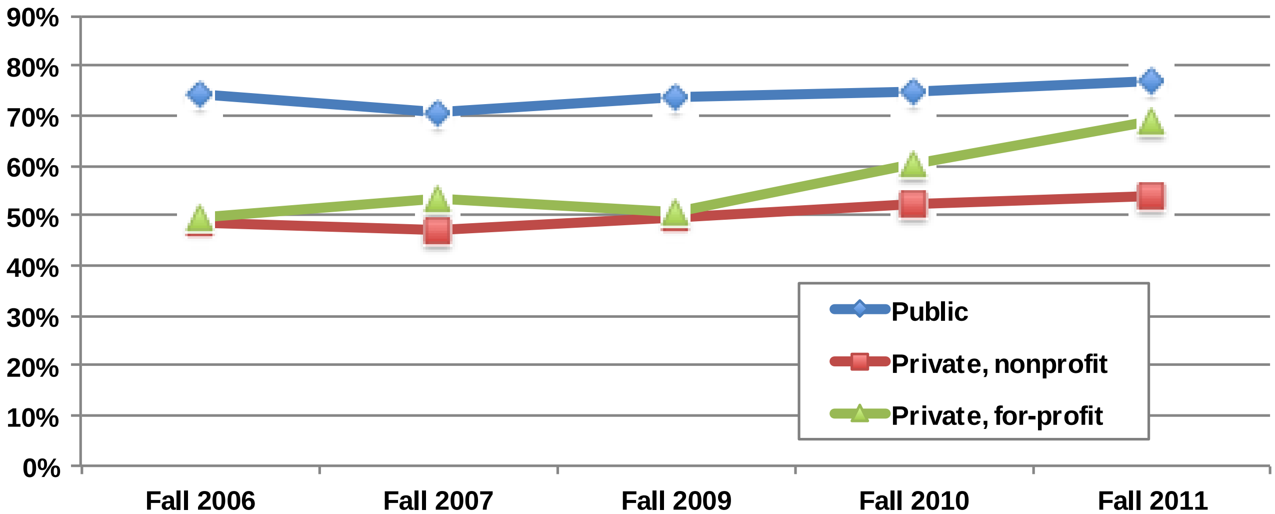



[1] The Association of Public and Land-grant Universities

[2] http://www.aplu.org/NetCommunity/Document.Doc?id=1877

The results for last year indicated that private for-profit institutions were the only ones not to suffer from this "gap." The results for 2011 continue to show that the for-profit institutions have the smallest "gap", but the pattern has changed from previous years.

### Online Education is Critical to the Long-term Strategy of my Institution by Institutional Control - Fall 2006 to Fall 2011




This year's results show that not only have for-profit institutions once again made the largest gains in the number reporting that online is critical to their long-term strategy, but they remain the leader among institutions in including online in their strategic plan. However, the increase in the proportion saying online is critical is not matched by an equal increase of those saying this online has been included in their strategic plan. The percent of for-profit institutions who report that online is critical to their long term strategy grew by almost 9 percent (60.5% in 2010 to 69.1% for 2011), while the percentage that have included online in their plan increased by only 2 percent (57.8% in 2010 to 59.8% in 2011).

Is what we are seeing just the natural delay of having the plans catch up with the intention? When we poll these same institutions in the next few years will they have completed their planning process and fully included online into their long-term plan? Once these institutions have revised their long-term plans will the pattern among the for-profit sector match that we previously observed, with virtually all institutions incorporating online into their long-term plan, or will they be closer to the rest of higher education and exhibit a large gap between those that profess that online is critical and those that have incorporated online into their long-term plan? We will continue track this.

## How Many Students are Learning Online?

Every year since the first report in this series in 2003 the number of students taking at least one online course has increased at a rate far in excess of the growth for the overall higher education student body. This year is no different. The most recent estimate, for fall 2010, shows an increase of ten percent over fall 2009 to a total of 6.1 million online students. The growth from 1.6 million students taking at least one online course in fall 2002 to the 6.1 million for fall 2010 translates into a compound annual growth rate of 18.3 percent for this time period. For comparison, the overall higher education student body has grown at an annual rate of just over two percent during this same period – from 16.6 million in fall 2002 to 19.6 million for fall 2010[3].

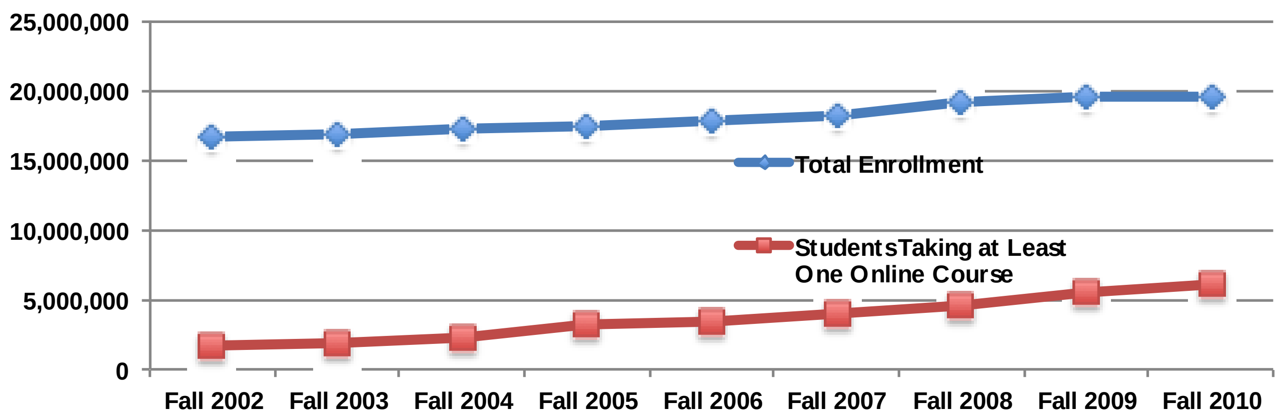
**TOTAL AND ONLINE ENROLLMENT IN DEGREE-GRANTING POSTSECONDARY INSTITUTIONS – FALL 2002 THROUGH FALL 2010**

| | Total Enrollment | Annual Growth Rate Total Enrollment | Students Taking at Least One Online Course | Online Enrollment Increase over Previous Year | Annual Growth Rate Online Enrollment | Online Enrollment as a Percent of Total Enrollment |
|---|---|---|---|---|---|---|
| **Fall 2002** | 16,611,710 | NA | 1,602,970 | NA | NA | 9.6% |
| **Fall 2003** | 16,911,481 | 1.8% | 1,971,397 | 368,427 | 23.0% | 11.7% |
| **Fall 2004** | 17,272,043 | 2.1% | 2,329,783 | 358,386 | 18.2% | 13.5% |
| **Fall 2005** | 17,487,481 | 1.2% | 3,180,050 | 850,267 | 36.5% | 18.2% |
| **Fall 2006** | 17,758,872 | 1.6% | 3,488,381 | 308,331 | 9.7% | 19.6% |
| **Fall 2007** | 18,248,133 | 2.8% | 3,938,111 | 449,730 | 12.9% | 21.6% |
| **Fall 2008** | 19,102,811 | 4.7% | 4,606,353 | 668,242 | 16.9% | 24.1% |
| **Fall 2009** | 19,524,750 | 2.2% | 5,579,022 | 972,669 | 21.1% | 28.6% |
| **Fall 2010** | 19,641,140 | 0.6% | 6,142,280 | 563,258 | 10.1% | 31.3% |

The increase this year of over one-half million students taking at least one online course, while substantial, is only about one-half the gain recorded over the previous year. Likewise, the percentage increase over the previous year is second lowest recorded since 2002. While lower than previous years, a growth rate of over ten percent on the larger current base of students is still substantial. Coming on a much larger base, the current growth of ten percent produces an increase similar in size to what we experienced with higher growth rates in past years. The slower rate of growth in the number of students taking at least one online course as compared to previous years may be the first sign that the upward rise in online enrollments is approaching a plateau.

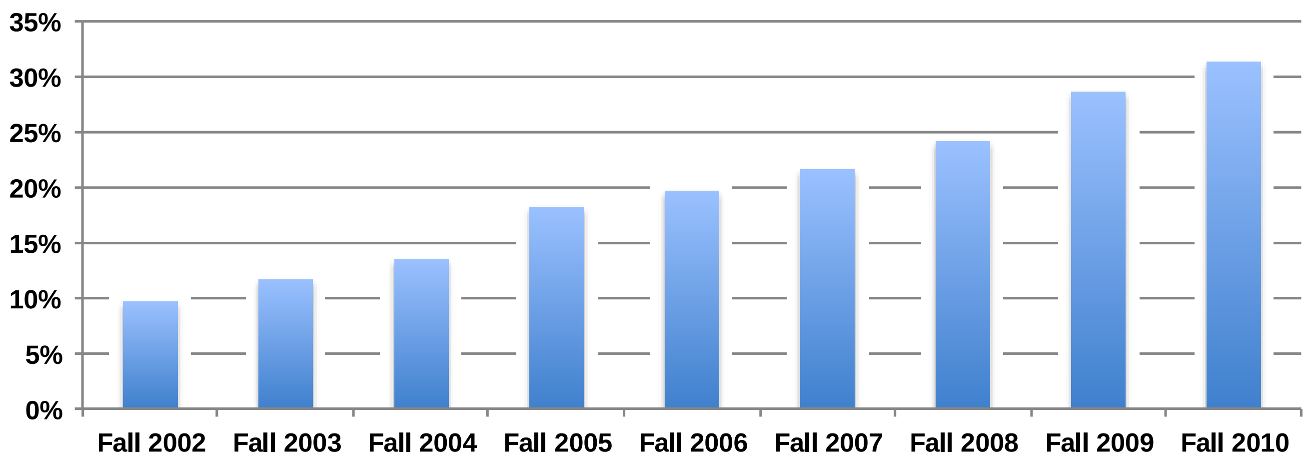
[3] Projections of Education Statistics to 2019, National Center for Education Statistics

**Total and Online Enrollment in Degree-granting Postsecondary Institutions – Fall 2002 through Fall 2010**




The first year of this study (fall 2003) found slightly less than ten percent of all higher education students were taking at least one online course. The proportion has continued its steady increase over this nine-year time span. That fraction now stands at 31 percent.

