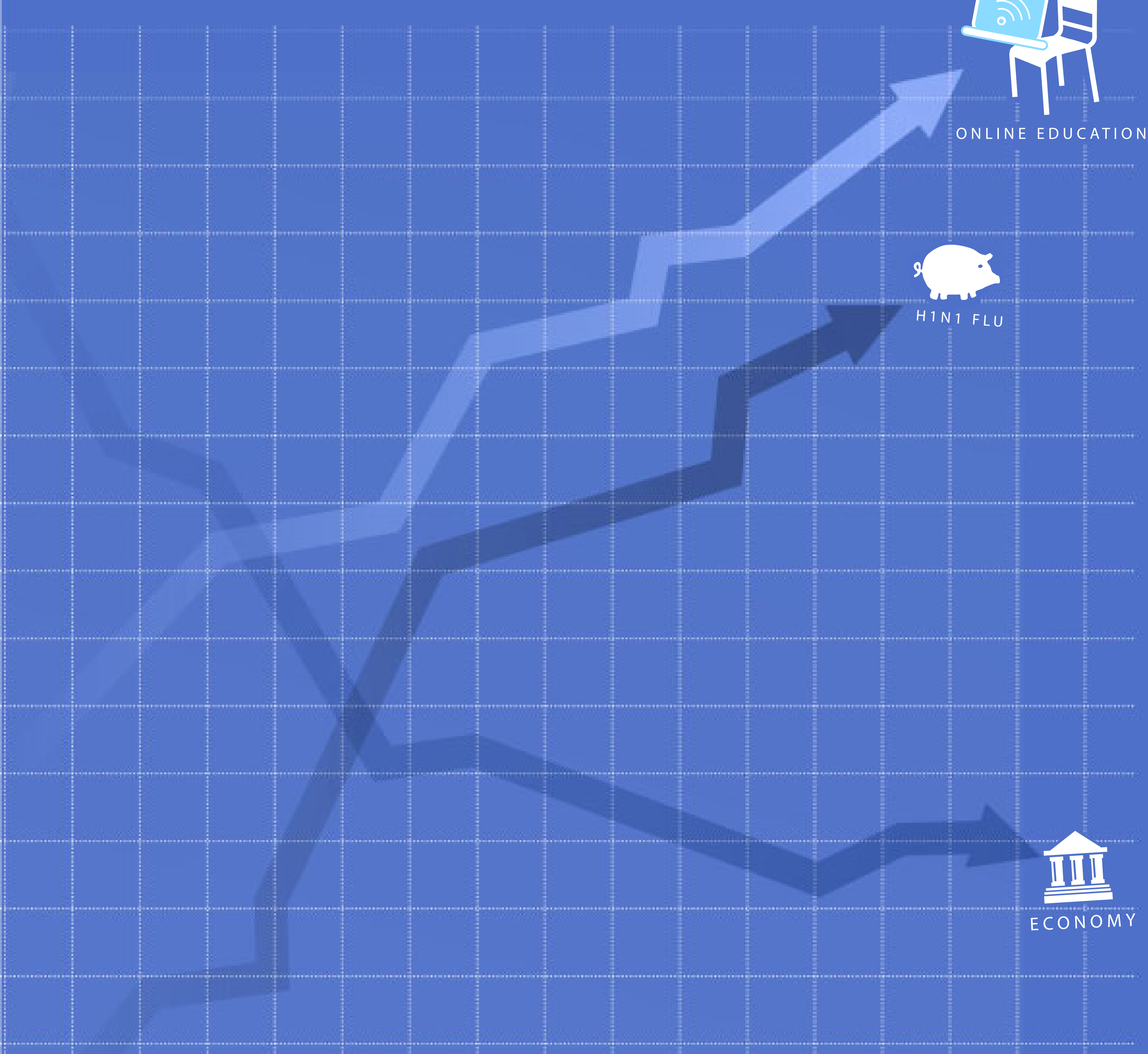
Learning on Demand

Online Education in the United States, 2009

I. Elaine Allen and Jeff Seaman



BABSON Survey Research Group

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Learning on Demand

Online Education in the United States, 2009

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Executive Summary

Learning on Demand: Online Education in the United States, 2009 represents the seventh annual report on the state of online learning in U.S. higher education. This year's study, like those for the previous six 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 more than 2,500 colleges and universities, the study addresses the following key questions:

How Many Students are Learning Online?

Background: For the past six years online enrollments have been growing substantially faster than overall higher education enrollments. The expectation of academic leaders has been that online enrollments would continue their substantial growth for at least another year. Do the measured enrollments match these lofty expectations?

The evidence: Online enrollments have continued to grow at rates far in excess of the total higher education student population, with the most recent data demonstrating no signs of slowing.

- Over 4.6 million students were taking at least one online course during the fall 2008 term; a 17 percent increase over the number reported the previous year.
- The 17 percent growth rate for online enrollments far exceeds the 1.2 percent growth of the overall higher education student population.
- More than one in four higher education students now take at least one course online.

What is the Impact of the Economy on Online Education?

Background: Bad economic times have historically been good for higher education enrollments, either because the decreased availability of good jobs encourages more people to seek education, or because those currently employed seek to improve their chances for advancement by advancing their education.

The evidence: Academic leaders at all types of institutions report increased demand for face-to-face and online courses, with those at public institutions seeing the largest impact. In all cases the demand for online offerings is greater than that for the corresponding face-to-face offerings.

- Over one-half (54 percent) of institutions report that the economic downturn has increased demand for existing face-to-face courses.
- The economic impact has been greatest on demand for online courses, with 66 percent of institutions reporting increased demand for *new* courses and programs and 73 percent seeing increased demand for *existing* online courses and programs.
- The economic impact on institutional budgets has been mixed; 50 percent have seen their budgets decrease as a result, but 25 percent have experienced an increase.

What Contingency Plans do Institutions Have for H1N1?

Background: A series of questions about the effect of the H1N1 on institutions and the extent and type of contingency plan were asked of chief academic officers. Of particular interest is the use of online as part of the contingency plan.

The evidence: Proponents of online learning have long posited that moving face-to-face classes online could become an important component of academic continuity planning. A potential H1N1 pandemic is such an event that might trigger such planning.

- Over two-thirds of institutions report that they have a formal contingency plan in place to deal with a possible disruption from the H1N1 flu.
- Substituting online for face-to-face classes is a component of 67 percent of H1N1 contingency plans.
- Twenty percent of institutions with no current online offerings include introducing online classes as part of their contingency plans.

Is Online Learning Strategic?

Background: Last year's report showed a very small decline in the number of chief academic officers declaring online education as critical to their continued growth. Is there a continued decline in 2009?

The evidence: This year's results show a very small increase from the previous year and begin to signal that a plateau may have been reached by institutions believing that online is critical to their long-term strategy.

