BEST COLLEGES.COM

2018 ONLINE TRENDS IN EDUCATION REPORT

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EXECUTIVE SUMMARY

As the demand for online education increases (Allen & Seaman, 2017), schools are responding by offering new degree programs every year. The online education space has grown rapidly in recent years, and the variety of programmatic options available can be overwhelming to prospective students.

At BestColleges.com, we've designed our third annual Online Education Trends report to provide the latest look at online learner demographics, decision making, and challenges. We've also collated input from institutions about how they strive to meet the needs of online learners.

Our initiative to collect current feedback and data on trends began in 2017. This year, we surveyed 295 online program administrators and 1,500 students (including prospective students, current students, and alumni) about their experience in online education. This report is designed to help schools make the best decisions possible about the online programs they manage and the students they serve. We identify key issues in the three categories listed below.

2018's Top Trends

- Career-driven students: 73% of online students report job and employment goals as a reason for enrolling. These include students planning to transition to a new career field (35%) and those who want to earn academic credentials to bolster their standing in their current line of work (30%).
- Online students are getting younger: 34% of schools reported an increase in traditional college students (ages 18-25) including first-semester freshmen, and younger students concurrently enrolled in high school and college courses.

Online Program Marketing and Recruitment

- Prospective students need more guidance: "Finding a program that meets my needs and interests" was the third biggest challenge online students face, following "estimating actual costs" and "applying for financial aid."
- Perceptions are changing: 79% of all online students and 76% of alumni think that online education is "better than" or "equal to" on-campus education, while 57% of schools say that employers feel similarly.

Online Program Design and Development

- Demand for online learning is increasing: 99% of administrators found that demand for online education has increased or stayed the same over the past few years. Almost 40% of respondents plan to increase their online program budgets in the next year.
- Schools consider enrollment growth and hiring trends: This year, 73% of schools decided to offer online programs based on the growth potential for overall student enrollment, while 68% also considered employment demand.

INTRODUCTION

OUR GOALS: ANNUAL UPDATE

According to research from Allen and Seaman, college enrollment overall is in decline, while online enrollments are increasing with each year (2017). Most distance learners enroll at just a few schools, and the majority of these online students (68%) are at public institutions (Allen & Seaman, 2017). However, as more online programs become available through more schools, the competition for online students may increase alongside. How can any institution find a niche in the online education market that meets an existing demand, and serves the needs of those choosing online learning options today?

This 3rd annual research project shares feedback from schools and online students. As part of our report, we surveyed current students, prospective distance learners, and alumni from online programs. In our report, we cover the current demand and common motivations for online learning; development strategies for new programs; and student suggestions related to recruiting, marketing, and retention.

WHAT WE DID: METHODOLOGY

In October and November of 2017 we conducted two online surveys. The first, delivered using SurveyMonkey, was sent to school administrators representing public and private, two-year and four-year institutions that currently offer online courses, per IPEDS reporting. This year, 295 school participants shared information about their experiences with program management, the challenges they face with new programs, and their plans for future online education offerings. The second survey, delivered using the PollFish mobile survey platform, collected responses from 1,500 current, prospective, and former online students who shared feedback about their learning experiences and advice for future online students.

WHAT WE FOUND: SCHOOL AND STUDENT FEEDBACK

Through our student and school survey participants, we discovered a few trends in online education. We broke these findings into three categories:

- 2018's Top Trends
- Online Program Design and Development
- Online Program Marketing and Recruitment

2018'S TOP TRENDS

Who is learning online? Why are they choosing online learning opportunities instead of traditional on-campus options?

Our survey results corroborated several observed trends and revealed a few new developments. Students pursue online learning for a variety of reasons, but many distance learners are focused on career-related goals. Often, these students are already employed. Students are also enrolling online earlier than ever before, entering their programs as first-semester freshmen, and cross-enrolled in online college courses while still in high school.

EVOLVING STUDENT DEMOGRAPHICS

Online Learners are Career-Driven

It is no surprise that the majority of online students have career goals in mind when they enroll. Many programs are designed to attract working professionals, and career-motivated students at all stages of their professional journey. From freshman to students seeking to change careers to experienced professionals looking to bolster their credentials in their current field, career-motivated students featured prominently in our survey.

A report from The Lumina Foundation identified six categories of students, which extends beyond the age-based labels of traditional and nontraditional (Ladd, Reynolds, & Selingo, n.d.).