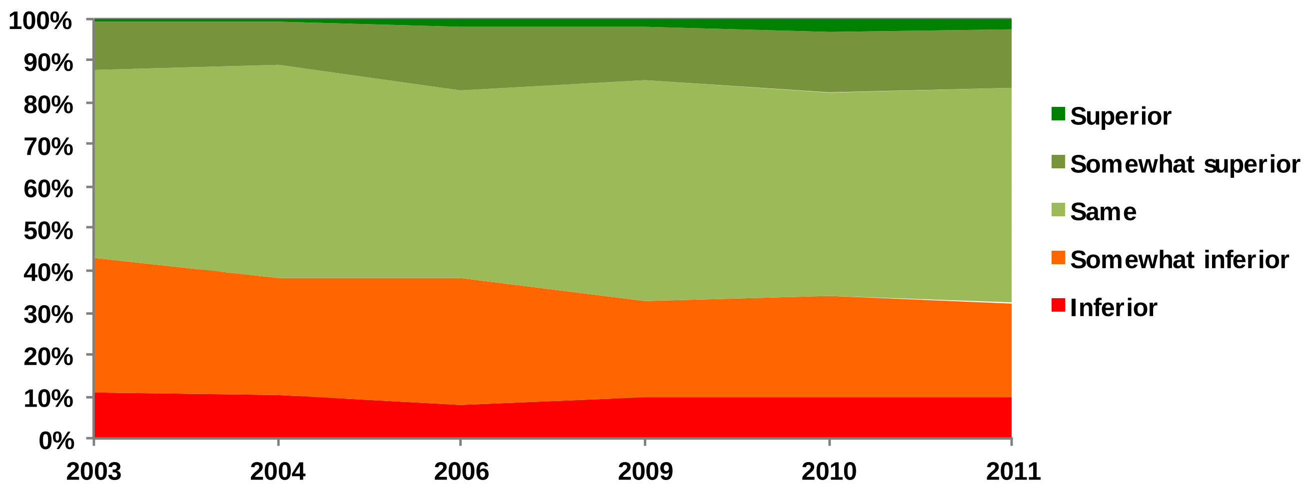
**Online Enrollment as a Percent of Total Enrollment - Fall 2002 through Fall 2010**



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

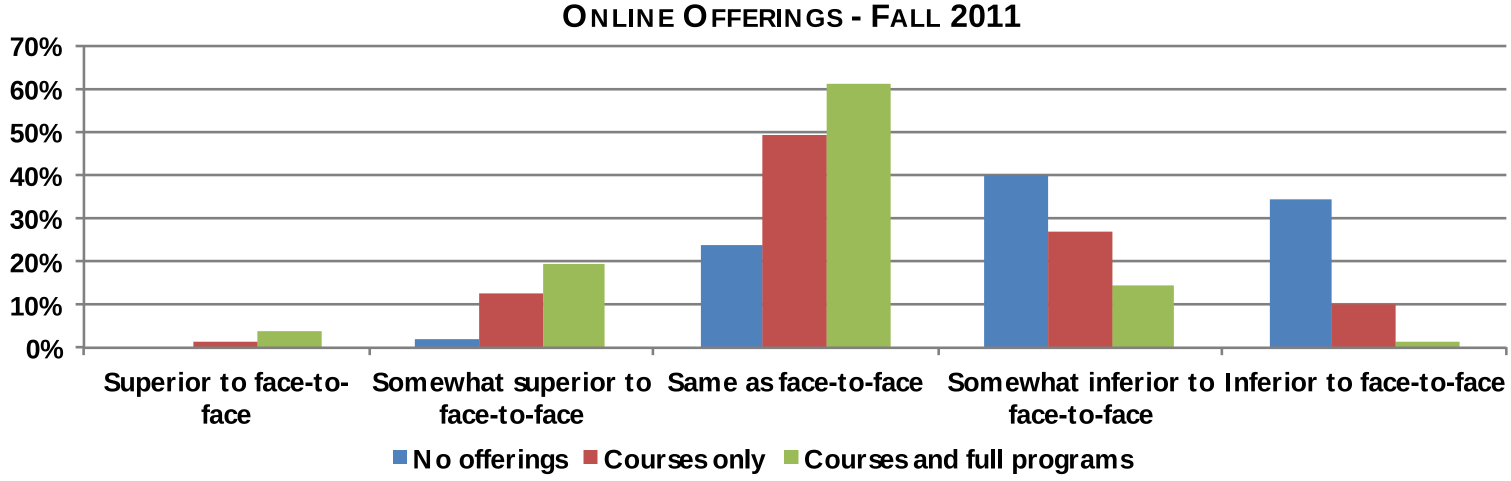
The view that online education is "just as good as" face-to-face instruction is by no means universally held. While there has been a slow increase in the proportion of academic leaders that have a positive view of the relative quality of the learning outcomes for online courses as compared to comparable face-to-face courses, there remains a consistent and sizable minority that see online as inferior. The results for 2011 show a small increase among those who say online is "at least as good" – those who rate online as either the same or superior to face-to-face. This proportion now represents just over two-thirds of all respondents, up from fifty-seven percent in the first year of the study (2003).

**LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE: 2003 - 2011**




While over two-thirds of academic leaders believe that online is "just as good as" or better, this means that one-third of all academic leaders polled continue to believe that the learning outcomes for online courses are inferior to those for face-to-face instruction. While there has been downward trending of this proportion over the nine years that these reports have been tracking this dimension, there has not been any substantial change.

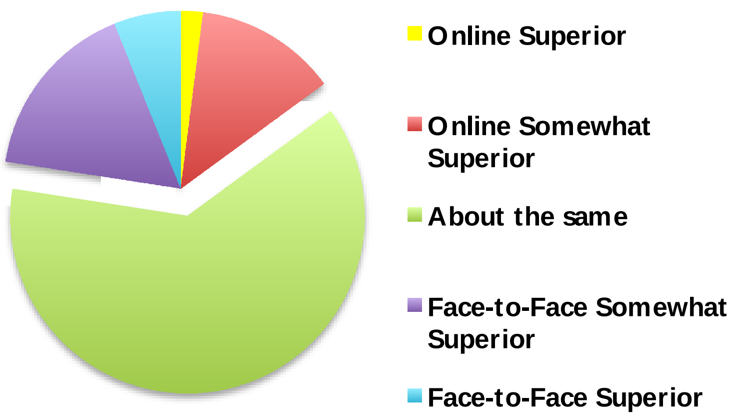
**LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE BY ONLINE OFFERINGS - FALL 2011**



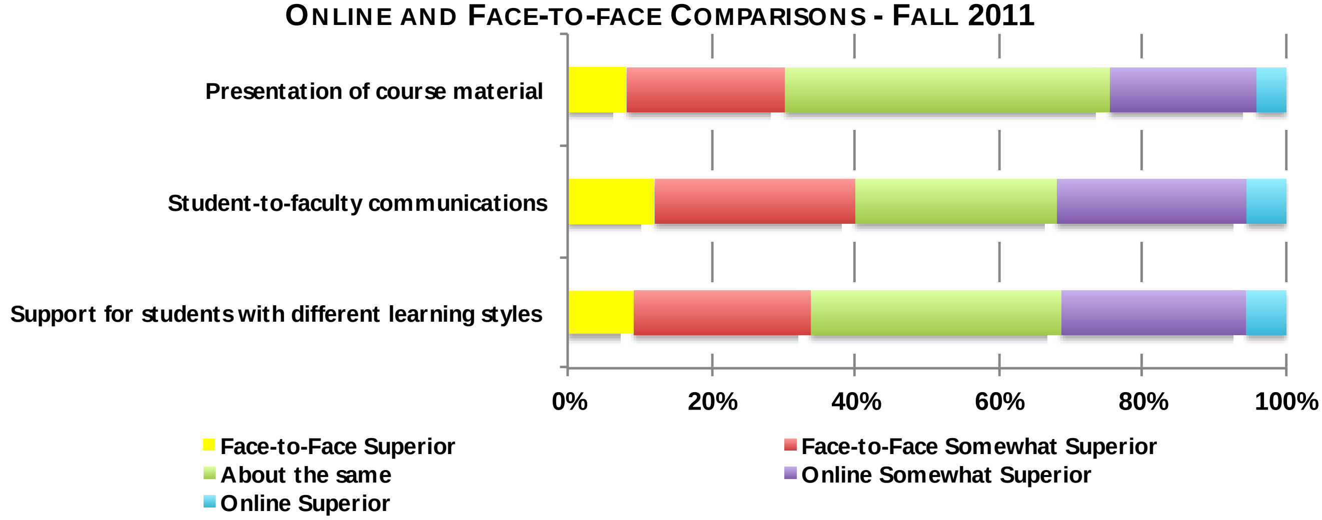
A consistent finding over the years is the strong positive relationship of academic leaders at institutions with online offerings also holding a more favorable opinion of the learning outcomes for online education. The more extensive the online offerings at an institution, the more positive they rate the relative quality of online learning outcomes. It is unclear, however, which came first – is it that those institutions with a positive opinion towards online are more likely to implement and grow online courses and programs, or is it that institutions with experience with online develop a more positive attitude as their online offerings grow?

Why do academic leaders rate the relative quality the way that they do? What dimensions of an online course or of a face-to-face course contribute to their view of the relative learning outcomes? While clearly not a measure of quality, there is one dimension that academic leaders believe is equivalent for the both types of courses – the level of student satisfaction. These reports first examined this aspect in 2004, and found respondents believed that students were at least as satisfied with online courses as they were with face-to-face instruction. The most recent results confirm this, with nearly two-thirds of all academic leaders surveyed report that they believe that the level of student satisfaction is "about the same" for both online and face-to-face courses. A small number believes that satisfaction is higher with online courses, while a slightly larger number say it is higher for face-to-face courses.

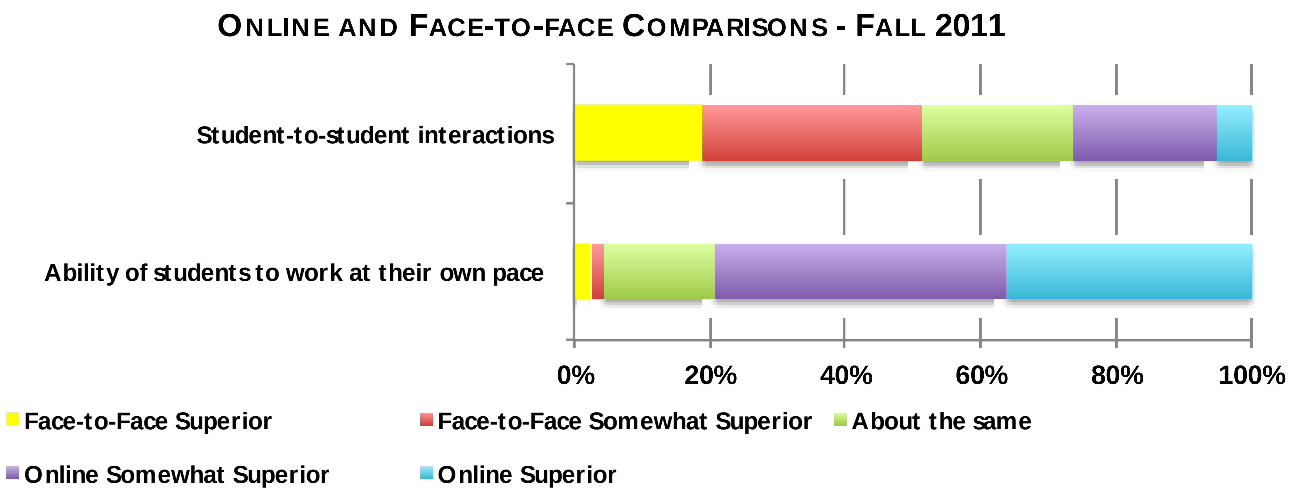
**Perceived Student Satisfaction in Online and Face-to-face Courses - Fall 2011**




