Growing by Degrees

Online Education in the United States, 2005

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CONTENTS

Executive Summary

Growing by Degrees: Online Education in the United States, 2005 represents the third annual report on the state of online education in U.S. Higher Education. This year's study, like those for the previous two years, is aimed at answering some of the fundamental questions about the nature and extent of online education. Supported by the Alfred P. Sloan Foundation and based on responses from over 1,000 colleges and universities, the study addresses the following key questions:

Have the course and program offerings in online education entered the mainstream?

Background: *Last year's study,* Entering the Mainstream: The Quality and Extent of Online Education in the United States, 2003 and 2004 *suggested that online education was penetrating the institutions of higher education in both size and breadth of programs and courses. Is online education now part of the mainstream of higher education?*

The evidence: The answer to this question appears to clearly be "Yes:" schools are offering a large number of online courses, and there is great diversity in the courses and programs being offered:

- Sixty-five percent of schools offering graduate face-to face courses also offer graduate courses online.

- Sixty-three percent of schools offering undergraduate face-to face courses also offer undergraduate courses online.

- Among all schools offering face-to-face Master's degree programs, 44% also offer Master's programs online.

- Among all schools offering face-to-face Business degree programs, 43% also offer online Business programs.

WHO IS TEACHING ONLINE?

Background: *When institutions move to embrace online education, do they do so at the expense of their current core faculty? If a greater proportion of online courses are being taught by adjunct faculty, hired on a per-course basis, it may mean fewer opportunities for core faculty members, and, some would argue, lower course quality. Some have claimed that the move to online education will cost jobs for core faculty. Does the evidence support this concern?*

The evidence: Staffing for online courses does not come at the expense of core faculty. Institutions use about the same mixture of core and adjunct faculty to staff their online courses as they do for their face-to-face courses. Instead of more adjunct faculty teaching online courses, the opposite is found; overall, there is a slightly greater use of core faculty for teaching online than for face-to-face.

- Sixty-five percent of higher education institutions report that they are using primarily core faculty to teach their online courses compared to 62% that report they are using primarily core faculty to teach their face-to-face courses.

- Seventy-four percent of Public colleges report that their online courses are taught by core faculty, as opposed to only 61% for their face-to-face courses.

- Except for the largest schools (15000+ enrollment), all sized schools report an equal or greater rate of online courses being taught primarily by core faculty compared to their face-to-face courses.

IS ONLINE EDUCATION BECOMING PART OF LONG-TERM STRATEGY FOR MOST SCHOOLS?

Background: *Approximately one-half of all institutions rated online education as important for their long-term strategy in our two previous studies. This belief was not consistent across all types of institutions, however. Small schools and private, nonprofit institutions were the least likely to support this view. Have opinions changed over time? Do more institutions now agree that online education is an important long-term strategy, and has this changed for specific subgroups of institutions?*

The evidence: The evidence from higher education's academic leaders suggests that there is a strong trend upwards in considering online education as part of a school's long-term strategy. While there is some diversity in response to this question, there is growth among all types of schools:

- The overall percent of schools identifying online education as a critical long-term strategy grew from 49% in 2003 to 56% in 2005.

- The largest increases were seen in Associates degree institutions where 72% now agree that it is part of their institution's long-term strategy, up from 58% in 2003.

- The smallest schools, private nonprofit institutions and Baccalaureate colleges remain the least likely to agree that online education is part of their long-term strategy.

Have online enrollments continued their rapid growth?

Background: *Last year's study reported a 22.9% overall increase in the number of students taking one or more online courses, growing from 1.60 to 1.98 million students. Schools were optimistic about future growth as well, with 74.8% reporting that they expected their online enrollments to increase. Has the rapid growth in online enrollments continued for another year?*

The evidence: Growth has continued at a healthy rate, but not as rapidly as last year. The increase in the overall number of online learners was the same this year as last (an increase of around 360,000 each year) for an overall enrollment growth rate of 18.2%. This growth rate greatly exceeds the overall growth rate in the higher education student body.

- Overall online enrollment increased from 1.98 million in 2003 to 2.35 million in 2004.

- The online enrollment growth rate is over ten times that projected by the National Center for Education Statistics for the general postsecondary student population.

- In the aggregate, survey respondents do a reasonable job in predicting changes in online enrollments, but individual schools were often inaccurate in their 2003 predictions of their 2004 online enrollments.

What else do Chief Academic Officers and faculty believe about online education?

Background: *Our previous studies have shown that Chief Academic Officers believe, in general, that online courses are of equal quality to face-to-face and that students are as satisfied with online as with face-to-face courses. They have also expressed reservations about their faculty's acceptance of online education. Have Chief Academic Officers changed in their beliefs about faculty acceptance of online education?*

The evidence: There is some good news for online education, but the opinions of Chief Academic Officers also raise a number of challenges. On the positive side, they believe it is no harder to evaluate online courses than those delivered face-to-face. More challenging, however, is that Academic leaders believe that online courses require more effort for faculty and more discipline by students, and many of them continue to believe that their faculty have not accepted the value of online education.

- Chief Academic Officers believe, in general, that it takes more effort to teach online.

- A large majority of respondents (64%) believe that it takes more discipline for a student to succeed in an online course.

- Although online education continues to penetrate into all types of institutions, a relatively stable minority of Chief Academic Officers (28% in 2003 compared with 31% in 2005) continue to believe that their faculty fully accept the value and legitimacy of online education.