- The proportion of institutions that see online education as a critical component of their long-term strategy appears to have reached a plateau over the past several years.
- Baccalaureate institutions continue to be the least likely to consider online to be strategic, with only 33 percent agreeing.
- Public institutions (74 percent) are more likely to believe that online is critical for their long-term strategy than either private for-profit (51 percent) or private nonprofit (50 percent) institutions.

Has Faculty Acceptance of Online Increased?

Background: The perception of chief academic officers of faculty acceptance of online teaching and learning has changed little in the last six 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 2002.

- 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 six years.
- The proportion of chief academic officers that report their faculty accept online education varies widely by type of school but reaches a majority in none.

Do Faculty Receive Training 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 19 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 (65 percent) and informal mentoring (59 percent).

What is Online Learning?

The focus of this report is online education. To maintain consistency with previous work, we have applied the same definitions used in our six prior annual 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, the primary focus of this report, 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 is defined as having between 30 percent 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 online learning 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 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

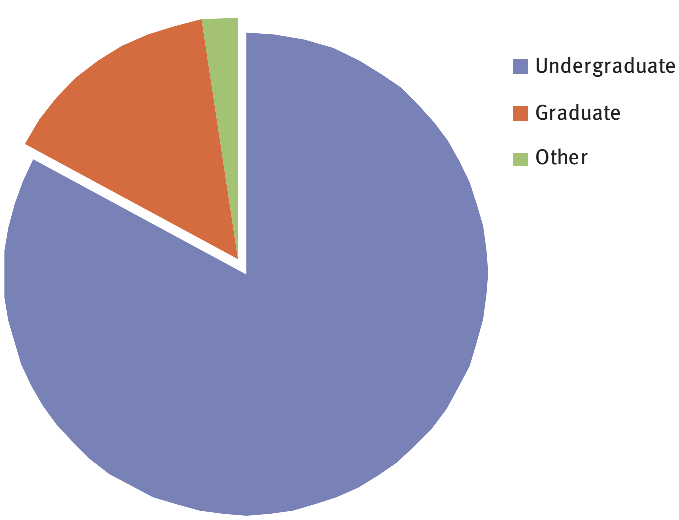
How Many Students are Learning Online?

For the sixth consecutive year the number of students taking at least one online course continued to expand at a rate far in excess of the growth of overall higher education enrollments. The most recent estimate, for fall 2008, shows an increase of 17 percent over fall 2007 to a total of 4.6 million online students. The growth from 1.6 million students taking at least one online course in fall 2002 to the 4.6 million for fall 2008 represents a compound annual growth rate of 19 percent. The overall higher education student body has only grown at an annual rate of around 1.5 percent during this same period (from 16.6 million in fall 2002 to 18.2 million for fall 2008 - *Projections of Education Statistics to 2018, National Center for Education Statistics*). Over one-quarter of all higher education students are now taking at least one online course. A question posed each year is "when will the growth in online reach its limit?" The current data show that this limit has not yet been reached, as double-digit growth rates continue for yet another year.

Total and Online Enrollment in Degree-granting Postsecondary Institutions – Fall 2002 through Fall 2008

	Total Enrollment	Annual Growth Rate Total Enrollment	Students Taking at Least One Online Course	Annual Growth Rate Online Enrollment	Online Enrollment as a Percent of Total Enrollment
Fall 2002	16,611,710	NA	1,602,970	NA	9.6%
Fall 2003	16,911,481	1.8%	1,971,397	23.0%	11.7%
Fall 2004	17,272,043	2.1%	2,329,783	18.2%	13.5%
Fall 2005	17,487,481	1.2%	3,180,050	36.5%	18.2%
Fall 2006	17,758,872	1.6%	3,488,381	9.7%	19.6%
Fall 2007	17,975,830	1.2%	3,938,111	12.9%	21.9%
Fall 2008	18,199,920	1.2%	4,606,353	16.9%	25.3%

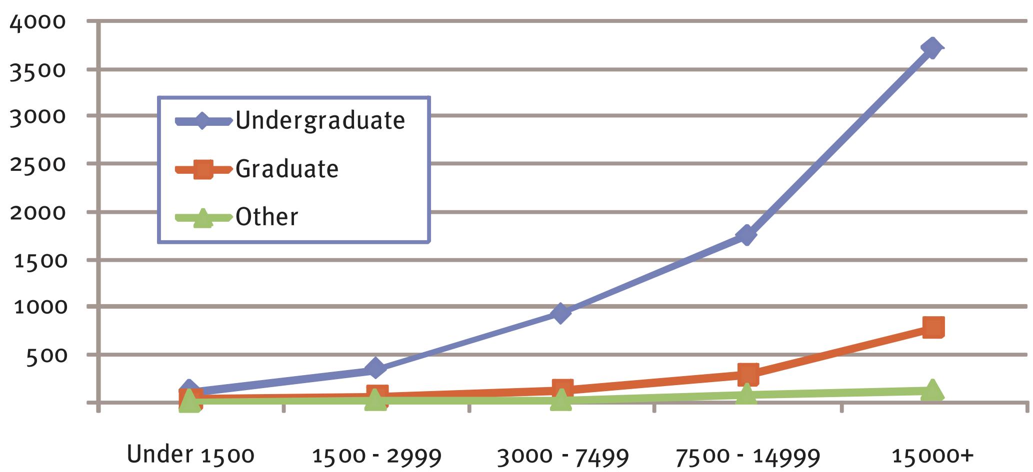
Level of Study of Online Students - Fall 2008



Who are these 4.6 million students? The overwhelmingly majority (over 82 percent) are studying at the undergraduate level with only 14 percent taking graduate level courses and the remainder in some other for-credit course. Using survey results and figures from the most recent federal data (*Digest of Education Statistics: 2008 National Center for Education Statistics*) to compare enrollment patterns shows that the distribution of online students by education type mirrors that of the entire higher education student body. For example, the proportion of undergraduates in online education (83 percent) is only slightly below that of the total population of higher education students (86 percent).

As noted in previous reports in this series, virtually all institutions that desire to offer online courses and programs are already doing so. Those few that may still launch their first online courses and/or programs are typically small and will have little impact on overall online enrollments. The majority of the recent growth in online enrollments has come from the schools that are larger and more established, and in a better position to 'scale up' their online offerings.