**Online and Face-to-face Comparisons - Fall 2011**

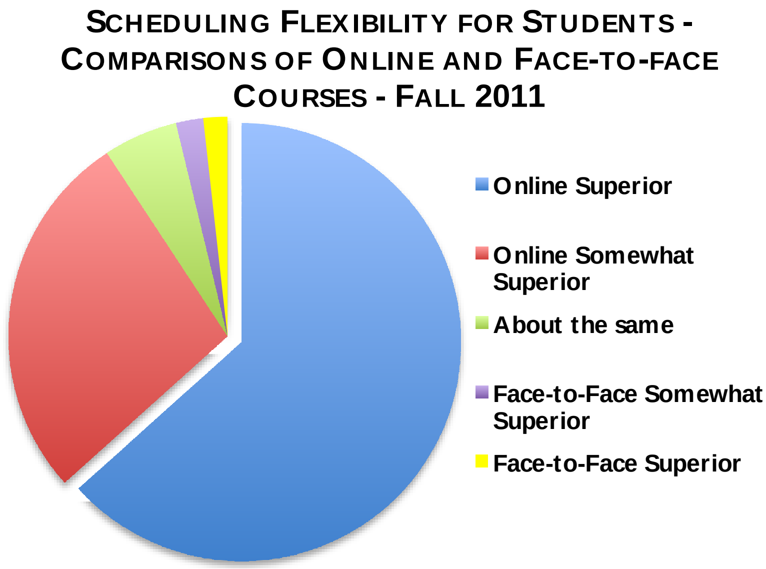


When probed about other dimensions of possible difference between the two types of learning modalities, academic leaders also rated several other aspects as very similar between online and face-to-face instruction. Their opinion of the relative advantage of one type of delivery over the other in the presentation of course material, student to faculty communications, and support for students with different learning styles showed roughly equal numbers rating each type as superior. The area of student to faculty communication shows a slightly greater proportion reporting face-to-face as superior (40% as compared to 32% who rated online as superior for this dimension). The other results are very evenly divided between those who favor online and those who favor face-to-face.




There are other dimensions of a course for which academic leaders believe that one or the other delivery methods is clearly the superior option. Face-to-face instruction is viewed as far superior for student-to-student communications. Over one-half of all academic leaders report that they believe that face-to-face instruction is “superior” or “somewhat superior” in supporting student-to-student interactions. Another one-quarter rates the two methods as about the same for this dimension. The results are reversed when academic leaders are asked about the ability to allow students to work at their own pace in each type of course. Here nearly 80 percent of the respondents believe that online instruction is superior. This compares to only four percent who say face-to-face instruction is superior for this dimension.

When asked why their institutions have implemented online courses and programs, academic leaders have consistently told us that online education provides greater flexibility – sometimes for the institution or the faculty member, but primarily for the student. Not surprisingly, online instruction is seen as having much better scheduling flexibility for students. Over 90 percent of all academic leaders rate the scheduling flexibility of online as “superior” or “somewhat superior” to that for face-to-face instruction.




In summary, the only dimension among those examined where online was seen as inferior to face-to-face instruction was in the area of student-to-student interactions. For most aspects, the two were rated fairly equally. The advantage of online in terms of flexibility for the student, both to potentially work as his or her own pace as well as for scheduling, are the only areas where this type of delivery is seen as clearly superior.

While most academic leaders believe that online learning is "as good as" face-to-face instruction, there remains a consistent minority that disagrees. Examination of several specific aspects of instruction quality does not provide a clear determination of why academic leaders hold this view. They rate online and face-to-face as equivalent along most dimensions, with a clear preference for face-to-face for only the single aspect of student-to-student communications. They consider the flexibility of online to be superior to that of face-to-face, but that does not seem to provide sufficient reason for them to favor online in general.

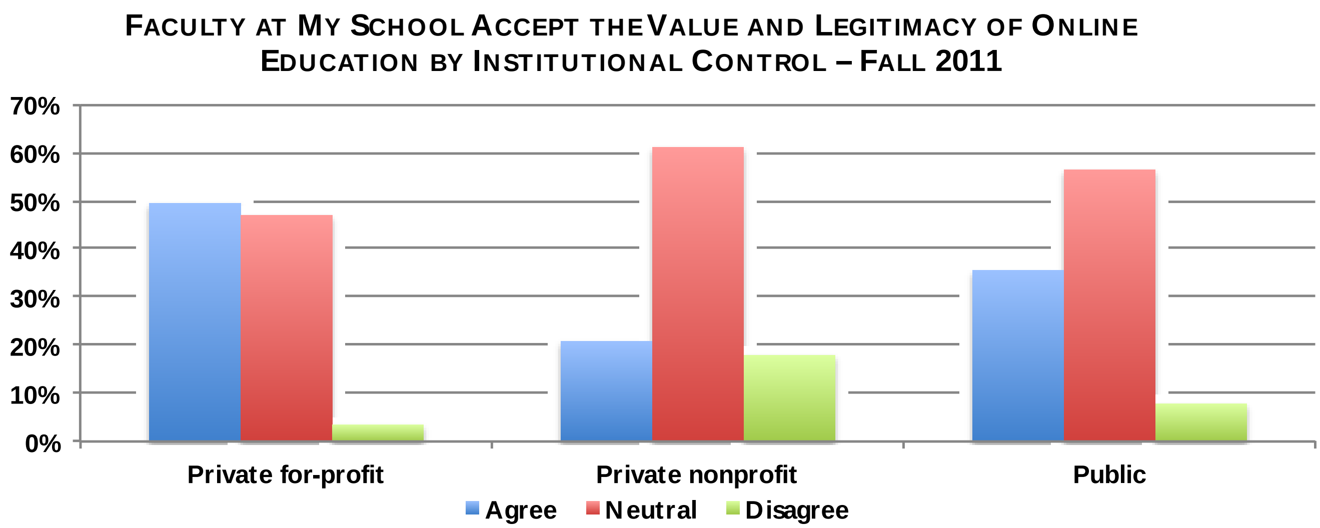
## Has Faculty Acceptance of Online Increased?

Even institutions that have the most positive attitudes towards online learning, and have implemented the most comprehensive online programs, often report that not all their faculty fully accepts online instruction. Chief academic officers report a slight increase in the faculty acceptance of online instruction over the results last reported for 2009. Between 2002, when this question was first asked, and 2007 the proportion of institutions reporting that their faculty accept the value and legitimacy of online education increased barely six percentage points. This was followed by a small drop in 2009. The most recent increase brings the number close to the figure seen in 2006 and 2007.

**Faculty at My School Accept the Value and Legitimacy of Online Education – Fall 2002 to Fall 2011**

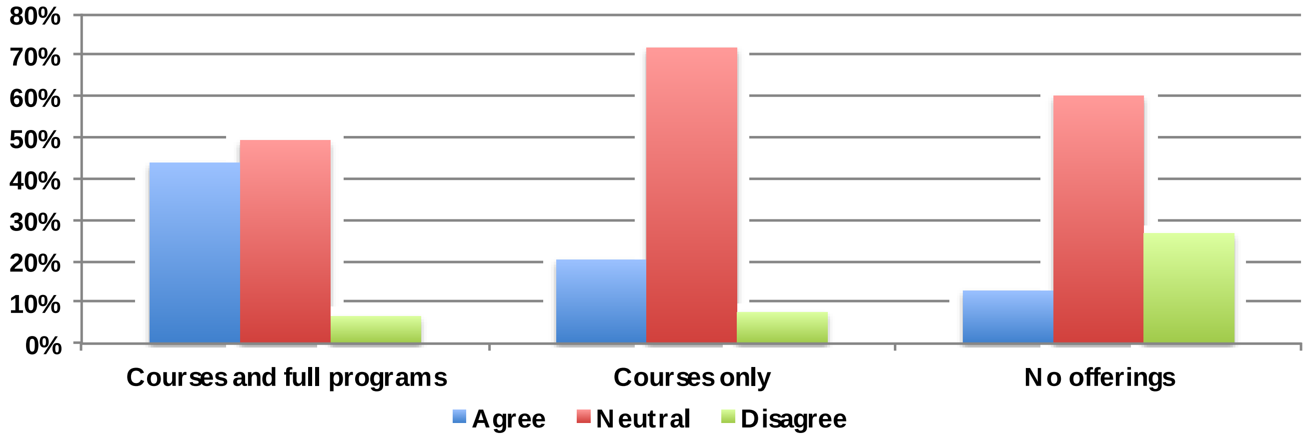
| | Fall 2002 | Fall 2004 | Fall 2005 | Fall 2006 | Fall 2007 | Fall 2009 | Fall 2011 |
|---|---|---|---|---|---|---|---|
| Agree | 27.6% | 30.4% | 27.6% | 32.9% | 33.5% | 30.9% | 32.0% |
| Neutral | 65.1% | 59.3% | 57.8% | 56.1% | 51.9% | 51.8% | 56.5% |
| Disagree | 27.6% | 10.3% | 14.7% | 11.0% | 14.6% | 17.3% | 11.4% |

Academic leaders at the private for-profit institutions have the most favorable perception of their faculty's acceptance, while those at the private nonprofits have the lowest rate. Less than four percent of the leaders at private for-profit institutions report that their faculty do not accept the value and legitimacy of online education, a rate that compares to 18 percent for the leaders at private nonprofit institutions.




The perceived acceptance rate by faculty varies widely between colleges and universities with online offerings and those without such offerings. Over one-quarter of chief academic officers at institutions with no online offerings report that their faculty do not accept its value; which is, perhaps, a self-fulfilling prophecy. Institutions that offer only online courses and those that offer both online course and full online programs report that only seven percent of their faculty do not fully accept online education. Conversely, the proportion of leaders at institutions with online programs that say that their faculty accept online is highest at 44 percent (compared to 21% for those with only online courses and only 13 percent for those with no online). While the acceptance at institutions that are more engaged in online is greater than at other institutions, there remains a level of concern among all academic leaders about the full acceptance of online instruction by their faculty. Part of this observed pattern may be the result of hiring practices – institutions with extensive online offerings may be hiring teachers specifically for online instruction.