- Eighty-two percent of respondents believe that it is no more difficult to evaluate the quality of an online course than one delivered face-to-face.

What is Online Learning?

The focus of this report is online education. In order to be consistent with previous work, we have applied the same definitions used in our prior 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.

The primary focus of this report, online courses, are defined as having at least 80% of the course content delivered online. The combination of two of the classifications listed below (traditional and web facilitated) is used as the definition of "face-to-face" instruction (in other words, a course with zero to 29% of the content delivered online) The remaining alternative, blended courses (sometimes called hybrid courses) are defined as having between 30% and 80% of the course content delivered online. While the survey asked respondents for information on all types of courses, results of the analysis of blended options will be presented in a future publication; the current report is devoted to online only.

While there is a great deal of 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 with no online technology used — content is delivered in writing or orally.
1 to 29%	Web Facilitated	Course which uses web-based technology to facilitate what is essentially a face-to-face course. Uses a course management system (CMS) or web pages to post the syllabus and assignments, for example.
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 some 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, continuing education, etc.). Likewise, respondents were asked to characterize their face-to-face, blended, and online program offerings for certificate, associate, bachelors, masters, doctoral, and professional programs.

Detailed Survey Findings

Online Course and Program Offerings are Mainstream

The number of students who study online has been increasing at a rate far in excess of the rate of growth in the overall higher education student population. The two previous reports in this series, *Sizing the Opportunity: The Quality and Extent of Online Education in the United States, 2002 and 2003* and *Entering the Mainstream: The Quality and Extent of Online Education in the United States, 2003 and 2004*, have demonstrated both the continued growth in the numbers of online students and the wide variety of institutions that provide online offerings. Less well known, however, is how closely an institution's online offerings match those of their face-to-face offerings. Have institutions selected a small number of areas to experiment with online, while leaving the bulk of their offerings as face-to-face only? Is online concentrated only among non-degree electives and not part of the core curriculum?

In answering these questions, it is important to understand that higher education institutions vary in the types of courses, programs, and disciplines that they offer. Of interest to those studying the nature and extent of online education is the extent to which institutions that provide a particular type of offering also provide the same type of offering in an online setting. The following analysis examines the penetration rate for online offerings by course type, program type, and program discipline. In other words, what proportion of institutions that offer a particular type of face-to-face course or program also provide the same type of offering online?

Online Course Offerings becoming Pervasive

Those skeptical of the growth in online enrollment numbers have posited that what we are observing may be large numbers of students in non-core programs and courses, with little impact on the institution's core offerings. It could be argued that online education can not be a formidable force in U.S. higher education if the only areas where it is having a major impact are at the fringes—for non-credit courses or non-degree programs. The evidence from this year's study refutes this view; online education has made strong inroads in the core offerings for most types of institutions.

Eighty-nine percent of all institutions offer face-to-face undergraduate-level courses, and 55% of all institutions offer online undergraduate-level courses. This means that 62.5% of all those institutions that offer undergraduate face-to-face courses also offer the same level course online; in other words, online has a 62.5% penetration rate for undergraduate-level courses. Far fewer institutions provide graduate-level courses (only 26%), but the percentage of these that also have an online offering is actually slightly higher (65%) than the penetration rate for undergraduate courses. This analysis does not address the *number* of courses that institutions offer in face-to-face and online modes, only if they offer any or not.

These penetration rates are more dramatic among Doctoral institutions and mid-size (3000–7499 students) schools. Among Doctoral institutions with graduate and undergraduate face-to-face courses, 79% also offer graduate courses online and 64% offer undergraduate courses online. Among mid-sized schools offering graduate and undergraduate face-to-face courses, 80% are also offering undergraduate courses online and 70% are offering graduate courses online.

ONLINE COURSE PENETRATION - FALL 2004

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Undergraduate Level	64.3%	67.6%	33.9%	77.5%	31.7%
Graduate Level	78.9%	65.8%	32.2%	100.0%	58.2%
Continuing Education	74.1%	48.5%	29.1%	70.8%	26.3%

The 100% penetration rate for graduate-level courses among Associates institutions bears mentioning. Most institutions classified as *Associates* are two-year schools, but a few offer graduate-level courses. The 100% figure indicates that there are very small but equal numbers of Associates institutions with face-to-face and online graduate-level offerings.

Survey responses also refute the notion that "non-core" Continuing Education courses account for the bulk of the growth in online learning. While the penetration rate for Continuing Education courses is relatively high (56%), the rates for undergraduate and graduate instruction are even higher. The conclusion is that growth in online course offerings is occurring at all levels —undergraduate and graduate as well as Continuing Education.

Online Program Offerings Show Wide Adoption

ONLINE PROGRAM PENETRATION - FALL 2004

Certificate Program	35.3%
Associate Program	39.8%
Bachelors Program	29.9%
Masters Program	43.6%
Doctoral Program	12.4%
Professional Program	15.3%

A similar pattern of broad penetration is found when we examine online programs. Online certificate, professional and traditional degree programs go hand in hand with face-to-face programs. Forty-four percent of schools offering face-to-face Master's programs also offer Master's programs online, the highest penetration rate for any program type. The figure is even more impressive among specific subgroups of institutions. The penetration rate for Master's programs rises to 56% in Public institutions and to 78% in Private, for-profit institutions. Doctoral institutions also have a relatively high penetration rate (66%) for Master's programs.