MEAN ONLINE ENROLLMENT BY SIZE OF INSITUTION - FALL 2008

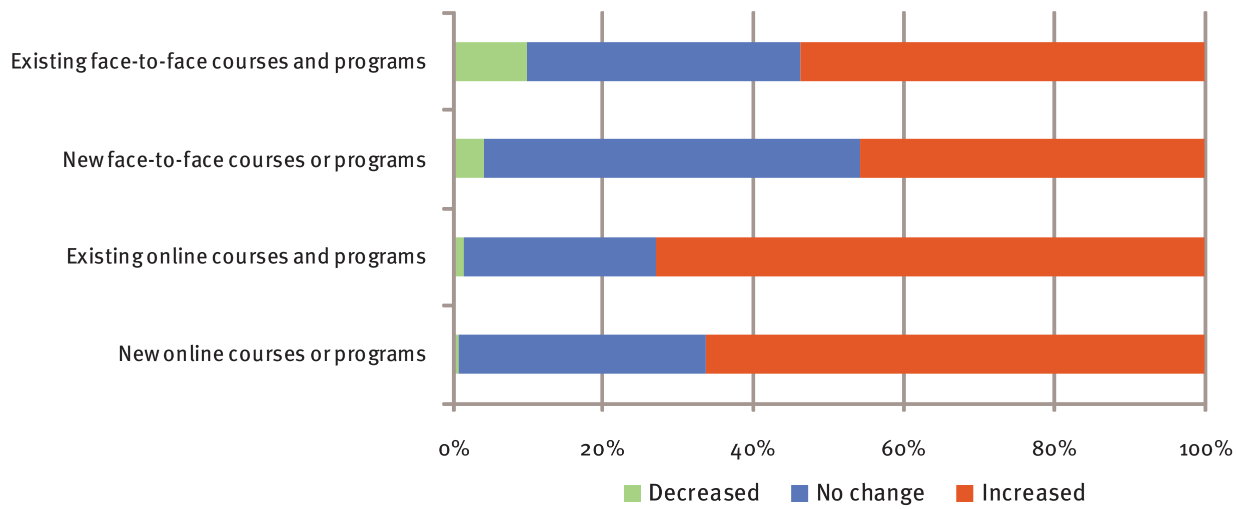


This year's results, like those of previous years, shows that it is the largest institutions that teach, on average, considerably more online students than institutions of any other size. The average number of online students per institution shows the expected very strong positive correlation to the size of the institution. While the pattern is true for both undergraduate and graduate-level online enrollments, the relationship is strongest among the undergraduate population. The pattern of greater online enrollments at the largest institutions results in a very strong concentration of online students at a relatively few institutions. For example, 89 percent of all online students are studying at institutions with 1,000 or more online enrollments, even though these institutions comprise only 38 percent of those with online offerings. The very largest institutions have the lion's share of online enrollments - one-half (50 percent) of all online students are studying at institutions with 5,000 or more online enrollments, representing only 6 percent of all institutions with online enrollments.

What is the Impact of the Economy on Online Education?

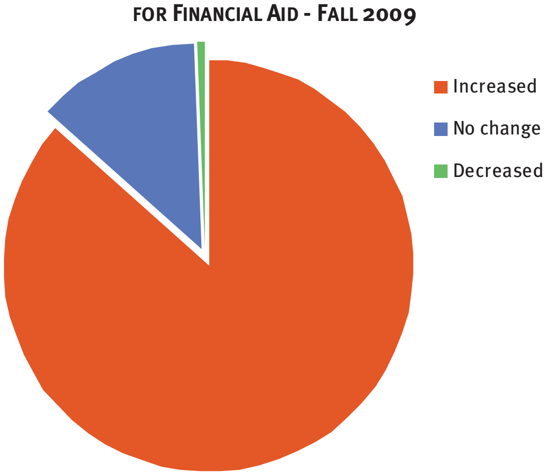
A large proportion of chief academic officers report that the economic downturn created an increase in the demand for both face-to-face and online course and program offerings at their institution. The number seeing an increase in demand for *existing* offerings is slightly higher than those seeing an increase in demand for *new* offerings, with far more respondents reporting increased demand for online offerings than for face-to-face courses and programs.

Impact of the Economic Downturn on the Demand for Courses and Programs - Fall 2009



Academic leaders at all types of institutions report increased demand for face-to-face and online courses, with those at public institutions seeing the greatest impact. The overall numbers do mask some large differences in experiences by type of institution. In all cases the proportion reporting an increase in demand for *online* offerings is larger than for the corresponding *face-to-face* offerings. Over three-quarters (76 percent) of public institutions report increased demand for existing face-to-face courses and programs, compared to only 32 percent of private nonprofit institutions. Likewise, nearly all public institutions (87 percent) say the economic downturn has increased demand for their existing online courses and programs. A smaller proportion, but still a majority (58 percent), of nonprofits see the economic downturn increasing demand for their existing online courses and programs.

Impact of Economic Downturn on Applications for Financial Aid - Fall 2009



Many institutions are finding themselves in a difficult position – facing increased demand for their face-to-face and online offerings, but having negative financial factors weighing on them as well. Virtually all institutions report an increase in demand for financial aid, and about one-half say that the size of the institutional budget has decreased as a result of the economic downturn.

The impact of the economic downturn on budgets is very uneven. A majority of the private for-profit institutions report an increase in their budget as a result of the economic downturn, while a large majority of the public institutions say they are experiencing a decrease in the size of their budget

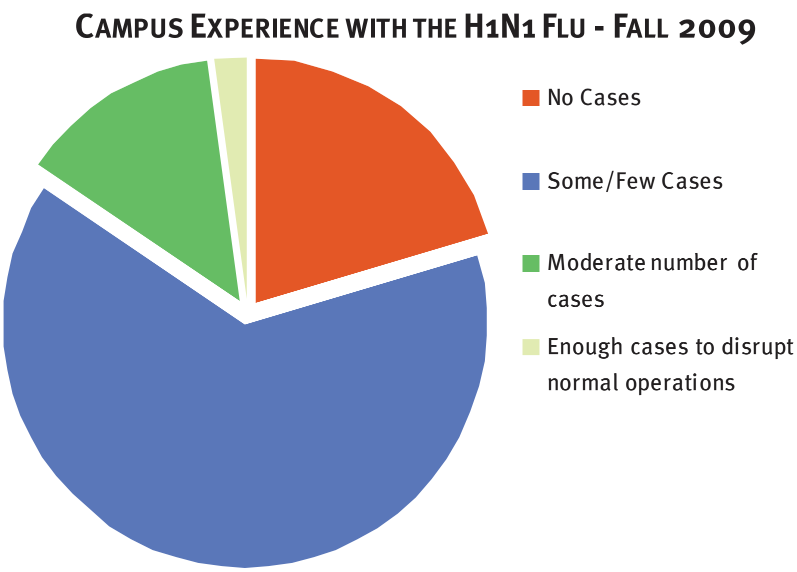
It is the public institutions that are being caught in the biggest squeeze; large numbers report increased demand for all of their offerings (both face-to-face and online), they are experiencing increased applications for financial aid, and they need to manage all this with smaller budgets.

Increased Demand from Economic Downturn by Institutional Control - Fall 2009

The results for institutions that do not have any current online offerings are particularly interesting for those studying online education. Fully 45 percent of these institutions report increased demand for new online courses and programs. While this proportion is smaller than for institutions with online courses only (66 percent) or those with fully online programs (73 percent), it does represent nearly 300 institutions with no current online offerings that are reporting increased student demand to begin such offerings. Will this acknowledged increase in student demand for online courses and programs translate into a sizable increase in the number of institutions with online offerings? What, if any, effect will this have on the future growth of online enrollments? Given that previous reports in this series have demonstrated that those institutions without online offerings tend to be among the very smallest in terms of overall enrollments, we can safely assume that even if large numbers of these institutions begin new online offerings the overall impact on online enrollments will remain small.