**Faculty at My School Accept the Value and Legitimacy of Online Education by Online Offerings – Fall 2011**

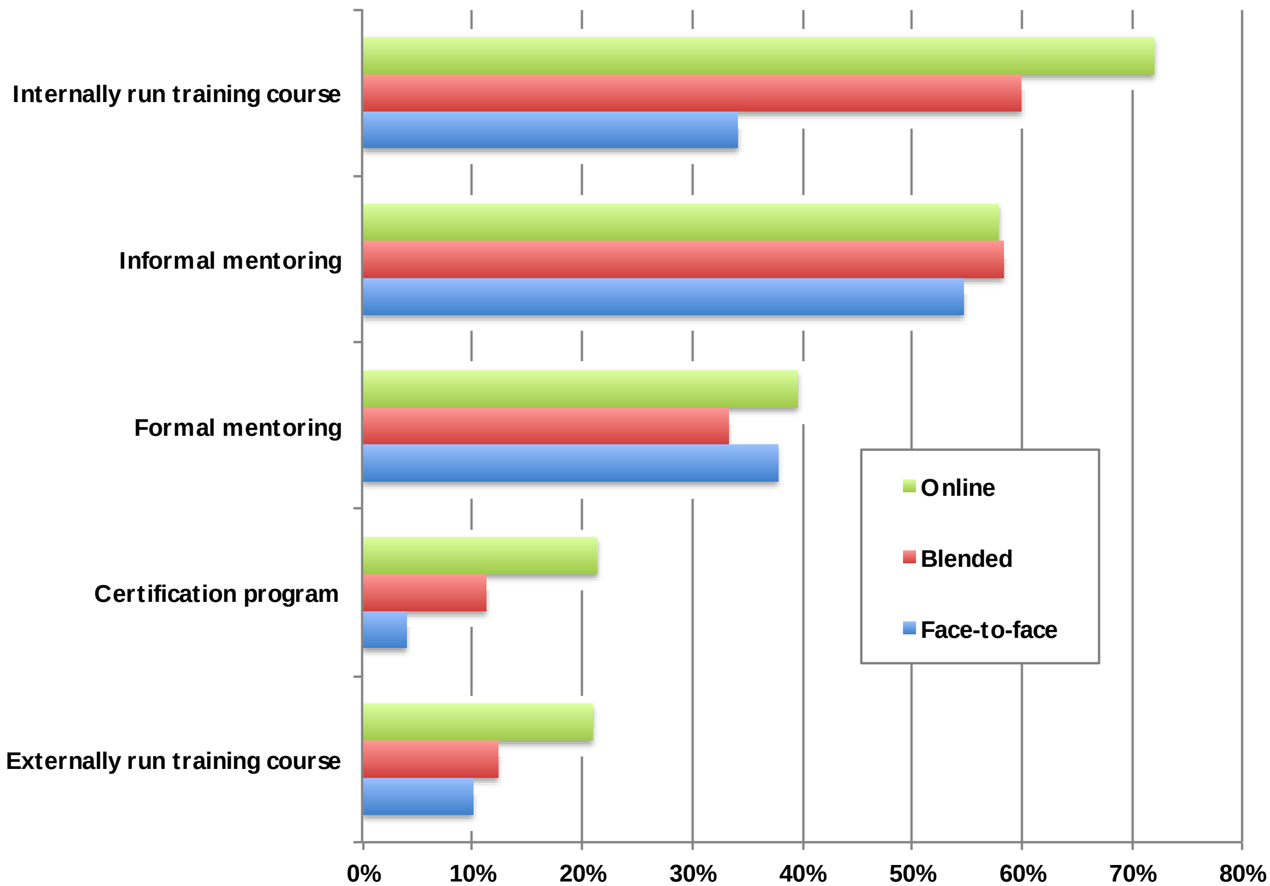


## What Training Do Faculty Receive for Teaching Online?

In 2009 this survey first asked chief academic officers about the training provided to faculty who are teaching online. Nearly one-fifth (19 percent) of all institutions reported that they do not provide any training (even informal mentoring) for their faculty teaching online courses. In this year's survey we have expanded the scope of investigation to examine training for faculty developing or teaching online, blended, and face-to-face courses.

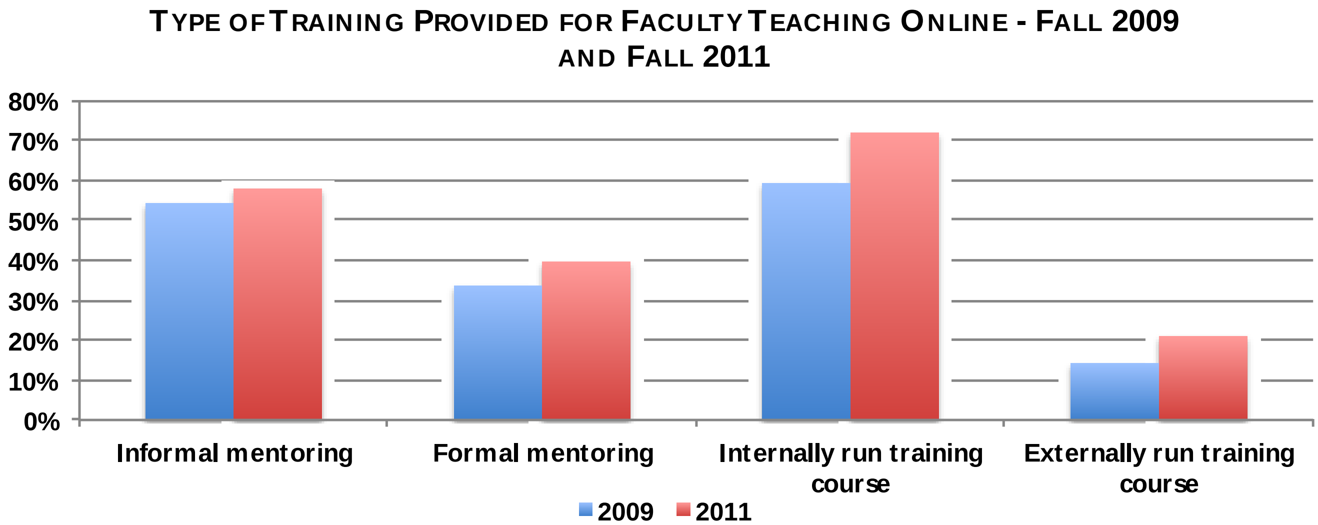
There has been a substantial decrease in the proportion of institutions that report that they do not provide any training for their faculty who teach online -- it is now only six percent of academic leaders who report this. The pattern of types of training provided is otherwise very similar in 2011 as it was in 2009; internally run training courses are the most common approach, followed by informal mentoring and then by a formal mentoring program.

**TYPE OF FACULTY TRAINING PROVIDED BY TYPE OF COURSE - FALL 2011**

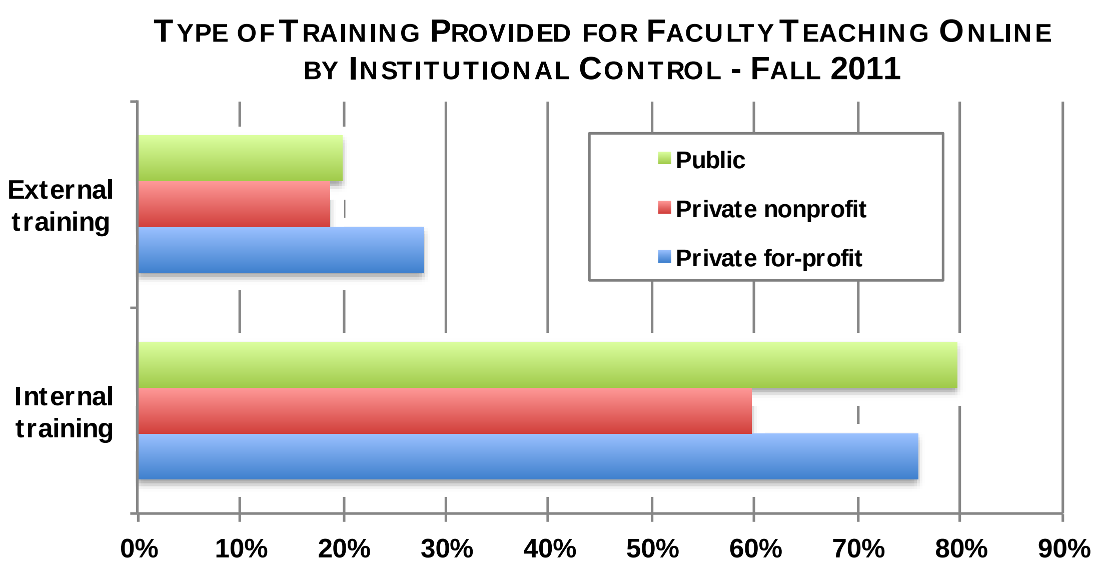



There is an increase in the proportion of institutions reporting that they provide each of the various types of training for online teaching faculty over the two-year period from 2009 to 2011. Informal mentoring grew by four percent, formal mentoring by six percent, and externally run courses by seven percent. The greatest growth was for internally run training courses, with 72 percent of all institutions with online offerings now reporting that they offer this type of training for their faculty, up from 59 percent two years ago.

In comparing the training offerings for faculty teaching other types of courses (blended and face-to-face) with that provided for faculty teaching online, the patterns of offerings diverge. Internally run training courses are provided at twice the rate for those teaching online as for those who are teaching face-to-face (72% for online compared to 34% for face-to-face). Likewise, certification programs are rare for face-to-face training programs. Mentoring programs, both formal and informal, are used equally for all three types of training programs.

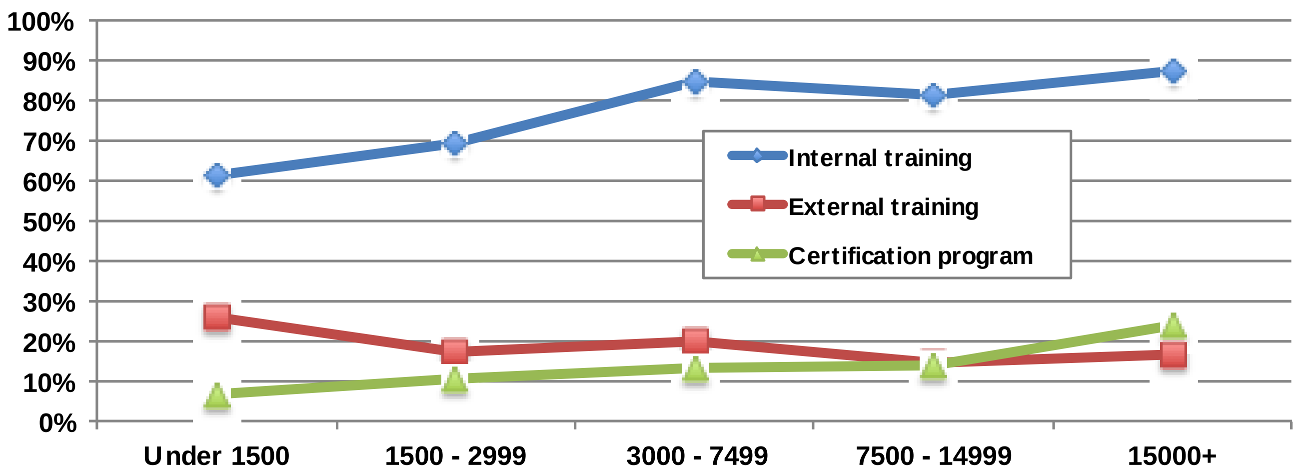



Institutional control does not have a large impact of the provision of internal or external training courses. Public, private nonprofit, and private for-profit institutions are all far more likely to include internally run training courses are part of their training for faculty teaching online than to use externally run courses.