Programs at the Associate level have the next highest overall penetration rate, with four out of every ten schools with face-to-face Associate's programs also offering at least one online version. The Associates and Doctoral/Research institutions represent the bulk of these offerings, but approximately one-quarter of all other school types with Associate's programs also offer online alternatives.

Certificate programs show the widest range of penetration by type of institution. Doctoral/Research institutions lead all others, with a penetration rate of 60%. Very few Baccalaureate institutions offer face-to-face Certificate programs (only 29%) and only a small fraction of these (17%) provide an online Certificate offering.

Programs at the Bachelor's level are offered in face-to-face format by over 90% of all Doctoral/Research, Master's, and Baccalaureate institutions. Of these, however, it is only the Doctoral/Research and Master's institutions that provide online program offerings in any great numbers (with penetration rates of 38% for Doctoral and 34% for Masters). Only 19% of Baccalaureate institutions that offer face-to-face Baccalaureate programs also offer at least one online version of a program. This result is no surprise given the generally negative opinion that these institutions have towards online education across a number of issues (reported elsewhere in this and previous reports).

With respect to school size, the largest schools (15000+ students) are most likely to offer both online and face-to-face Master's programs (69%). This pattern is repeated for most other program offerings as well; the smallest institutions have the lowest penetration rates across almost all program categories. The higher penetration rates among the largest schools may stem from a number of factors. Public institutions, which lead in online offerings, tend to be large, but there also may be an economy of scale and availability of resources issue at work as well. The largest institutions are the ones that have the most resources, and therefore, potentially, the greatest ability to move to new types of offerings.

ONLINE PROGRAM PENETRATION - FALL 2004

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Certificate Program	60.3%	40.8%	17.2%	32.2%	22.8%
Associate Program	43.9%	23.3%	25.7%	42.8%	23.0%
Bachelors Program	38.4%	34.4%	19.0%	23.1%	22.8%
Masters Program	65.7%	45.3%	25.8%	50.0%	35.0%
Doctoral Program	16.4%	13.3%	0.0%	0.0%	9.3%
Professional Program	24.7%	11.9%	11.1%	19.0%	8.4%

Doctoral and Professional programs have notably lower overall penetration rates than other program types. It is the Doctoral/Research institutions that are the primary providers of the face-to-face Doctoral and Professional programs. All other institution types have low rates of face-to-face offerings for these programs; very few offer any online alternatives either. Since it is Doctoral/Research institutions which have the highest penetration rates for other programs (e.g., Master's, Certificate), this may indicate that Doctoral/Research institutions are more selective in what types of programs are offered online.

Most Discipline Areas Well Represented Online

In addition to asking if institutions offer courses and programs at particular levels, it is important to understand what discipline areas these courses and programs cover. Questions on program penetration by discipline areas were collected in our 2004 survey and are presented here. Among disciplines being offered, business program offerings have the highest penetration rate with 43% of colleges offering face-to-face business programs also offering online business programs. Business programs are followed closely by liberal arts and sciences, general studies, humanities (40%), computer and information sciences (35%), and the catch-all category of all other programs (36%).

The penetration rate for business programs is relatively low among Private, nonprofit institutions (27%), but greater than half (51%) for Public institutions, and is relatively high for Private, for-profit colleges, where 81% with face-to-face also offer a business program online. The pattern is different for the liberal arts and sciences category where 40% of schools offering face-to-face programs also offer online programs. In this case an equal proportion of Public and Private, for-profit institutions offer online programs (55% for both) while a small minority of Private, nonprofit institutions offer online liberal arts and sciences programs (20%).

ONLINE PENETRATION BY PROGRAM DISCIPLINE - FALL 2003

Business	42.7%
Computer and Information Sciences	35.1%
Education	24.9%
Health Professions and Related Sciences	31.4%
Liberal Arts and Sciences, General Studies, Humanities	40.2%
Psychology	23.6%
Social Sciences and History	28.4%
All Other Programs	36.2%

ONLINE PENETRATION BY PROGRAM DISCIPLINE - FALL 2003

	Public	Private, nonprofit	Private, for-profit
Business	51.3%	27.3%	80.5%
Computer and Information Sciences	43.0%	21.6%	51.9%
Education	30.4%	17.6%	50.8%
Health Professions and Related Sciences	35.5%	23.4%	32.3%
Liberal Arts and Sciences, General Studies, Humanities	54.6%	20.2%	55.2%
Psychology	34.4%	9.3%	26.5%
Social Sciences and History	40.7%	11.1%	31.6%

Core Faculty Most Likely to Teach Online

WHO TEACHES ONLINE AND FACE-TO-FACE COURSES, FALL 2004

	Face-to-face	Online
Core	61.6%	64.7%
Split	24.7%	16.4%
Adjunct	13.0%	18.1%

When institutions move to embrace online education, do they do so at the expense of their current core faculty? If a greater proportion of online courses are taught by adjunct faculty, hired on a per-course basis, it may mean fewer opportunities for core faculty members, and, some would argue, lower course quality. Some have claimed that the move to online education will cost jobs for core faculty. The evidence, however, does not support these assertions.