Increased Demand for New Online Offerings by Current Online Offerings - Fall 2009

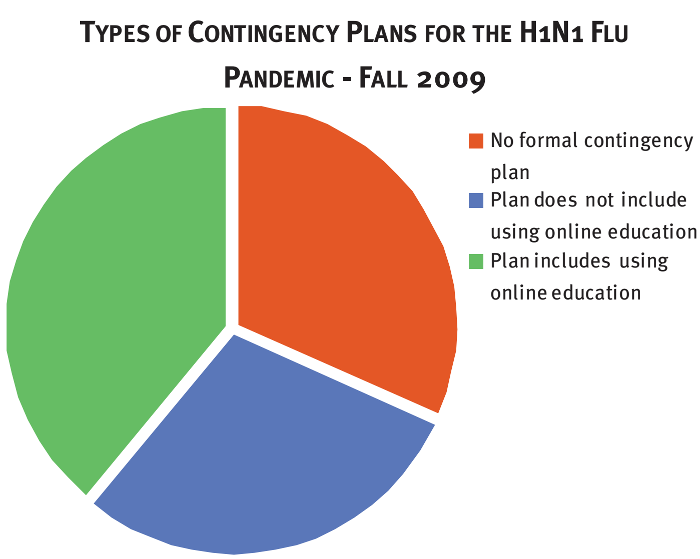
What Contingency Plans do Institutions Have for H1N1?



While a third wave of the H1N1 pandemic may still occur early in the spring of 2010, eighty percent of all schools have already reported H1N1 cases during fall 2009. Most (64 percent) have seen only a few cases, with only 2 percent of institutions reporting that the number of cases has been sufficient to disrupt normal operations. The impact of H1N1 cases varies considerably by the size of the institution. The smallest institutions (fewer than 1500 total enrollments) have the largest proportion reporting no cases (29 percent), compared to only 10 percent of the largest institutions (those over 15,000 total enrollments).

What contingency plans, if any, have institutions put in place to deal with this potential disruption to their operations, and what role, if any, do online courses play in these plans? Over two-thirds (68 percent) of all institutions report that they have a formal contingency plan in place to deal with a possible H1N1 flu pandemic. The remaining do not have any plan, are still developing their plan, or have decided on some form of informal approach. Among the institutions with formal contingency plans, 67 percent report that their plans include substitution of online classes for face-to-face classes if the need arises. Public institutions are the most likely to have included substituting online for face-to-face classes as part of their H1N1 contingency plan. Fully 72 percent of all public institutions with contingency plans report that online course substitution is a component of the plan.

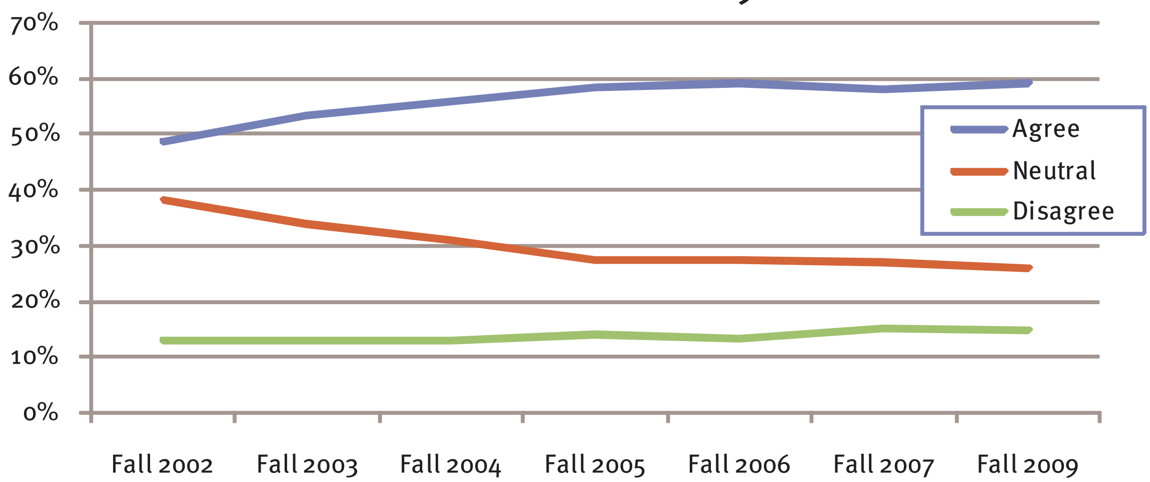
It is interesting to note that among schools with no online courses or programs 20 percent have a contingency plan that includes shifting face-to-face courses online in event of an outbreak serious enough to disrupt normal operations. With no prior experience for supporting online instruction at their institution, it is not clear what expertise these institutions will call on if they need to put their plan into practice. However, similar to the results observed on the impact of the economic downturn, this is another example of current events leading to a potential growth in the number of institutions offering online courses in some capacity.



Is Online Learning Strategic?

Previous reports in this series have noted that the proportion of chief academic officers who agree that online education is a critical part of their long-term strategy appears to have reached a plateau. The results of this year's survey confirm that conjecture. Since the 2005 survey the percent of institutions agreeing with this statement has varied less than one percent. All of the early gains in the number of institutions agreeing were the result of those who had previously been 'neutral' changing into the 'agree' category. The proportion of institutions who do not believe that online is critical to their long-term strategy has remaining constant at just over ten percent for the entire survey period.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION: FALL 2002 - FALL 2009



Similar to the results observed in previous years, it is the public institutions (74 percent) and the largest institutions (81 percent) that have the largest proportion agreeing that online education is a part of their long-term strategy.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION – FALL 2009

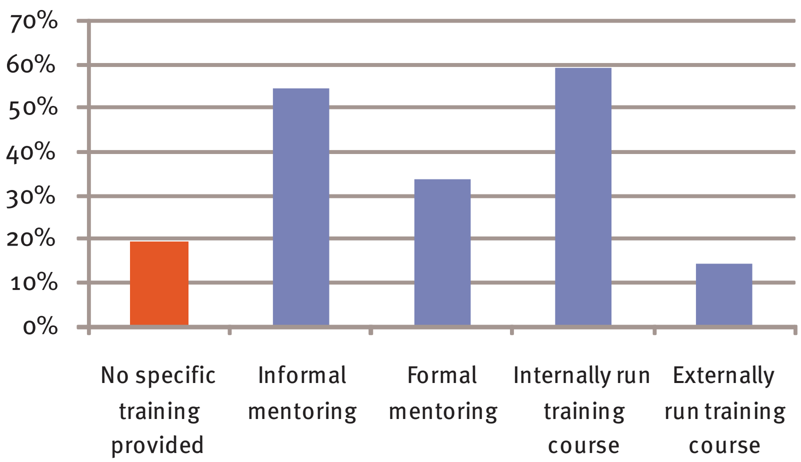
	Public	Private nonprofit	Private for-profit		
Percent Agreeing	73.6%	49.5%	50.7%		
	Doctoral/ Research	Master's	Baccalaureate	Associate's	Specialized
Percent Agreeing	69.7%	64.5%	32.7%	65.7%	61.2%
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Percent Agreeing	48.0%	63.5%	70.5%	71.5%	80.8%

Baccalaureate institutions have consistently reported the most negative opinions towards online learning; a pattern repeated in the current results. Less than one third (32.7 percent) of these institutions see online education as critical to their long-term strategy. There is little difference in the proportion of institutions by size agreeing that online education is strategic, with the single exception of the very smallest (fewer than 1500 total enrollments). This pattern also mirrors the results observed for previous years.