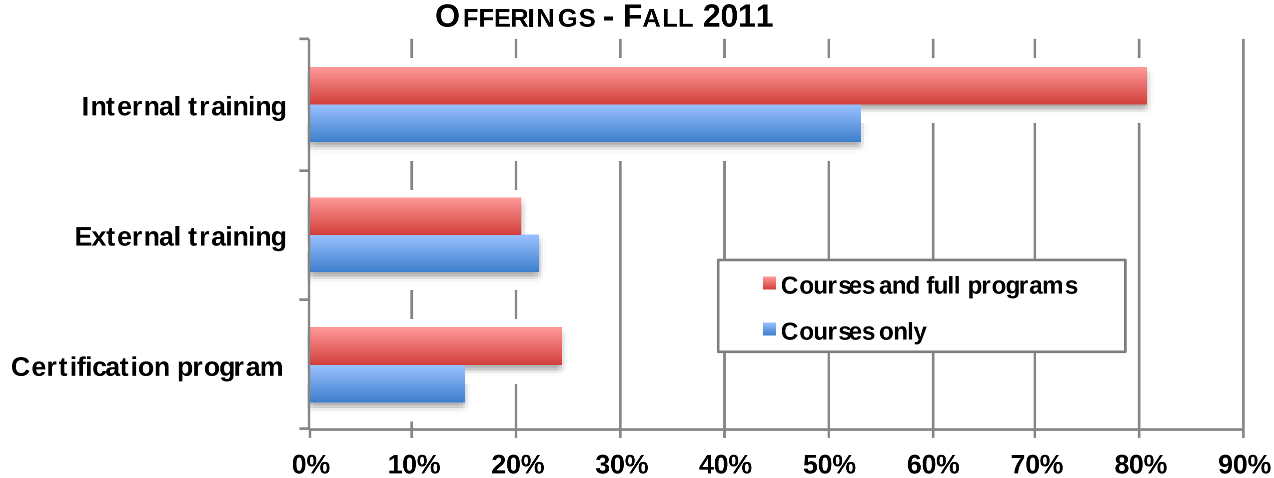
There does appear to be a size effect in determining what types of training is provided for faculty teaching online. The very smallest institutions are the least likely to provide internally run training courses - possibly because their small size reflects a shortage of the specific resources needed to support these training programs. The largest institutions (over 15,000 total enrollments) can be expected to have the richest array of resources, and therefore be the most likely to run internal training programs. These largest institutions are also the least likely (7 percent) to employ externally run training programs for their online teaching faculty.

**Type of Training for Faculty Teaching Online by Overall Enrollment - Fall 2011**




Does the level of online involvement for an institution translate into increased training opportunities for faculty teaching online? There is a difference observed between the training offerings for faculty teaching online at institutions with online courses and full online programs and those teaching at institutions with only online course offerings. Those at institutions with online program offerings are more likely (80 percent compared to 53 percent) to have an internally run training course in place.

**Type of Training for Faculty Teaching Online by Online Offerings - Fall 2011**

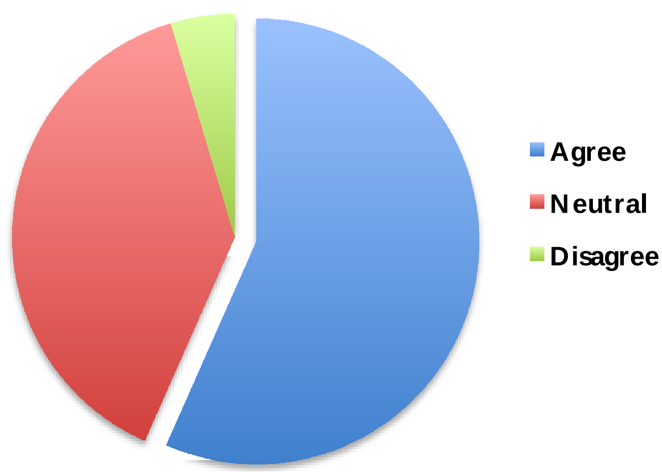


## What is the Role of Open Education Resources?

Online education is possible only because of the technology changes that have impacted all areas of contemporary life. High-speed networks, nearly ubiquitous computing availability, and software to support teaching and learning have combined to provide the foundation on which online learning has grown. This changing landscape also has opened to door for other changes in higher education. One such change element is the use of Open Education Resources (OER).

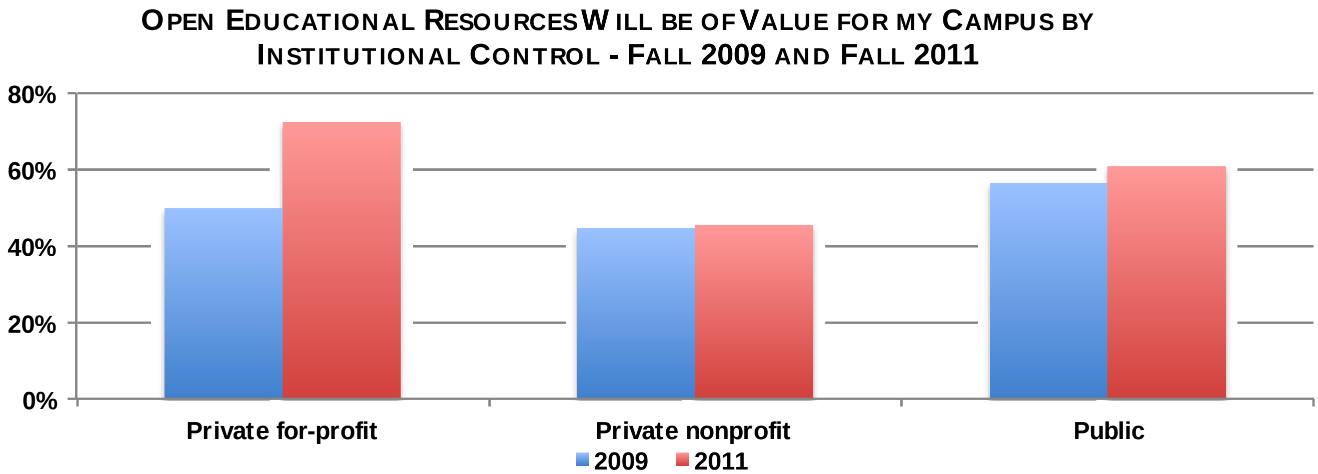
Working with The William and Flora Hewlett Foundation, the Babson Survey Research Group added OER as an important area of research for this year's survey. The dimensions examined include the level of awareness that academic leaders have of OER, if they perceive that OER will have value for their campus, their current pattern of use of OER materials, and the opinions of these academic leaders on specific aspects of the appropriateness of OER for their own institution.

OPEN EDUCATIONAL RESOURCES WILL BE OF VALUE FOR MY CAMPUS - FALL 2011

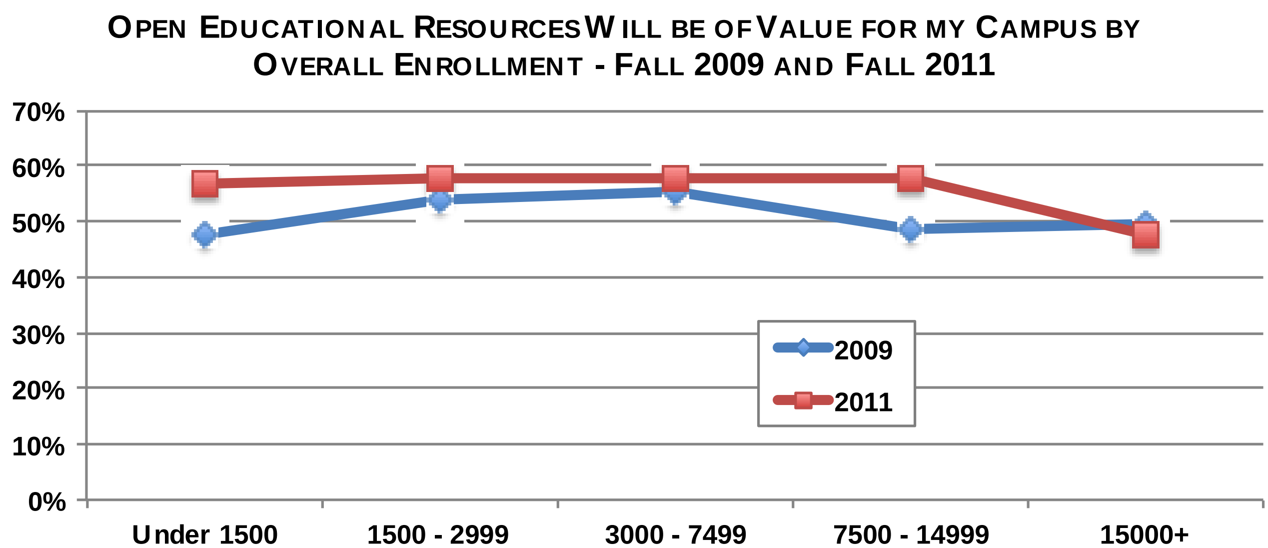



Most surveyed academic leaders believe that Open Education Resources will have value for their campus; 57 percent agree that they have value and less than five percent disagree. These results are similar to those for the same question when asked two years ago, with one notable difference. The proportion of for-profit institutions agreeing with this statement has shown a large increase over the two-year period (moving from 49.8% in 2009 to 72.4% in 2011). Both private nonprofit institutions and public institutions display smaller increases over this time period.

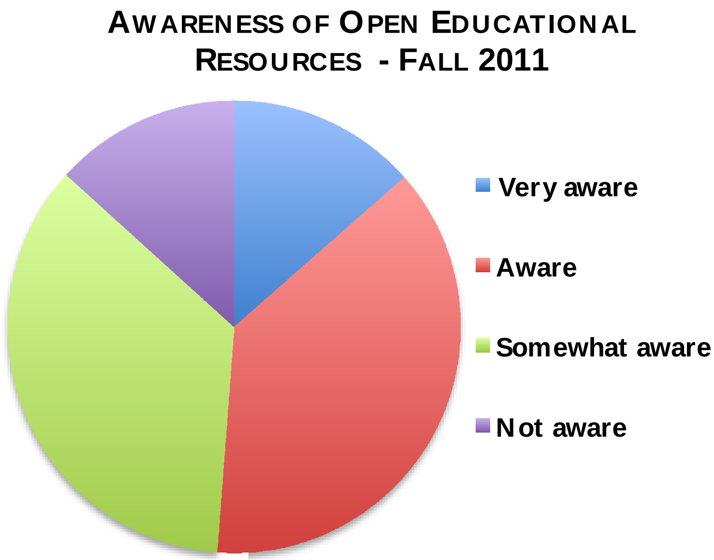
Unlike the difference seen by type of institution, there are only small differences in opinion among academic leaders at different sized institutions. Comparing the 2009 results to those for 2011 by the size of the institution shows small increases in the proportion agreeing for all but the very largest institutions. The 2011 results are now virtually the same for all sized institutions, with 57 or 58 percent of all but the very largest institutions agreeing (the largest institutions have an agreement level ten points lower at 48 percent).