Survey respondents were asked to identify the most appropriate classification of their use of core or adjunct faculty to teach online and face-to-face courses; if it was "Exclusively" one type or the other, "Mostly," or a "Roughly equal mix of core and adjunct faculty." Survey results indicate that core faculty are used to teach online courses about as frequently as they are used to teach face-to-face courses. More colleges report that primarily core faculty teach their online courses than teach their face-to-face courses (65% online vs. 62% face-to-face). While not a significant difference, it shows that the often cited prediction that online courses will rely much more heavily on adjunct faculty has not materialized. Not addressed in this analysis are the numbers of faculty involved at particular schools. An institution beginning to offer online courses may start with core faculty doing the development and initial teaching. Once the number of courses, and therefore the number of faculty needed, grow, the institution may reach out for additional adjunct faculty to handle the load.

When examined in more detail, some greater differences emerge. Public colleges have the most disparity with 74% reporting that online courses are primarily taught by core faculty as compared to 61% for face-to-face courses. Private, for-profit institutions report a similar disparity, as 48% say primarily core faculty are teaching online courses as compared to 39% for face-to-face offerings. The disparity is in the other direction for Private, nonprofit institutions, where 55% report core faculty are teaching online courses and 70% are teaching face-to-face courses.

WHO TEACHES ONLINE AND FACE-TO-FACE COURSES, FALL 2004

	Doctoral/Research		Masters		Baccalaureate		Associates		Specialized	
	Face-to-face	Online	Face-to-face	Online	Face-to-face	Online	Face-to-face	Online	Face-to-face	Online
Core	84.8%	71.2%	68.8%	62.5%	79.1%	60.6%	47.4%	67.6%	65.2%	61.2%
Split	11.4%	12.3%	22.5%	18.5%	14.6%	3.8%	39.1%	21.0%	17.6%	10.0%
Adjunct	3.8%	16.5%	7.7%	18.1%	5.6%	35.6%	13.2%	10.0%	16.1%	28.9%

School size appears to be a factor in who is teaching online. Mid-size schools show a wider disparity, with more online courses taught by core faculty than face-to-face courses (71% online vs. 59% face-to-face for schools with 3000–7499 students and 69% online vs. 54% face to face for schools with 7500–15000 students). The largest schools (15000+ students) had a somewhat smaller disparity between core and adjunct faculty (85% online vs. 78% face-to-face), while there was little disparity between the use of core and adjunct faculty at smaller schools.

While Doctoral, Master's and Baccalaureate institutions had larger percentages of core faculty teaching face-to-face courses, Associates institutions indicated that online courses are much more likely to be taught by core faculty (68%) as compared to face-to-face courses (47%).

Online Enrollments Show Steady Growth

The number of students taking at least one online course is now over two million, with over 2.3 million total students in Fall 2004. Overall online enrollment increased from 1,971,397 in Fall 2003 to 2,329,783 for Fall 2004. The number of new students added to those studying online matched the number added for the previous year (around 360,000 in both cases).

The National Center for Education Statistics issues enrollment projections annually. The most recent of these, *Projections of Education Statistics to 2014*, provides three alternative projections for total enrollments for all degree-granting postsecondary institutions. The projected growth rates for the comparable period (2003 to 2004) range from a low of 0.87% to a high of 1.31%. These numbers are dwarfed by the 18.2% rate observed for the growth of the online enrollments.

NUMBER OF STUDENTS TAKING AT LEAST ONE ONLINE COURSE

Time Period	Number of Students
Reported for Fall 2002:	1,602,970
Predicted Spring 2003 for Fall 2003:	1,920,734
Reported for Fall 2003:	1,971,397
Predicted Spring 2004 for Fall 2004:	2,634,189
Reported for Fall 2004:	2,329,783

The online enrollment growth, while substantial, did not measure up to what schools themselves had predicted in 2003 (2.6 million) and the year-to-year growth rate of 18.2% for 2003 to 2004 is somewhat lower than the 22.9% rate observed from 2002 to 2003. This may indicate that the growth rate, while both substantial and steady, has reached a plateau. It will be very interesting to observe what happens in the coming years.

While schools do a decent job of predicting future enrollments in the aggregate, individual schools are often inaccurate when predicting their future online enrollments. Of the schools that predicted that their online enrollments would grow by at least 2% between Fall 2003 and Fall 2004, 50% grew, 8% stayed the same (between 98% and 102% of the previous enrollment), and 42% actually decreased. Conversely, of all the schools that expected their online enrollment to stay the same from Fall 2003 to Fall 2004, 64% had growth, 7% stayed within 2%t of the previous enrollment, and 30% had a decrease. While the proportion of schools with decreases was surprisingly large, given that virtually none had predicted a decrease, the actual size of the enrollment decline was generally quite small (typically a few percent).

While schools may not always make accurate predictions of their future enrollments, it still is useful to understand what level of growth they are expecting. Among all institutions with any online enrollments for Fall 2004, the predicted mean growth rate for Fall 2005 was 19.9%, with a median of 10.0%. The growing enthusiasm for online learning among the Private, for-profit sector is evidenced again here, with a predicted mean growth rate of 44.6%. This number is skewed by a small number of institutions expecting extremely large growth, but even the median expected growth rate (15.0%) for this group is substantial.

Online Education is Part of Long-Term Strategy for Most Schools

The proportion of institutions which believe that online education is important to their long-term strategy continues to increase, growing from 48% of all institutions in 2003 to 53% in 2004 and 56% in 2005. Academic leaders were asked to rate their level of agreement with the statement "Online education is critical to the long-term strategy of *[their institution]*."