Do Faculty Receive Training for Teaching Online?

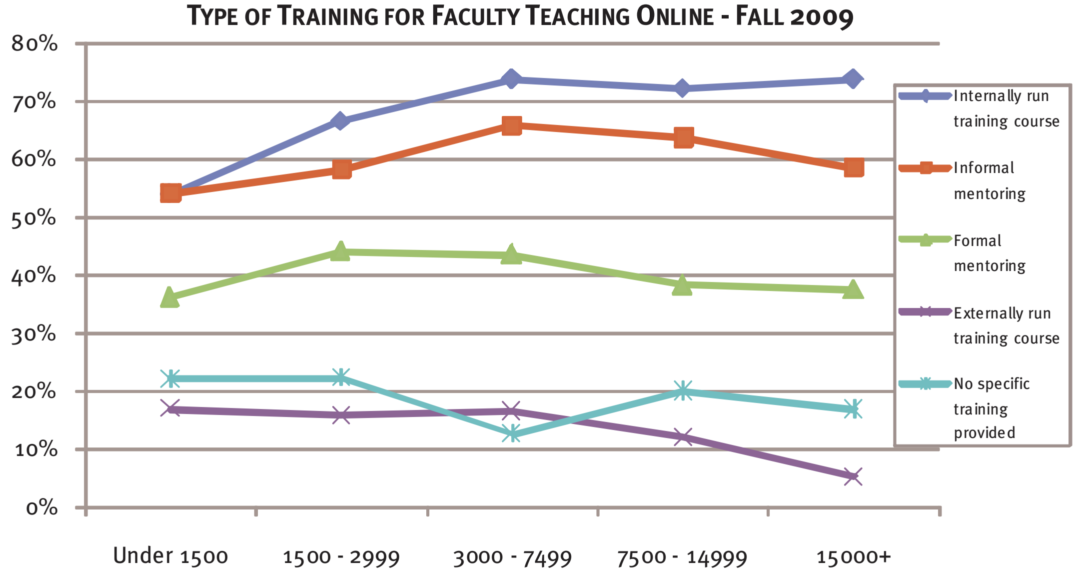
For the first time, the survey asked chief academic officers about the training provided to faculty when teaching online. Nearly one-fifth (19 percent) of all institutions do not provide any training (even informal mentoring) for their faculty teaching online courses. Among those institutions that do have some form of training, most provide more than one approach. Informal mentoring (59 percent of all institutions with online offerings) and internally run training courses (65 percent) are the most common approaches. Formal mentoring programs (40 percent) are not as common as informal programs. Only a small minority (15 percent) provide training via an externally run course. Such programs are most popular at associate's institutions (20 percent) and least popular at Doctoral/Research institutions, with only 4 percent using external courses.

Type of Training for Faculty Teaching Online - Fall 2009



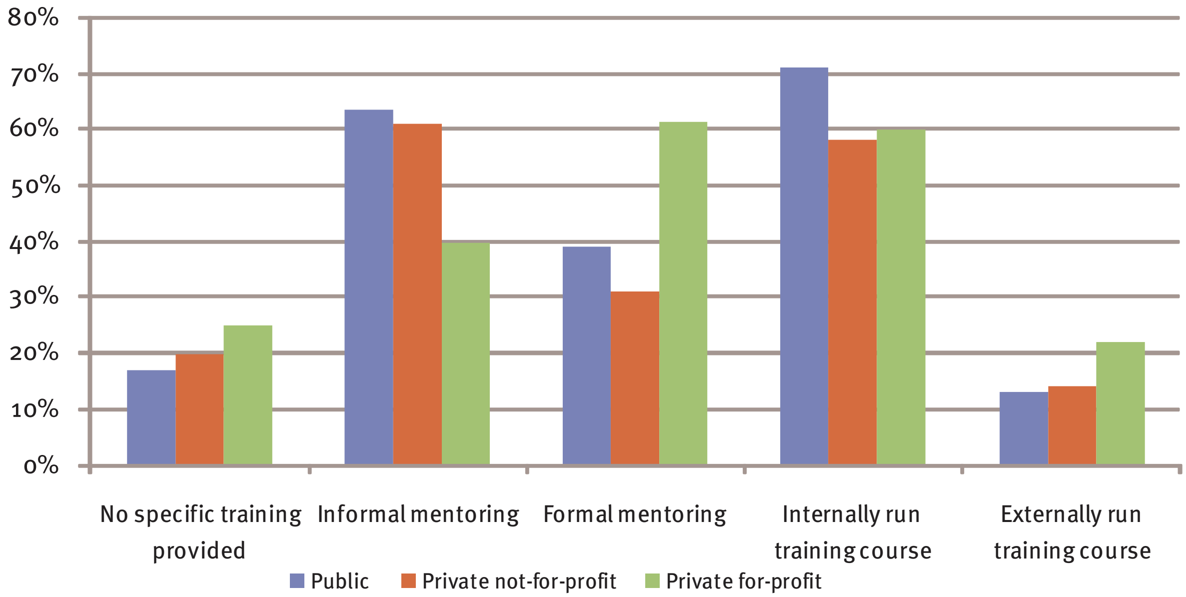
Size of the institution and institutional control both show contrasts in types of training offered. Large institutions are more likely to have internally run training courses and the very smallest (under 1500 total enrollments) the least likely, possibly because their small size reflects a shortage of the specific resources needed to support these training programs. Conversely the very largest institutions (over 15,000 total enrollments) would typically have the richest array of resources to call on to provide training, and thereof are the most likely to run internal training programs and least likely (5 percent) to employ externally-run training programs for their online teaching faculty.

Type of Training for Faculty Teaching Online - Fall 2009



Private for-profit institutions are the most likely to offer no training (25 percent) but the most likely to provide some type of formal mentoring (61 percent).

TYPE OF TRAINING FOR FACULTY TEACHING ONLINE - FALL 2009



Has Faculty Acceptance of Online Increased?