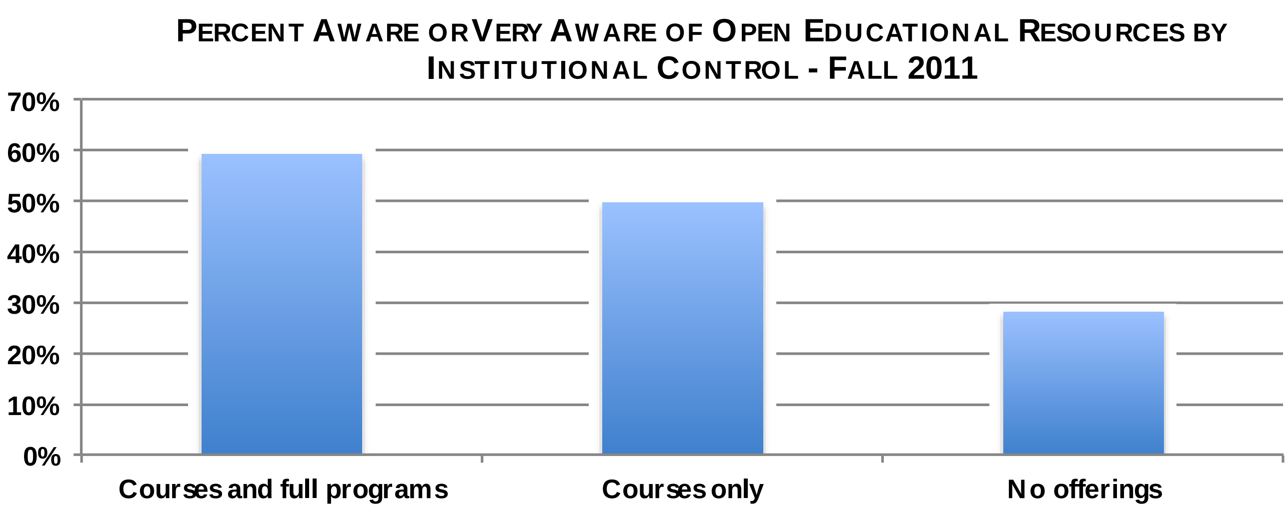

The first survey in this series in 2003 found a mixed level of awareness of online learning among higher education leaders. Over time this has changed and we may be seeing the same awareness gap in OER. What is the current level of awareness of Open Education Resources among these same leaders? A small fraction (13.5%) reports that they are "very aware", while over a third (37.7%) classify themselves as "aware" of OER. Another third is "somewhat aware" – leaving a small group (13.3%) who say that they are not aware of OER at all.



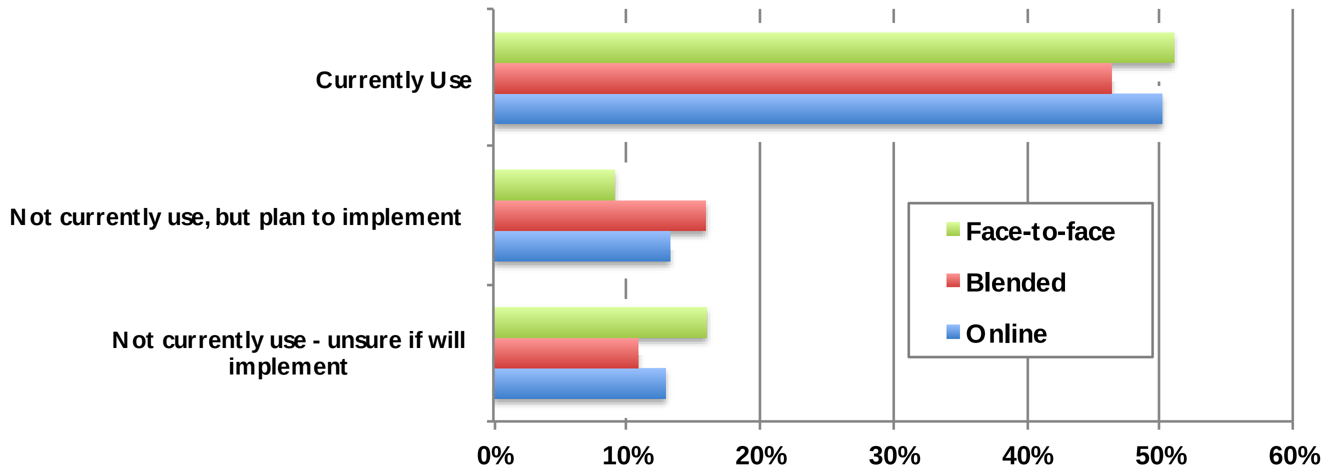

One hypothesis is that those most engaged in online learning may have a higher level of awareness of OER. The logic for this presumes that online courses at an institution have often been developed much more recently than the corresponding face-to-face courses, reflecting the recent and rapid growth in this sector of higher education. This, coupled with a presumed greater awareness of technology options in general, may provide academic leaders that are heavily engaged in online learning with an opportunity to have greater exposure to OER and other newer course creation options. The results do seem to confirm the hypothesis, academic leaders at institutions with fully online offerings (both individual courses and fully online programs) are twice as likely to classify themselves as "aware" or "very aware" of Open Education Resources.




While the pattern of awareness of Open Education Resources varies with the intensity of online offerings, the pattern of use does not. When asked if they currently use OER for their online, blended, and face-to-face courses, academic leaders report equal levels of use for courses of all three types of delivery methods. About one-half of institutions report that they currently use OER with each type of course. The proportion that plans to implement or might implement is also very similar across all three course types.

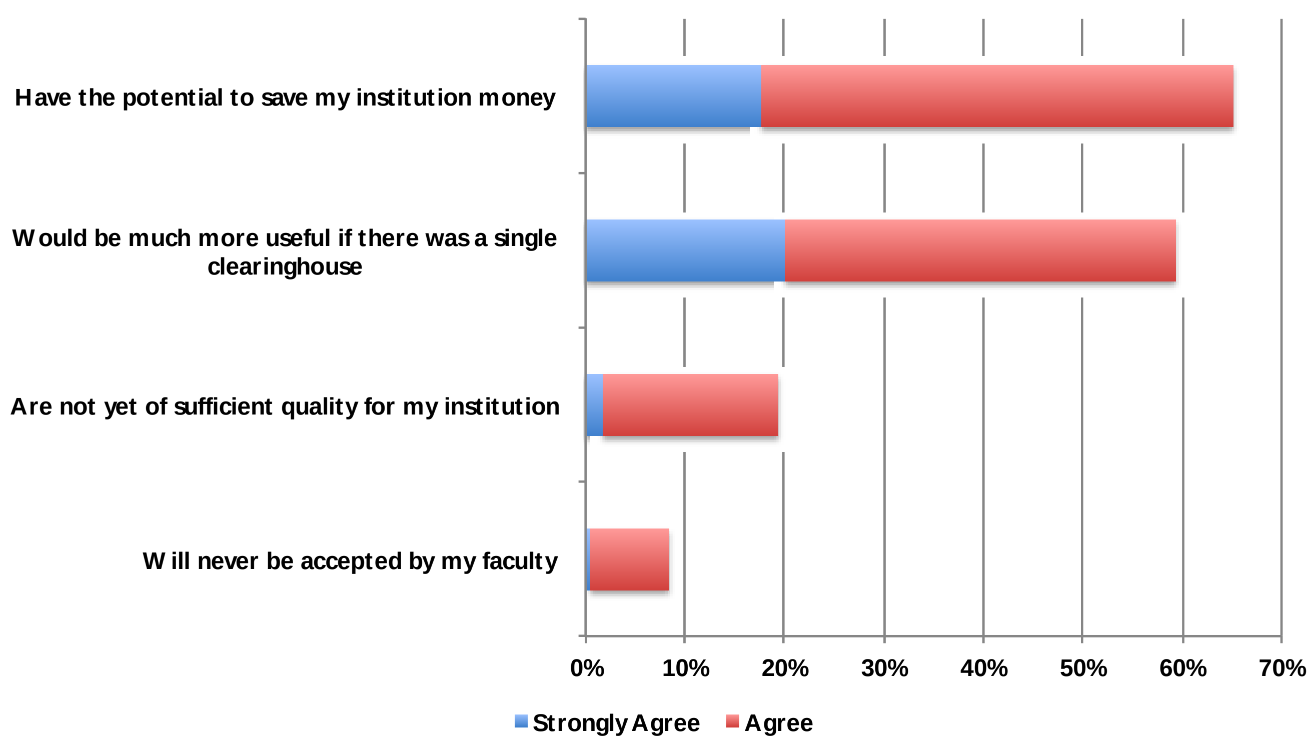


## USE OF OPEN EDUCATIONAL RESOURCES BY TYPE OF COURSE - FALL 2011




Open Education resources are seen as having the potential to reduce costs – nearly two-thirds of all surveyed chief academic officers agree with this statement. Concerns about acceptance and quality are low, less than one in ten think that their faculty will not accept OER and only one-fifth believe OER resources "are not yet of sufficient quality for my institution." That does not mean, however, that finding, selecting, and incorporating OER into courses is easy. Nearly 60 percent agree that it "would be more useful if there was a single clearinghouse" for OER materials.

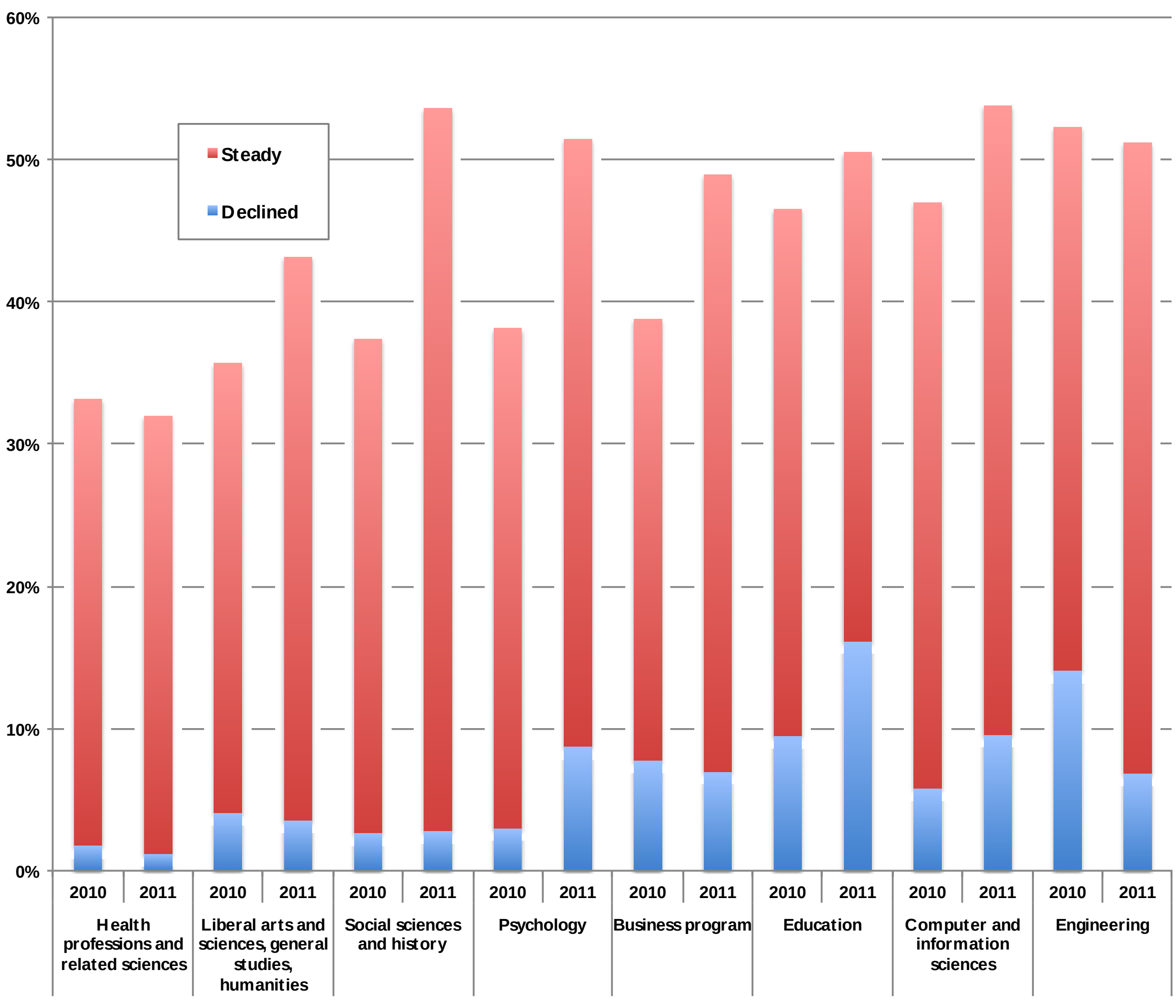
## OPINIONS ABOUT OPEN EDUCATIONAL RESOURCES - FALL 2011



## What is the Future for Online Enrollment Growth?

The smooth line displaying continued growth in the number of students learning online over the past nine years masks considerable variability below the surface. While the overall number of students taking at least one online course has gone up every year, individual institutions and specific programs within these institutions may not always experience the same level of growth. The normal ebb and flow of year-to-year enrollment changes in a single course can have a real impact on the total enrollments for those institutions with only a few online courses. At the larger institutions a decrease in the enrollment of one program may be offset by increases in other areas, still yielding overall growth in the number of online learners. In some rare cases, entire institutions can see enrollments decline, but these decreases have been more than made up by growth from other institutions.