Associates institutions show the sharpest increase over the last three years, moving from 58% to 67% to 72%. By contrast, only 28% of Chief Academic Officers in Baccalaureate schools identified online education as a critical strategy in 2005.

Online Education is Critical to Long-Term Strategy: 2003, 2004, and 2005

	2003	2004	2005
Agree	48.8%	53.5%	56.0%
Neutral	38.1%	33.7%	30.9%
Disagree	13.1%	12.9%	13.1%

A large majority of colleges of all sizes (except for schools under 1500 students) believe online education is critical to their long term strategy (ranging from 61% to 71%).

Public institutions continue to express a strong belief that online education is key to their long-term strategy (67% in 2003, 66% in 2004, and 74% in 2005). However, Private, nonprofit schools which make this part of their long-term strategy are still in the minority, but the percentage continues to increase (from 35% in 2003 to 37% in 2004 to 41% in 2005).

Teaching Online Requires More Time and Effort

Teaching an Online Course Takes More Faculty Time and Effort

	No Online	Have Online
Agree	29.1%	38.2%
Neutral	64.5%	54.7%
Disagree	6.4%	7.1%

Most academic leaders (58%) are neutral on the statement "Teaching an online course takes more faculty time and effort than teaching a face-to-face course." About one-third (35%) believe that it takes more time and effort to teach online, while only 7% believe that it takes less time and effort.

Surprisingly, it is the institutions which have online offerings that feel most strongly about this. Among schools that offer no online courses, 65% believe there is no difference in the effort required while 6% believe less effort is required, and 29% believe more effort is required. In schools that do offer online courses, a higher percentage (38%) believe it takes more effort and faculty time, while 55% believe the effort is the same, and 7% believe less faculty time and effort are required.

Students Require More Discipline to Complete Online Courses

A majority of respondents (64%) agree with the statement "Students need more discipline to succeed in an online course than in a face-to-face course." This belief is greatest in Associates institutions where 80% responded that students need more discipline to succeed in online courses. This is an interesting finding, given that Associates schools are among those with both the most positive views on online education and some of the highest penetration rates. Clearly, these schools do not view the need for increased student discipline as a strong inhibiting factor for online education.

Students Need More Discipline to Succeed in an Online Course

	No Online	Have Online
Agree	54.4%	70.0%
Neutral	40.5%	27.4%
Disagree	5.2%	2.6%

A significantly larger proportion of Public and Private nonprofit colleges than Private for-profit colleges also believe that it takes more discipline for students to succeed online (72% for Public and 73% for Private, for-profit institution vs. 56% in Private, nonprofit schools). A majority of respondents from institutions of all sizes agreed that more discipline is necessary to succeed in an online course (ranging from 53% to 69%). Institutions which offer online education were also much more likely to agree that students need more discipline to succeed (70% vs. 54% at institutions with no online courses).

Faculty Acceptance of Online Education Still in Doubt

Although online education continues to penetrate into all types of institutions, only a minority of Chief Academic Officers agree that "Faculty at *[my institution]* accept the value and legitimacy of online education." The level of perceived acceptance has remained relatively stable since 2003 (28% in 2003 compared with 31% in 2005). However, the majority of Chief Academic Officers continue to believe that faculty are neutral on this question; the level of perceived neutrality has declined, but only slightly (65% were neutral in 2003 vs. 59% in 2005).

Faculty Accept the Value of Online Education: 2003 and 2005

	Public		Private, nonprofit		Private, for-profit	
	2003	**2005**	**2003**	**2005**	**2003**	**2005**
Agree	34.2%	36.4%	20.2%	20.6%	28.8%	42.1%
Neutral	63.2%	58.6%	67.6%	62.1%	63.3%	52.9%
Disagree	2.7%	4.9%	12.2%	17.3%	7.8%	5.1%

Attitudes at Public institutions toward positive faculty acceptance of online education have not changed much from 2003 (34%) to 2005 (36%). Attitudes at Private, nonprofit schools have also changed little during this period (20% in 2003 vs. 21% in 2005). Academic leaders at Public institutions had the most positive view of their faculty's attitude toward online education in 2003. However, academic leaders at Private, for-profit schools are now more likely to believe that their faculty accept the value and legitimacy of online education (42% in 2005).

Examining these results by Carnegie class, only Associates and Specialized institutions show an increase in this belief of legitimacy while all other types of colleges show a decrease in a belief that faculty see the value of online education. Offering online courses may imply a higher degree of legitimacy in the Chief Academic Officer's response. However, this factor only increases the number of institutions indicating that faculty accept the value and legitimacy of online education to 40% while dropping it to 13% in schools without online courses.

Academic leaders are being asked for the overall attitude of their entire faculty for this question. The question does not address if specific subgroups of faculty hold different beliefs. As more faculty become familiar with online education, will the perception of faculty attitudes change? With the single exception of Private, for-profit institutions, there is no evidence that the increased penetration of online courses and programs in higher education has led to a greater level of perceived acceptance of online education on the part of faculty.

Evaluating Online Courses No More Difficult than Face-to-face

Online education is a new experience for many faculty and academic administrators. Lessons learned over a lifetime of teaching may or may not apply in the online setting. One concern that has been raised over time is whether it will be more difficult to evaluate your online offerings than face-to-face courses? Will the "distance" between the student and the instructor hinder the ability to assess the pedagogical impact of the course?