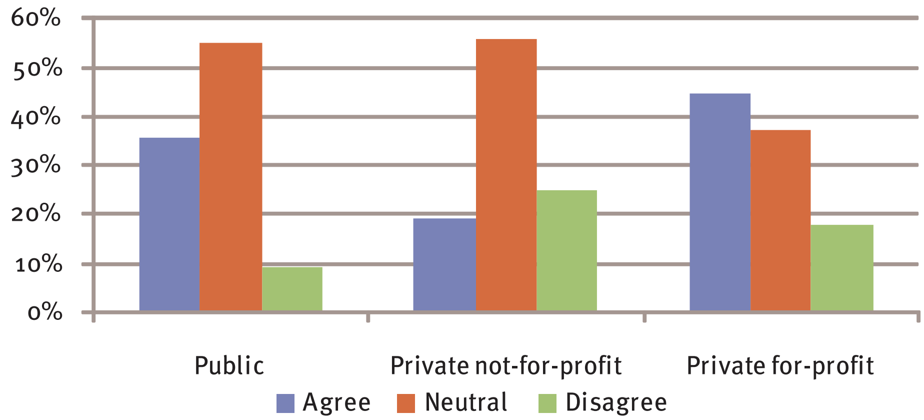
Chief academic officers report a slight decrease in the faculty acceptance of online instruction, a surprise given the increase in student demand for courses and programs. Between 2002, when this question was first asked, and 2007 the proportion of institutions reporting that their faculty accept the value and legitimacy of online education increased almost 6 percentage points. This has been followed, however, by an almost 3 percentage point drop for this year.

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – FALL 2002 TO FALL 2009

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

Does this recent drop indicate that the upward pressure to offer more online courses and programs that these institutions are experiencing is leading to increased 'push back' among their faculty? Future studies will need to track these results, paying particular attention to any possible relationship of perceived faculty acceptance to the rate of growth of online offerings at the institution. It is academic leaders at the private for-profit institutions that have the most favorable perception of their faculty's acceptance, while those at the private nonprofits have the lowest rate.

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION - FALL 2009



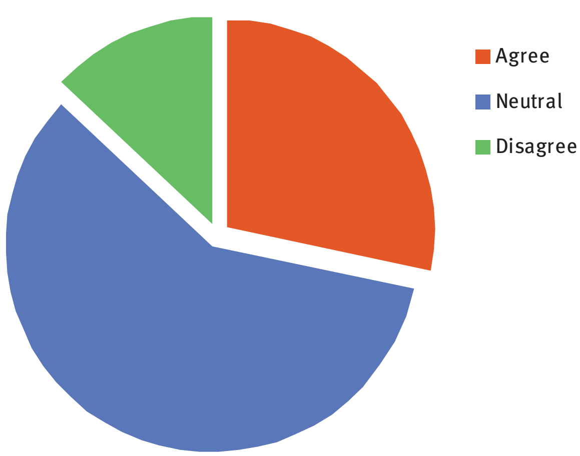
The perceived acceptance rate among faculty varies widely by Carnegie Class with only 11 percent of Baccalaureate institutions reporting that their faculty accept the value and legitimacy of online, while four times that many (44 percent) of the Associates institutions report that their faculty accept the value and legitimacy of online education. As has been the case for every prior year of this survey, the proportion of academic leaders who say that their faculty accept the value and legitimacy of online education does not reach a majority among any class of institution.

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION - FALL 2009

	Doctoral/ Research	Master's	Baccalaureate	Associate's	Specialized
Agree	20.0%	20.2%	11.1%	44.4%	26.7%
Neutral	57.9%	66.2%	55.6%	43.9%	55.9%
Disagree	22.0%	13.7%	33.3%	11.7%	17.4%

Is Retention of Students Harder in Online Courses?

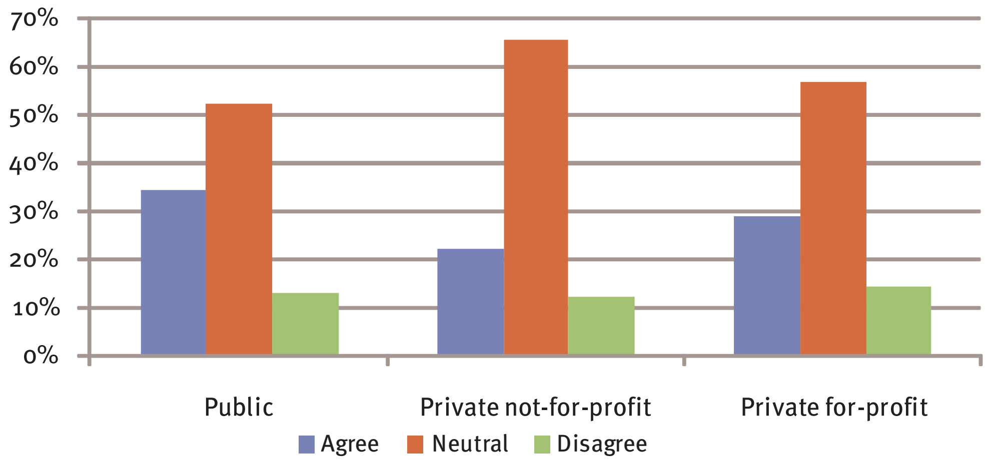
RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES - FALL 2009



A continuing question among those studying online education has been the issue of student retention. Online courses typically attract students who might otherwise have not been able to attend traditional on-campus instruction, either because of work, family, or other obligations. This difference in the nature of the student body has made the direct comparison of retention rates between online and face-to-face very difficult – if students are more likely to drop out of an online course because of work or family commitments, does that reflect the nature of the course or the nature of the student? This study asked chief academic officers if "retaining students is a greater problem for online courses than it is for face-to-face courses." The academic leaders were not asked to speculate on *why* they might be a difference, only if they believed that such a difference exists.

Overall, the majority (59 percent) of chief academic officers are 'Neutral' when asked if retaining students is a greater problem for online courses than it is for face-to-face courses, but the percent that 'Agree' with this statement are more than twice as large as those that 'Disagree' (28 percent vs. 13 percent).

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES - FALL 2009



This is one of the rare areas where those with experience with online education have a more pessimistic view than those without such experience. Only 19 percent of institutions that do not have online offerings think that it would be harder to retain students in online courses than in face-to-face courses. Among those institutions with online offerings, however, this number jumps to 31 percent. An institution's online education experience does lead to a stronger conviction that it is harder to retain student in online courses. It should be noted, however, that a majority institutions, both with and without online offerings, remain neutral on this topic.

It is the institutions with the longest experience with online and the most extensive online offerings, public institutions, that are strongest in agreement that retaining students is a greater problem for online than it is for face-to-face courses. This may represent the different nature of the public institution's student mix, drawing a larger proportion of older, working students that might be more likely to suffer the *'life happens'* events that would force them to withdraw.