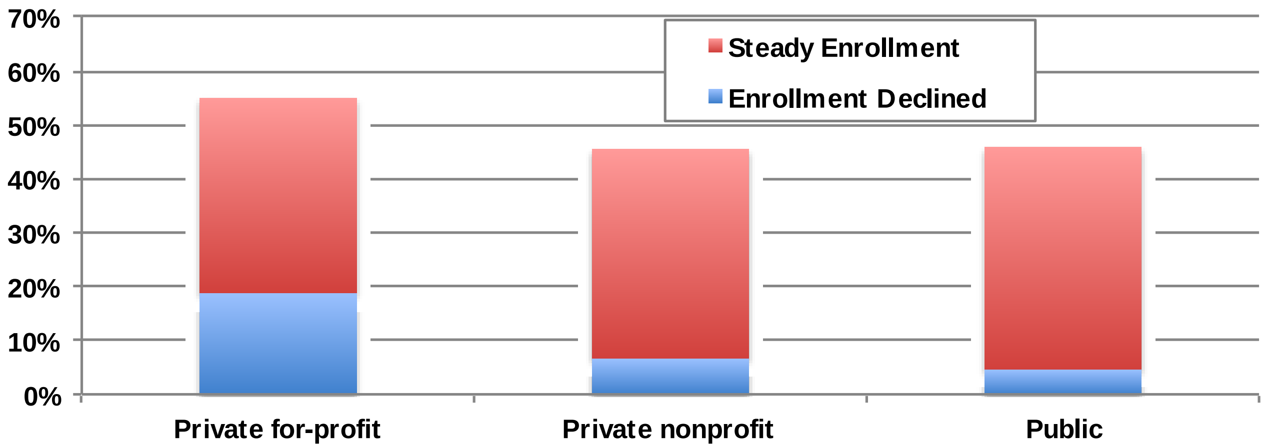
ENROLLMENT CHANGE FOR ONLINE PROGRAMS BY DISCIPLINE - FALL 2010 AND FALL 2011




The 2010 report in this series began an examination of the changes occurring within different areas of the overall institution by charting the relative year-to-year changes in enrollments by program discipline areas. By examining the change in enrollments for online programs by discipline, we can begin to get a clearer picture about where growth is concentrated, and where it may be lagging. The results last year showed that between one-third and one-half of all fully online programs did not grow, but instead had a steady or even declining enrollments. Declines are still rare (ranging from between one and nine percent of the programs in any particular discipline area), but steady enrollments were observed in around one-third of programs of in all areas.

Examining these same areas for 2011 shows a few notable changes. Two program areas, Psychology and Education, had a larger proportion of programs with an enrollment decline over the 2010 to 2011 period than were reported last year. Conversely, the area with the highest proportion of programs with declining enrollments in 2010 (Engineering) had a bit of a comeback this year, and it no longer leads in this dimension. Increasing numbers of programs in Social Sciences, Psychology, and Business are no longer reporting enrollment growth, but rather steady enrollments. Programs in Computer and Information Sciences and Liberal Arts also show an increased proportion with steady enrollments, but the changes here are not as dramatic as for the previously mentioned disciplines. The Health professions discipline stands alone, as it appears to be the fastest growing. It is the only program area showing a greater proportion of programs with enrollment growth, with a decrease in both the proportion with an enrollment decline and a decrease in the proportion with steady year-to-year enrollment.

**PROPORTION OF ONLINE PROGRAMS WITH STEADY OR DECLINING ENROLLMENTS BY INSTITUTIONAL CONTROL - FALL 2011**




Is the pattern we observe due to reduced demand for specific program areas, or because of a larger issue impacting all online education or all higher education? For example, the increasing attention and regulatory focus on the for-profit sector could have an impact here. One possible indicator is to examine the pattern by the control of the institution to see if the impact is greater among the for-profit institutions. The results show that over one-half of all programs (55%) at for-profit institutions did not grow, but instead had steady or declining enrollments, compared to only 46 percent of programs at public or private nonprofit institutions. More tellingly, the percentage of for-profit programs that reported enrollment declines is more than double that of the other types of institutions (19% versus 7% for private nonprofits and 5% for public institutions). This trend is worth watching in future years. In particular, it would be useful to track these same program-level enrollment changes for face-to-face programs in addition to online programs, to determine if changes span all higher education or are just limited to the online portion.

# SURVEY METHODOLOGY

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

The data for this report is collected by both the Babson Survey Research Group and by the College Board[4]. 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 that they would be notified when the report was released and would receive a free copy.

The sample universe contains 4,523 institutions; a total of 2,512 responses were included in the analysis, representing 55.5 percent of the sample universe. Because non-responding institutions are predominately those with the smallest enrollments, the institutions included in the analysis represents 80.0 percent of higher education enrollments. The 2011 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, and 2,583 in 2010) 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. After the data were 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 2005 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.

The 2009 report marked a change in the timing of the annual data collection cycle. In an effort to present more timely results, data collection for the opinion portion of the survey has been delayed from the spring (asking about the previous fall term), until the fall (with the questions now referring to the current fall term). Because of the need for institutions to have complete records of their data, results for enrollment and program offerings continue to refer to the previous fall term.

[4] 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 © 2010-2011 The College Board.

# Additional Tables

## Is Online Learning Strategic?

### Online Education is Critical to the Long-term Strategy of my Institution – Fall 2002 to Fall 2011

| | Fall 2002 | Fall 2003 | Fall 2004 | Fall 2005 | Fall 2006 | Fall 2007 | Fall 2009 | Fall 2010 | Fall 2011 |
|---|---|---|---|---|---|---|---|---|---|
| **Agree** | 48.8% | 53.5% | 56.0% | 58.4% | 59.1% | 58.0% | 59.2% | 63.1% | 65.5% |
| **Neutral** | 38.1% | 33.7% | 30.9% | 27.4% | 27.4% | 27.0% | 25.9% | 24.6% | 21.0% |
| **Disagree** | 13.1% | 12.9% | 13.1% | 14.2% | 13.5% | 15.0% | 14.9% | 12.3% | 13.5% |

### Online Education is Critical to the Long-term Strategy of my Institution, Percent Agreeing by Institutional Control – Fall 2009 to Fall 2011

| | Public | Private nonprofit | Private for-profit |
|---|---|---|---|
| **Fall 2009** | 73.6% | 49.5% | 50.7% |
| **Fall 2010** | 74.9% | 52.3% | 60.5% |
| **Fall 2011** | 77.0% | 54.2% | 69.1% |

### Online Education is Critical to the Long-term Strategy of Institution by Institutional Control and Plan Status – Fall 2010 and Fall 2011

| | Public | | Private nonprofit | | Private for-profit | |
|---|---|---|---|---|---|---|
| | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 |
| **In plan** | 48.1% | 48% | 32.5% | 35% | 57.8% | 59.8% |
| **Not in plan** | 26.9% | 29% | 19.8% | 19% | 2.7% | 9.3% |

### Online Education is Critical to the Long-term Strategy of my Institution by Institutional Control – Fall 2006 to Fall 2011

| | Fall 2006 | Fall 2007 | Fall 2009 | Fall 2010 | Fall 2011 |
|---|---|---|---|---|---|
| **Public** | 74.1% | 70.7% | 73.6% | 74.9% | 77.0% |
| **Private, nonprofit** | 48.6% | 47.1% | 49.5% | 52.3% | 54.2% |
| **Private, for-profit** | 49.5% | 53.2% | 50.7% | 60.5% | 69.1% |

## How Many Students are Learning Online?

**TOTAL AND ONLINE ENROLLMENT IN DEGREE-GRANTING POSTSECONDARY INSTITUTIONS – FALL 2002 THROUGH FALL 2010**

| | Total Enrollment | Annual Growth Rate Total Enrollment | Students Taking at Least One Online Course | Online Enrollment Increase over Previous Year | Annual Growth Rate Online Enrollment | Online Enrollment as a Percent of Total Enrollment |
|---|---|---|---|---|---|---|
| **Fall 2002** | 16,611,710 | NA | 1,602,970 | NA | NA | 9.6% |
| **Fall 2003** | 16,911,481 | 1.8% | 1,971,397 | 368,427 | 23.0% | 11.7% |
| **Fall 2004** | 17,272,043 | 2.1% | 2,329,783 | 358,386 | 18.2% | 13.5% |
| **Fall 2005** | 17,487,481 | 1.2% | 3,180,050 | 850,267 | 36.5% | 18.2% |
| **Fall 2006** | 17,758,872 | 1.6% | 3,488,381 | 308,331 | 9.7% | 19.6% |
| **Fall 2007** | 18,248,133 | 2.8% | 3,938,111 | 449,730 | 12.9% | 21.6% |
| **Fall 2008** | 19,102,811 | 4.7% | 4,606,353 | 668,242 | 16.9% | 24.1% |
| **Fall 2009** | 19,524,750 | 2.2% | 5,579,022 | 972,669 | 21.1% | 28.6% |
| **Fall 2010** | 19,641,140 | 0.6% | 6,142,280 | 563,258 | 10.1% | 31.3% |

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

### Learning Outcomes in Online Education Compared to Face-to-face: 2003 - 2011

| | 2003 | 2004 | 2006 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| **Inferior** | 10.7% | 10.1% | 7.8% | 9.5% | 9.8% | 9.7% |
| **Somewhat inferior** | 32.1% | 28.4% | 30.3% | 23.0% | 24.3% | 22.7% |
| **Same** | 44.9% | 50.6% | 45.0% | 53.0% | 48.4% | 51.1% |
| **Somewhat superior** | 11.7% | 10.0% | 15.1% | 12.4% | 14.2% | 13.8% |
| **Superior** | 0.6% | 1.0% | 1.8% | 2.1% | 3.4% | 2.7% |