It is More Difficult to Evaluate the Quality of an Online Course - Fall 2004

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Agree	9.7%	14.8%	18.9%	20.3%	20.6%
Neutral	42.9%	52.1%	58.7%	48.8%	56.4%
Disagree	47.4%	33.2%	22.5%	30.9%	23.0%

Academic leaders believe that the evaluation of an online course is no more difficult than for face-to-face instruction. Eighty-two percent of respondents do not agree with the statement "It is more difficult to evaluate the quality of an online course than of a face-to-face course." This response is about the same from institutions which offer online courses (83%) and those which don't (80%).

Fewer Doctoral universities believe it is more difficult to evaluate quality than all other Carnegie classifications (10% vs. 15% Masters, vs. 19% Baccalaureate, vs. 20% Associates, and vs. 21% for Specialized institutions).

Summary of the Findings

- Almost two-thirds of all schools offering face-to-face courses also offer online courses. More than 40% of schools offering Master's degree programs also offer these programs online.

- Business programs have the highest penetration with 43% of schools that offer these as a face-to-face programs also offering at least one online business program.

- While growth did not meet reported expectations from last year's survey, an overall growth rate of 18.2% for online enrollments was reported between Fall 2003 and Fall 2004.

- The online enrollment growth rate of 18.2% is over ten times that projected by the National Center for Education Statistics for the entire postsecondary student population.

- An increasing majority of most types of schools see online education as key to their long-term strategy (exceptions: Private, nonprofit institutions, schools with under 1500 students, and Baccalaureate institutions).

- Most academic leaders are neutral on the statement that it takes more faculty time and effort to teach online, but one-third do believe this to be the case.

- Academic leaders at a majority of all schools believe that the effort and discipline required of students to successfully complete an online course is greater than in face-to-face courses.

- A majority of all schools believe that evaluating the quality of online courses is no more difficult than that of face-to-face courses.

- The increased penetration of online courses and programs has not had a positive impact on perceived faculty acceptance; there continue to be only a small minority of academic leaders that agree that their faculty accept the value and legitimacy of online education.

SURVEY SUPPORT AND METHODOLOGY

The 2005 Sloan Survey of Online Learning was supported by a grant from the Alfred P. Sloan Foundation and is published by the Sloan Consortium at Babson College and Franklin W. Olin College of Engineering. In order to ensure unbiased objectivity, the Sloan Consortium does not have editorial control over the survey design, data capture, data analysis, or presentation of the findings.

The sample for the analysis is composed of all active, degree-granting institutions of higher education in the United States that are open to the Public. An email with a link to a web-based survey form was sent to Chief Academic Officers at these institutions. If there was no designated Chief Academic Officer, the survey was sent to the President of the institution. In some cases, the survey team was notified by the recipient of another, more appropriate, recipient and the survey was forwarded to this individual.

Institutional descriptive data come from IPEDS, described on their web site as:

> *"The Integrated Postsecondary Education Data System (IPEDS), ..., is a system of surveys designed to collect data from all primary providers of postsecondary education. IPEDS is a single, comprehensive system designed to encompass all institutions and educational organizations whose primary purpose is to provide postsecondary education." See http://nces.ed.gov/ipeds/ for more information.*

All sample schools were sent an invitation email and two reminders, inviting their participation and assuring them that no individual responses would be released. New this year, the survey team worked with the Southern Regional Education Board (SREB) on a joint outreach to schools in the SREB-member states. All survey respondents were promised that they would be notified when the report was released and would receive a free copy. SREB member state schools were also promised a report comparing SREB schools to the national results. Of 3216 surveys sent, 1025 responses were received, representing a 31.9% overall response rate. These responses have been merged with the data from the two previous survey years (994 responses in 2003 and 1170 responses in 2004) for examination of changes over time. A stricter definition of "agree" and "disagree" for questions dealing with the level of agreement with particular statements is being used this year; data from previous years used for comparison have been recoded to match the new definition. Additional enrollment data for the for-profit sector was provided by Eduventures, Inc. This information was merged with the data collected for the Sloan Survey to improve the accuracy of enrollment estimates.

After the data were compiled and linked to the IPEDS database, the 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 variables used for producing probability weights included size of the institution, public/private, nonprofit/for-profit, and Carnegie class of school (Doctoral/Research, Masters, Baccalaureate, Associates, and Specialized). To ensure that a different response rate from schools in SREB member states did not bias the results, weights were computed for all of the above characteristics independently for schools in SREB states and for those in all other states. These weights provided 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.

APPENDIX

ONLINE COURSE OFFERINGS BECOMING PERVASIVE

ONLINE COURSE PENETRATION - FALL 2004

Undergraduate Level	62.5%
Graduate Level	65.2%
Continuing Education	56.2%

ONLINE COURSE PENETRATION - FALL 2004

	Enrollment Size				
	Under 1500	**1500–2999**	**3000–7499**	**7500–14999**	**15000+**
Undergraduate Level	46.6%	68.3%	80.2%	89.9%	78.3%
Graduate Level	55.6%	57.6%	69.5%	84.1%	84.2%
Continuing Education	39.0%	60.5%	57.2%	79.8%	74.7%

ONLINE PROGRAM OFFERINGS SHOW WIDE ADOPTION

ONLINE PROGRAM PENETRATION - FALL 2004

	Public	**Private, nonprofit**	**Private, for-profit**
Certificate Program	45.4%	25.8%	20.4%
Associate Program	50.7%	18.9%	43.3%
Bachelors Program	37.6%	20.7%	64.4%
Masters Program	55.9%	34.9%	77.5%
Doctoral Program	13.1%	9.5%	62.5%
Professional Program	27.1%	8.1%	0.0%