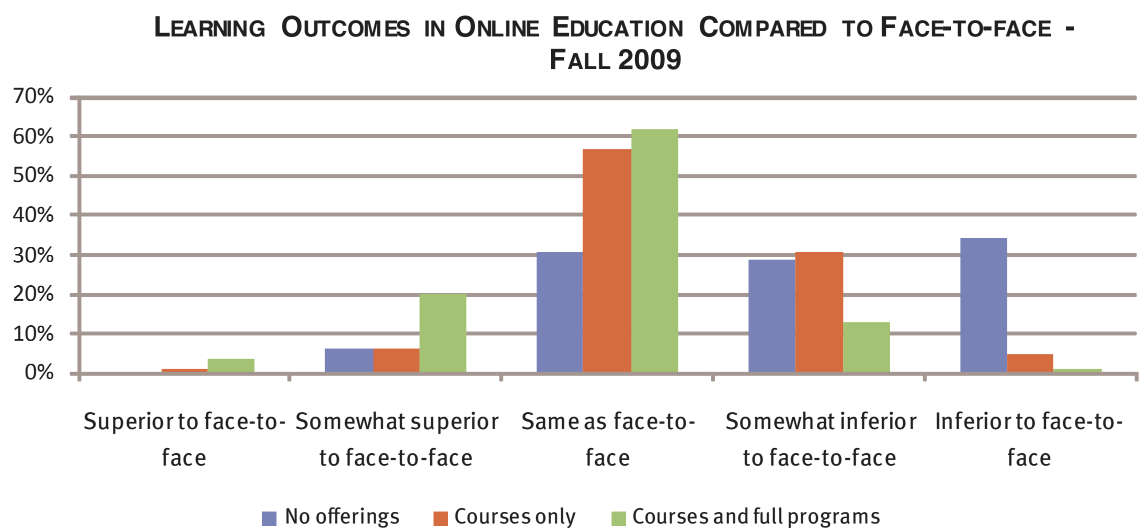
Are Learning Outcomes in Online Comparable to Face-to-Face?

Since first measured in 2003, the proportion of chief academic officers reporting that the learning outcomes for online compared to face-to-face as the 'Same', 'Somewhat Superior', and 'Superior' has increased from 57 percent to 68 percent. This contrasts with the result noted previously in this report that the perceived acceptance of online by faculty has not increased over this same time span. Even after this improved view of online learning outcomes, there remain more who rate the outcomes in one of the "inferior" categories than do one of the "superior" classifications.

Learning Outcomes in Online Education Compared to Face-to-face: 2003 - 2009

	2003	2004	2006	2009
Superior	0.6%	1.0%	1.8%	2.1%
Somewhat superior	11.7%	10.0%	15.1%	12.4%
Same	44.9%	50.6%	45.0%	53.0%
Somewhat inferior	32.1%	28.4%	30.3%	23.0%
Inferior	10.7%	10.1%	7.8%	9.5%

A starkly different picture emerges when examining this question by whether or not an institution offers any online courses or programs. A majority of institutions with no online offerings (58 percent) believe online to be 'Somewhat inferior to face-to-face' or 'Inferior to face-to-face.' This contrasts with only 14 percent of the institutions offering fully online programs that classified online learning outcomes as 'Inferior.'



Survey Methodology

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

The data for this report is collected by both the Babson Survey Research Group and by the College Board. The College Board includes questions for this study of online learning 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 4,494 institutions; a total of 2,590 responses were included in the analysis, representing a 57.7 percent overall response rate. These 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, and 2,577 in 2008) 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 (http://nces.ed.gov/ipeds/). 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 (http://www.carnegiefoundation.org/classifications/). 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.

This year's report marks 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 this 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 to wait for institutions to have complete records of their data, results for enrollment and program offerings still refer to the previous fall term.

Appendix

Proportion of Institutions Reporting Economic Downturn has Increased Demand for Courses and Programs – Fall 2009

	Public	Private nonprofit	Private for-profit		
Existing Face-to-face	75.9%	31.6%	52.7%		
New Face-to-face	60.2%	30.9%	45.8%		
Existing Online	87.0%	58.2%	67.0%		
New Online	76.5%	59.5%	54.5%		
	Doctoral/ Research	Master's	Baccalaureate	Associate's	Specialized
Existing Face-to-face	51.9%	44.7%	30.9%	75.2%	26.5%
New Face-to-face	39.2%	35.9%	24.6%	63.3%	32.6%
Existing Online	75.0%	66.7%	62.1%	81.2%	62.0%
New Online	79.1%	67.6%	55.8%	71.9%	52.4%
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Existing Face-to-face	45.5%	48.8%	61.7%	73.9%	73.0%
New Face-to-face	40.6%	44.9%	50.6%	55.8%	57.4%
Existing Online	64.4%	71.8%	82.3%	81.1%	90.0%
New Online	57.8%	65.7%	73.4%	74.4%	86.3%

Proportion of Institutions Reporting Economic Downturn has Increased Demand for Financial Aid – Fall 2009

	Public	Private nonprofit	Private for-profit		
Increased Demand	93.4%	80.3%	86.2%		
	Doctoral/ Research	Master's	Baccalaureate	Associate's	Specialized
Increased Demand	92.5%	86.8%	81.7%	92.5%	71.1%
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Increased Demand	82.3%	84.2%	92.7%	95.4%	97.5%

Impact of Economic Downturn on Size of Institutional Budget – Fall 2009

	Public	Private nonprofit	Private for-profit		
Increased	12.6%	22.4%	58.8%		
No change	19.0%	32.5%	21.1%		
Decreased	68.4%	45.1%	20.1%		
	Doctoral/ Research	Master's	Baccalaureate	Associate's	Specialized
Increased	19.4%	20.4%	17.1%	33.1%	17.2%
No change	19.2%	26.5%	26.3%	22.6%	35.8%
Decreased	61.3%	53.1%	56.6%	44.3%	47.0%
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Increased	33.1%	21.8%	18.8%	9.5%	22.0%
No change	27.4%	28.1%	21.4%	24.5%	13.7%
Decreased	39.6%	50.1%	59.8%	66.1%	64.3%

Campus Experience with the H1N1 Flu - Fall 2009

	Public	Private nonprofit	Private for-profit
No Cases	13.9%	20.5%	33.1%
Some/Few Cases	67.2%	64.1%	57.6%
Moderate number of cases	17.9%	14.1%	3.7%
Enough cases to disrupt normal operations	1.1%	1.2%	5.7%

Campus Experience with the H1N1 Flu - Fall 2009

	Under 1500	1500–2999	3000–7499	7500–14999	15000+
No Cases	29.1%	14.3%	15.0%	9.0%	10.4%
Some/Few Cases	60.2%	70.1%	64.8%	73.7%	60.2%
Moderate number of cases	7.5%	15.7%	19.0%	15.3%	27.1%
Enough cases to disrupt normal operations	3.2%	.0%	1.2%	2.1%	2.3%