### Learning Outcomes in Online Education Compared to Face-to-face by Online Offerings - Fall 2011

| | Online Learning Offerings | | |
|---|---|---|---|
| | No offerings | Courses only | Courses and full programs |
| **Superior to face-to-face** | .0% | 1.6% | 4.0% |
| **Somewhat superior to face-to-face** | 1.7% | 12.3% | 19.3% |
| **Same as face-to-face** | 23.9% | 49.4% | 61.3% |
| **Somewhat inferior to face-to-face** | 39.8% | 26.9% | 14.1% |
| **Inferior to face-to-face** | 34.5% | 9.8% | 1.3% |

### Perceived Student Satisfaction in Online and Face-to-face Courses - Fall 2011

| | |
|---|---|
| **Face-to-Face Superior** | 6.1% |
| **Face-to-Face Somewhat Superior** | 16.5% |
| **About the same** | 62.5% |
| **Online Somewhat Superior** | 12.9% |
| **Online Superior** | 2.0% |

### ONLINE AND FACE-TO-FACE COMPARISONS - FALL 2011

| | Support for students with different learning styles | Student-to-faculty communications | Presentation of course material |
|---|---|---|---|
| **Face-to-Face Superior** | 9.2% | 12.1% | 8.3% |
| **Face-to-Face Somewhat Superior** | 24.7% | 27.9% | 21.9% |
| **About the same** | 34.9% | 28.1% | 45.3% |
| **Online Somewhat Superior** | 25.7% | 26.4% | 20.4% |
| **Online Superior** | 5.6% | 5.5% | 4.1% |

### ONLINE AND FACE-TO-FACE COMPARISONS - FALL 2011

| | Ability of students to work at their own pace | Student-to-student interactions |
|---|---|---|
| **Face-to-Face Superior** | 2.6% | 19.0% |
| **Face-to-Face Somewhat Superior** | 1.7% | 32.4% |
| **About the same** | 16.5% | 22.3% |
| **Online Somewhat Superior** | 43.0% | 21.2% |
| **Online Superior** | 36.2% | 5.1% |

### SCHEDULING FLEXIBILITY FOR STUDENTS - COMPARISONS OF ONLINE AND FACE-TO-FACE COURSES - FALL 2011

| | |
|---|---|
| **Online Superior** | 63.3% |
| **Online Somewhat Superior** | 27.4% |
| **About the same** | 5.5% |
| **Face-to-Face Somewhat Superior** | 2.0% |
| **Face-to-Face Superior** | 1.8% |

## Has Faculty Acceptance of Online Increased?

**FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – FALL 2002 TO FALL 2011**

| | Fall 2002 | Fall 2004 | Fall 2005 | Fall 2006 | Fall 2007 | Fall 2009 | Fall 2011 |
|---|---|---|---|---|---|---|---|
| **Agree** | 27.6% | 30.4% | 27.6% | 32.9% | 33.5% | 30.9% | 32.0% |
| **Neutral** | 65.1% | 59.3% | 57.8% | 56.1% | 51.9% | 51.8% | 56.5% |
| **Disagree** | 27.6% | 10.3% | 14.7% | 11.0% | 14.6% | 17.3% | 11.4% |

**FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION BY INSTITUTIONAL CONTROL – FALL 2011**

| | Private for-profit | Private nonprofit | Public |
|---|---|---|---|
| **Agree** | 49.4% | 20.9% | 35.6% |
| **Neutral** | 47.0% | 61.1% | 56.5% |
| **Disagree** | 3.6% | 18.0% | 8.0% |

**FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION BY ONLINE OFFERINGS– FALL 2011**

| | Online Learning Offerings | | |
|---|---|---|---|
| | Courses and full programs | Courses only | No offerings |
| **Agree** | 43.9% | 20.4% | 13.0% |
| **Neutral** | 49.4% | 71.9% | 60.2% |
| **Disagree** | 6.7% | 7.7% | 26.8% |

## What Training Do Faculty Receive for Teaching Online?

**TYPE OF FACULTY TRAINING PROVIDED - FALL 2011**

| | Face-to-face | Blended | Online |
|---|---|---|---|
| **No specific training is provided** | 18.8% | 9.5% | 5.8% |
| **Other** | 8.0% | 8.6% | 7.8% |
| **Externally run training course** | 10.1% | 12.4% | 21.0% |
| **Certification program** | 4.0% | 11.3% | 21.4% |
| **Formal mentoring** | 37.8% | 33.3% | 39.6% |
| **Informal mentoring** | 54.7% | 58.3% | 57.9% |
| **Internally run training course** | 34.1% | 59.9% | 72.0% |

**TYPE OF TRAINING PROVIDED FOR FACULTY TEACHING ONLINE - FALL 2009 AND FALL 2011**

| | 2009 | 2011 |
|---|---|---|
| **Informal mentoring** | 54.3% | 57.9% |
| **Formal mentoring** | 33.6% | 39.6% |
| **Internally run training course** | 59.3% | 72.0% |
| **Externally run training course** | 14.2% | 21.0% |

**TYPE OF TRAINING PROVIDED FOR FACULTY TEACHING ONLINE BY INSTITUTIONAL CONTROL - FALL 2011**

| | Private for-profit | Private nonprofit | Public |
|---|---|---|---|
| **Internal training** | 75.9% | 59.7% | 79.7% |
| **External training** | 27.8% | 18.7% | 19.9% |

### Type of Training for Faculty Teaching Online by Online Offerings - Fall 2011

| | Courses only | Courses and full programs |
|---|---|---|
| **Certification program** | 15.0% | 24.3% |
| **External training** | 22.1% | 20.4% |
| **Internal training** | 53.2% | 80.7% |

### Type of Training Provided for Faculty Teaching Online - Fall 2011

| | Overall Enrollment | | | | |
|---|---|---|---|---|---|
| | Under 1500 | 1500 - 2999 | 3000 - 7499 | 7500 - 14999 | 15000+ |
| **Internal training** | 61.0% | 69.3% | 84.6% | 81.5% | 87.2% |
| **External training** | 26.1% | 17.4% | 19.8% | 14.5% | 16.2% |
| **Certification program** | 6.7% | 10.4% | 13.5% | 13.7% | 24.0% |

## What is the Role of Open Education Resources?

**Open Educational Resources Will be of Value for my Campus - Fall 2011**

| | |
|---|---|
| **Agree** | 56.6% |
| **Neutral** | 38.7% |
| **Disagree** | 4.6% |

**Open Educational Resources Will be of Value for my Campus by Institutional Control - Fall 2009 and Fall 2011**

| | Private for-profit | Private nonprofit | Public |
|---|---|---|---|
| **2009** | 49.8% | 44.6% | 56.5% |
| **2011** | 72.4% | 45.5% | 60.9% |

**Open Educational Resources Will be of Value for my Campus by Overall Enrollment - Fall 2009 and Fall 2011**

| | Under 1500 | 1500 - 2999 | 3000 - 7499 | 7500 - 14999 | 15000+ |
|---|---|---|---|---|---|
| **2009** | 47.5% | 54.1% | 55.4% | 48.4% | 49.5% |
| **2011** | 56.7% | 57.6% | 58.0% | 57.7% | 47.5% |

**Awareness of Open Educational Resources - Fall 2011**

| | |
|---|---|
| **Very aware** | 13.5% |
| **Aware** | 37.7% |
| **Somewhat aware** | 35.5% |
| **Not aware** | 13.3% |

### Percent Aware or Very Aware of Open Educational Resources by Online Offerings - Fall 2011

| | Courses and full programs | Courses only | No offerings |
|---|---|---|---|
| Aware or very aware | 59.4% | 49.8% | 28.3% |

### Use of Open Educational Resources by Course Type - Fall 2011

| | Online | Blended | Face-to-face |
|---|---|---|---|
| Not currently use - unsure if will implement | 12.9% | 10.8% | 16.0% |
| Not currently use, but plan to implement | 13.2% | 15.9% | 9.1% |
| Currently Use | 50.2% | 46.4% | 51.0% |
| Do Not Use | 23.7% | 26.9% | 23.9% |

### Opinions About Open Educational Resources – Fall 2011

| | Strongly Agree | Agree |
|---|---|---|
| Will never be accepted by my faculty | .5% | 7.9% |
| Are not yet of sufficient quality for my institution | 1.8% | 17.6% |
| Would be much more useful if there was a single clearinghouse | 20.0% | 39.3% |
| Have the potential to save my institution money | 17.7% | 47.5% |

## What is the Future for Online Enrollment Growth?

**ENROLLMENT CHANGE FOR ONLINE PROGRAMS BY DISCIPLINE - FALL 2010 AND FALL 2011**

| | Health professions | | Liberal arts and sciences | | Social sciences and history | | Psychology | |
|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 |
| **Declined** | 2% | 1.2% | 4% | 3.5% | 3% | 2.8% | 3% | 8.8% |
| **Steady** | 31% | 30.8% | 32% | 39.6% | 35% | 50.8% | 35% | 42.7% |

| | Business | | Education | | Computer and information sciences | | Engineering | |
|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 |
| **Declined** | 8% | 7.0% | 9% | 16.1% | 6% | 9.6% | 14% | 6.8% |
| **Steady** | 31% | 42.0% | 37% | 34.4% | 41% | 44.2% | 38% | 44.4% |

**PROPORTION OF ONLINE PROGRAMS WITH STEADY OR DECLINING ENROLLMENTS BY INSTITUTIONAL CONTROL - FALL 2011**

| | Private for-profit | Private nonprofit | Public |
|---|---|---|---|
| **Enrollment Declined** | 19% | 7% | 5% |
| **Steady Enrollment** | 36% | 39% | 41% |

# Babson Survey Research Group

The study design, survey administration, analysis and report production for this series of online learning reports are the responsibility of the Babson Survey Research Group.

The Babson Survey Research Group in the Arthur M. Blank Center for Entrepreneurial Research at Babson College conducts regional, national, and international research projects, including survey design, sampling methodology, data integrity, statistical analyses and reporting.

## Upcoming Reports

- International Study of Online Learning for Hospitality Programs, 2012
- Online Learning among Faith-based Colleges and Universities, 2012

## Sloan Series of National and Regional Surveys of Online Education

- 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
- Making the Grade: Online Education in the United States, 2006 - Midwestern Edition
- Making the Grade: Online Education in the United States, 2006 - Southern Edition
- Growing by Degrees: Online Education in the United States, 2005
- Growing by Degrees: Online Education in the United States, 2005 - Southern Edition
- 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


## Sloan K-12 Online Learning Survey Reports

- Online Learning In Illinois High Schools: Has The Time Come?
- 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


## The A·P·L·U-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

**Going the Distance: Online Education in the United States, 2011** is the ninth annual report on the state of online learning among higher education institutions in the United States. The study is aimed at answering some of the fundamental questions about the nature and extent of online education. Based on responses from over 2,500 colleges anduniversities, the report addresses the following key issues:

- Is Online Learning Strategic?
- How ManyStudents are Learning Online?
- Are Learning Outcomes in Online Comparable to Face-to-Face?
- Has Faculty Acceptance of Online Increased?
- What Training Do Faculty Receive for Teaching Online?
- What is the Role of Open Education Resources?
- What is the Future for Online Enrollment Growth?

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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