Online Program Penetration - Fall 2004

	Enrollment Size				
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Certificate Program	19.7%	37.8%	49.9%	52.1%	68.4%
Associate Program	31.7%	44.3%	55.6%	35.8%	57.1%
Bachelors Program	26.9%	25.8%	36.4%	38.7%	39.1%
Masters Program	31.1%	43.4%	45.1%	59.9%	69.0%
Doctoral Program	5.6%	17.1%	6.7%	14.1%	17.4%
Professional Program	9.5%	2.4%	10.4%	21.4%	34.5%

MOST DISCIPLINE AREAS WELL REPRESENTED ONLINE

Online Penetration by Program Discipline - Fall 2003

	Enrollment Size				
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Business	21.4%	45.5%	50.8%	52.5%	45.3%
Computer and Information Sciences	20.4%	26.7%	42.4%	51.8%	41.7%
Education	14.2%	16.5%	27.7%	44.5%	34.7%
Health Professions and Related Sciences	20.6%	22.9%	31.6%	45.3%	50.2%
Liberal Arts and Sciences, General Studies, Humanities	26.3%	38.0%	46.3%	55.2%	43.9%
Psychology	11.0%	20.1%	30.4%	37.2%	24.9%
Social Sciences and History	14.2%	28.6%	33.2%	42.8%	27.0%

Online Penetration by Program Discipline - Fall 2003

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Business	36.9%	37.9%	19.2%	56.3%	54.3%
Computer and Information Sciences	30.5%	22.9%	15.2%	52.1%	44.6%
Education	39.0%	32.4%	9.6%	24.9%	27.9%
Health Professions and Related Sciences	59.0%	32.2%	16.0%	28.2%	43.4%
Liberal Arts and Sciences, General Studies, Humanities	36.7%	28.6%	11.8%	63.7%	34.7%
Psychology	12.2%	13.4%	7.3%	44.8%	21.1%
Social Sciences and History	16.3%	17.0%	10.0%	51.3%	26.5%

Core Faculty Most Likely to Teach Online

Who Teaches Online and Face-to-face Courses - Fall 2004

	Under 1500		1500–2999		3000–7499		7500–14999		15000+	
	Face-to-face	Online	Face-to-face	Online	Face-to-face	Online	Face-to-face	Online	Face-to-face	Online
Core	58.8%	56.3%	67.3%	67.2%	59.3%	70.6%	54.3%	68.5%	84.8%	77.6%
Split	22.6%	16.8%	25.6%	14.2%	28.5%	17.8%	35.7%	20.0%	13.7%	13.7%
Adjunct	17.8%	25.4%	6.6%	17.9%	11.7%	11.2%	8.2%	11.5%	1.5%	8.7%

Who Teaches Online and Face-to-face Courses - Fall 2004

	Public		Private, nonprofit		Private, for-profit	
	Face-to-face	Online	Face-to-face	Online	Face-to-face	Online
Core	60.7%	74.1%	70.4%	55.2%	39.4%	47.8%
Split	30.7%	17.1%	18.8%	17.7%	25.5%	10.4%
Adjunct	8.3%	8.7%	9.8%	26.7%	34.5%	37.4%

Online Enrollments Show Steady Growth

Predicted Percent Increase in Online Enrollment 2004 to 2005

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Mean	11.5%	21.1%	33.1%	13.9%	19.1%
Median	10.0%	5.6%	6.0%	10.0%	10.0%

Predicted Percent Increase in Online Enrollment 2004 to 2005

	Enrollment Size				
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Mean	24.6%	19.4%	17.5%	13.5%	13.8%
Median	10.0%	10.0%	6.7%	10.0%	10.0%

Predicted Percent Increase in Online Enrollment 2004 to 2005

	Public	Private, nonprofit	Private, for-profit
Mean	15.0%	21.8%	44.6%
Median	8.0%	8.0%	15.0%

ONLINE EDUCATION IS PART OF LONG-TERM STRATEGY FOR MOST SCHOOLS

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY - 2005

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Agree	52.4%	55.7%	27.7%	72.2%	46.5%
Neutral	35.8%	36.8%	37.9%	22.1%	34.8%
Disagree	11.8%	7.5%	34.5%	5.6%	18.7%

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY - 2005

	Enrollment Size				
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Agree	47.3%	61.2%	66.9%	71.3%	67.5%
Neutral	37.3%	21.6%	26.6%	24.1%	25.6%
Disagree	15.4%	17.2%	6.5%	4.6%	6.9%

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY - 2005

	Public	Private, nonprofit	Private, for-profit
Agree	73.9%	41.0%	52.9%
Neutral	21.1%	37.0%	38.2%
Disagree	5.0%	22.0%	8.9%

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY - 2005

	No Online	Have Online
Agree	23.6%	74.4%
Neutral	48.0%	21.2%
Disagree	28.3%	4.4%

Teaching Online Requires More Time and Effort

Teaching an Online Course Takes More Faculty Time and Effort - 2005

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Agree	33.6%	40.9%	26.4%	41.7%	31.6%
Neutral	56.8%	55.9%	62.6%	50.6%	63.5%
Disagree	9.6%	3.3%	11.0%	7.7%	4.9%