CONTINGENCY PLAN FOR THE H1N1 FLU PANDEMIC - FALL 2009

	Public	Private nonprofit	Private for-profit		
No Formal Plan	28.9%	29.6%	41.1%		
Plan does not Include Online	20.2%	36.7%	32.0%		
Plan Includes Online	50.9%	33.7%	26.9%		
	Doctoral/ Research	**Master's**	**Baccalaureate**	**Associate's**	**Specialized**
No Formal Plan	20.9%	25.9%	20.9%	31.2%	42.9%
Plan does not Include Online	18.8%	28.7%	40.4%	26.3%	30.3%
Plan Includes Online	60.3%	45.3%	38.7%	42.5%	26.8%
	Under 1500	**1500–2999**	**3000–7499**	**7500–14999**	**15000+**
No Formal Plan	35.6%	27.2%	25.7%	34.7%	31.2%
Plan does not Include Online	35.7%	27.2%	21.0%	20.8%	22.6%
Plan Includes Online	28.8%	45.6%	53.3%	44.5%	46.2%
	No Online Offerings	**Online Courses Only**	**Online Courses and Full Programs**		
No Formal Plan	29.4%	34.8%	31.6%		
Plan does not Include Online	50.8%	28.5%	16.9%		
Plan Includes Online	19.8%	36.7%	51.5%		

TYPE OF TRAINING FOR FACULTY TEACHING ONLINE - FALL 2009

No specific training provided	19.1%
Informal mentoring	59.1%
Formal mentoring	39.5%
Internally run training course	64.8%
Externally run training course	14.8%

Type of Training for Faculty Teaching Online - Fall 2009

	Public	Private nonprofit	Private for-profit		
No specific training provided	16.9%	19.9%	24.9%		
Informal mentoring	63.4%	60.9%	39.6%		
Formal mentoring	39.1%	31.2%	61.3%		
Internally run training course	71.1%	58.0%	59.9%		
Externally run training course	13.2%	14.3%	22.0%		
	Doctoral/ Research	**Master's**	**Baccalaureate**	**Associate's**	**Specialized**
No specific training provided	15.1%	15.9%	25.4%	19.4%	23.1%
Informal mentoring	68.8%	57.7%	60.1%	58.9%	58.0%
Formal mentoring	32.8%	37.2%	31.3%	47.6%	27.4%
Internally run training course	69.9%	66.1%	57.4%	69.4%	53.3%
Externally run training course	4.0%	11.9%	14.7%	19.7%	11.4%
	Under 1500	**1500–2999**	**3000–7499**	**7500–14999**	**15000+**
No specific training provided	22.1%	22.4%	12.6%	20.0%	16.9%
Informal mentoring	54.2%	58.3%	65.9%	63.9%	58.6%
Formal mentoring	36.3%	44.2%	43.6%	38.4%	37.6%
Internally run training course	53.9%	66.6%	74.0%	72.3%	74.0%
Externally run training course	17.1%	15.9%	16.6%	12.1%	5.2%

Faculty at My School Accept the Value and Legitimacy of Online Education – Fall 2009

	Public	Private nonprofit	Private for-profit		
Percent Agreeing	35.7%	19.2%	44.9%		
	Doctoral/ Research	**Master's**	**Baccalaureate**	**Associate's**	**Specialized**
Percent Agreeing	20.0%	20.2%	11.1%	44.4%	26.7%
	Under 1500	**1500–2999**	**3000–7499**	**7500–14999**	**15000+**
Percent Agreeing	29.3%	29.4%	35.3%	29.8%	37.1%

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES THAN IT IS FOR FACE-TO-FACE COURSES - FALL 2009

	Public	Private nonprofit	Private for-profit		
Percent Agreeing	34.4%	22.1%	28.8%		
	Doctoral/ Research	Master's	Baccalaureate	Associate's	Specialized
Percent Agreeing	20.5%	21.3%	19.0%	36.7%	23.4%
	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Percent Agreeing	24.0%	34.2%	32.7%	33.7%	26.6%

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE - FALL 2009

	Public	Private nonprofit	Private for-profit		
Superior to face	1.7%	2.6%	2.0%		
Somewhat superior to face	12.2%	13.3%	10.8%		
Same as face	65.1%	40.8%	53.3%		
Somewhat inferior to face	18.4%	28.2%	21.9%		
Inferior to face	2.6%	15.1%	11.9%		
	Doctoral/ Research	Master's	Baccalaureate	Associate's	Specialized
Superior to face	2.5%	3.0%	.9%	2.4%	2.0%
Somewhat superior to face	19.0%	15.6%	9.3%	10.4%	13.7%
Same as face	52.9%	55.8%	37.9%	62.4%	47.8%
Somewhat inferior to face	20.1%	20.9%	29.9%	20.2%	28.2%
Inferior to face	5.5%	4.6%	21.9%	4.6%	8.3%

Learning Outcomes in Online Education Compared to Face-to-face - Fall 2009

	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Superior to face	2.0%	1.5%	3.2%	2.7%	1.5%
Somewhat superior to face	12.0%	8.1%	12.4%	16.1%	20.3%
Same as face	45.1%	56.9%	62.8%	58.9%	61.3%
Somewhat inferior to face	25.8%	24.1%	18.9%	20.0%	15.3%
Inferior to face	15.1%	9.5%	2.7%	2.2%	1.6%

	No Online Offerings	Online Courses Only	Online Courses and Full Programs
Superior to face	.0%	1.1%	4.0%
Somewhat superior to face	6.3%	6.2%	20.2%
Same as face	30.8%	56.7%	61.8%
Somewhat inferior to face	28.7%	31.0%	12.9%
Inferior to face	34.2%	5.0%	1.1%

Partner Organizations

Alfred P. Sloan Foundation

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. www.sloan.org

The College Board

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. www.collegeboard.com

Association of Public and Land-grant Universities

The Association of Public and Land-grant Universities (A·P·L·U) is a voluntary, non-profit association of public research universities, land-grant institutions, and many state university systems and has member campuses in all 50 states and the U.S. territories. www.aplu.org

Southern Regional Education Board

SREB, a nonprofit and nonpartisan organization based in Atlanta, Georgia, advises state education leaders on ways to improve education. SREB was created to help leaders in education and government work cooperatively to advance education and improve the social and economic life of the region. www.sreb.org

Midwestern Higher Education Compact

Established in 1991 as an interstate compact agency, the Midwestern Higher Education Compact (MHEC) is charged with promoting interstate cooperation and resource sharing in higher education accomplishing this through three core functions: cost savings programs, student access and policy research. www.mhec.org

American Distance Education Consortium

ADEC is a nonprofit distance education consortium conceived and developed to promote the creation and provision of high quality, economical distance education programs and services to diverse audiences. www.adec.edu

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.

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Learning on Demand: Online Education in the United States, 2009 represents the seventh 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 and universities, the report addresses the following key questions:

- How Many Students are Learning Online?
- What is the Impact of the Economy on Online Education?
- What Contingency Plans do Institutions Have for H1N1?
- Is Online Learning Strategic?
- Has Faculty Acceptance of Online Increased?
- Do Faculty Receiving Training for Teaching Online?

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

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