Teaching an Online Course Takes More Faculty Time and Effort - 2005

	Enrollment Size				
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Agree	32.9%	34.9%	44.5%	41.3%	23.2%
Neutral	60.0%	59.4%	49.1%	48.4%	71.9%
Disagree	7.1%	5.7%	6.3%	10.3%	4.9%

Teaching an Online Course Takes More Faculty Time and Effort - 2005

	Public	Private, nonprofit	Private, for-profit
Agree	42.0%	34.4%	20.8%
Neutral	51.1%	58.1%	74.4%
Disagree	6.9%	7.4%	4.8%

Teaching an Online Course Takes More Faculty Time and Effort - 2005

	No Online	Have Online
Agree	29.1%	38.2%
Neutral	64.5%	54.7%
Disagree	6.4%	7.1%

STUDENTS REQUIRE MORE DISCIPLINE TO COMPLETE ONLINE COURSES

STUDENTS NEED MORE DISCIPLINE TO SUCCEED IN AN ONLINE COURSE - 2005

	Doctoral/ Research	Masters	Baccalaureate	Associates	Specialized
Agree	41.0%	57.3%	51.8%	79.7%	57.7%
Neutral	54.2%	41.2%	40.5%	18.1%	39.1%
Disagree	4.8%	1.5%	7.7%	2.3%	3.2%

STUDENTS NEED MORE DISCIPLINE TO SUCCEED IN AN ONLINE COURSE - 2005

	Enrollment Size				
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Agree	65.9%	62.5%	68.9%	61.3%	52.7%
Neutral	30.1%	34.2%	28.7%	37.2%	43.8%
Disagree	4.1%	3.4%	2.3%	1.4%	3.4%

STUDENTS NEED MORE DISCIPLINE TO SUCCEED IN AN ONLINE COURSE - 2005

	Public	Private, nonprofit	Private, for-profit
Agree	71.5%	56.0%	72.6%
Neutral	25.9%	39.6%	24.5%
Disagree	2.5%	4.4%	2.9%

STUDENTS NEED MORE DISCIPLINE TO SUCCEED IN AN ONLINE COURSE - 2005

	No Online	Have Online
Agree	54.4%	70.0%
Neutral	40.5%	27.4%
Disagree	5.2%	2.6%

FACULTY ACCEPTANCE OF ONLINE EDUCATION STILL IN DOUBT

FACULTY ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION: 2003 AND 2005

	Under 1500		1500–2999		3000–7499		7500–14999		15000+	
	2003	2005	2003	2005	2003	2005	2003	2005	2003	2005
Agree	23.8%	30.0%	25.7%	26.8%	33.2%	37.3%	29.6%	23.8%	34.1%	32.8%
Neutral	66.5%	58.0%	65.4%	61.2%	61.2%	55.9%	66.8%	74.1%	64.7%	55.7%
Disagree	9.6%	12.1%	8.9%	12.0%	5.6%	6.8%	3.7%	2.1%	1.2%	11.4%

FACULTY ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION: 2003 AND 2005

	Doctoral/ Research		Masters		Baccalaureate		Associates		Specialized	
	2003	2005	2003	2005	2003	2005	2003	2005	2003	2005
Agree	23.6%	18.2%	23.9%	24.2%	17.6%	13.5%	35.4%	39.5%	19.6%	28.0%
Neutral	73.3%	71.4%	71.2%	67.3%	61.7%	58.7%	59.5%	57.4%	73.7%	56.4%
Disagree	3.2%	10.4%	4.9%	8.5%	20.8%	27.8%	5.2%	3.1%	6.7%	15.6%

EVALUATING ONLINE COURSES NO MORE DIFFICULT THAN FACE-TO-FACE

It is More Difficult to Evaluate the Quality of an Online Course - 2005

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Agree	9.7%	14.8%	18.9%	20.3%	20.6%
Neutral	42.9%	52.1%	58.7%	48.8%	56.4%
Disagree	47.4%	33.2%	22.5%	30.9%	23.0%

It is More Difficult to Evaluate the Quality of an Online Course - 2005

	Enrollment Size				
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Agree	19.6%	20.6%	16.0%	16.6%	9.3%
Neutral	58.6%	49.4%	39.7%	43.3%	47.1%
Disagree	21.7%	29.9%	44.2%	40.1%	43.6%

It is More Difficult to Evaluate the Quality of an Online Course - 2005

	Public	Private, nonprofit	Private, for-profit
Agree	16.8%	19.1%	20.8%
Neutral	46.0%	55.1%	58.2%
Disagree	37.2%	25.8%	21.0%

It is More Difficult to Evaluate the Quality of an Online Course - 2005

	No Online	Have Online
Agree	19.1%	17.6%
Neutral	67.7%	43.5%
Disagree	13.1%	39.0%

Growing by Degrees: *Online Education in the United States, 2005* represents the third annual report on the state of online education in U.S. Higher Education. Supported by the Alfred P. Sloan Foundation and based on responses from over 1,000 colleges and universities, this year's study, like those for previous years', is aimed at answering some of the fundamental questions about the nature and extent of online education:

- Have the course and program offerings in online education entered the mainstream?

- Who is teaching online?

- Is online education becoming part of long-term strategy for most schools?

- Have online enrollments continued their rapid growth?

- Do Chief Academic Officers and faculty believe in online education?

The survey analysis is based on a comprehensive nationwide sample of all active, degree-granting institutions of higher education in the United States that are open to the Public.

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