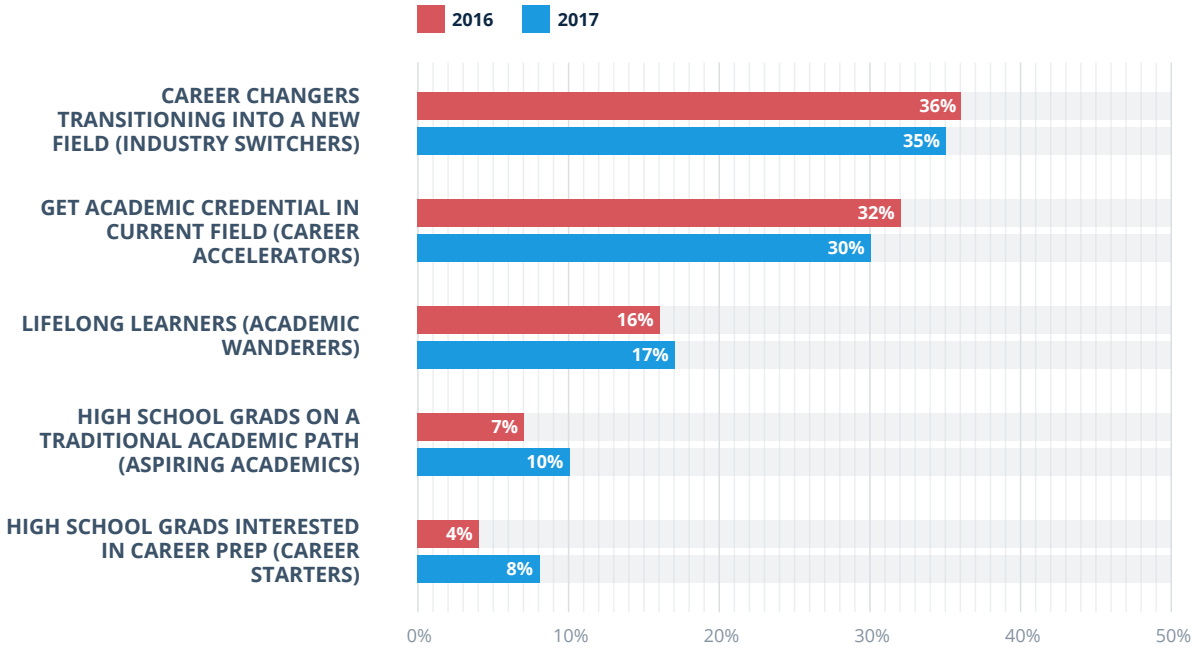
College Student Characteristics and Motivations

CATEGORY	DESCRIPTION
Aspiring Academics	18-24 year olds, focused on academic studies
Coming of Age	18-24 year olds, exploring college academics, social offerings, and a variety of activities
Academic Wanderers	Older students who perceive the advantages of a college degree, but are unsure about academic and career goals, and how to reach them
Career Starters	Wider age range, interested in college as a path to a specific career
Career Accelerators	Older students with some college and job experience, interested in college as a way to move forward in their current career field
Industry Switchers	Older students with some college and job experience, interested in transitioning to a new career field

2018'S TOP TRENDS

We used this approach to frame our survey again this year, asking students to identify their primary goals for enrolling in an online program. Seventy-three percent of respondents fell into one of the three career-related categories listed above.

Characteristics and Goals of Online Students



Online Learners are Getting Younger

We asked online program administrators to share "the most significant trend in online student demographics" at their institutions. The responses covered a range of characteristics, but many focused on changes in the age and location of their enrollees.

This year, 34% of schools reported that their online students are younger than in previous years, falling into the "traditional" college age range of 18-25, and even younger as high school students take college courses before graduating. Several schools noted that recent high school graduates are entering the workforce while also pursuing a college education.

> OUR ONLINE STUDENTS PROFILE IS NOW MORE CLOSELY MATCHING OUR ON-CAMPUS STUDENT PROFILE IN TERMS OF LOOKING LIKE THE 'TRADITIONAL' STUDENTS

2018'S TOP TRENDS

ONLINE STUDENTS SEEM TO BE GETTING YOUNGER, WITH SOME ENTERING DIRECTLY OUT OF HIGH-SCHOOL.

AVERAGE AGE OF STUDENTS IS DROPPING, YOUNGER STUDENTS WANT ONLINE COURSES DUE TO INCREASED SCHEDULE FLEXIBILITY.

The trend towards younger online students is not a new development. Recent demographic research found that that 24% of online students in 2012 were 18-24 years old, and that number increased to 44% in 2016 (The Learning House, 2016). The location trends found in our survey responses this year are much newer, however, and may signal a lasting shift. In 2016, 72% of online students chose programs offered by schools less than 100 miles away (The Learning House, 2016).

Location was another trend mentioned by 14% of our school administration respondents.

WE'RE ATTRACTING INCREASING NUMBERS OF NON-LOCAL STUDENTS FROM VARIOUS CORNERS OF THE U.S. AS WELL AS A WIDE RANGE OF INTERNATIONAL STUDENTS.

STUDENTS ARE FINDING US MORE ONLINE FROM FURTHER AWAY.

WE SEE AN UPWARD TREND IN STUDENTS FROM OUTSIDE OUR COUNTRY AND STATE ENROLLING DUE TO MILITARY SERVICE

MANY OF THE STUDENTS ARE ACTUALLY RESIDENT STUDENTS, BUT WANT A FLEXIBLE SCHEDULE FOR THE ONE ONLINE COURSE.

2018'S TOP TRENDS

BEST COLLEGES INSIGHT

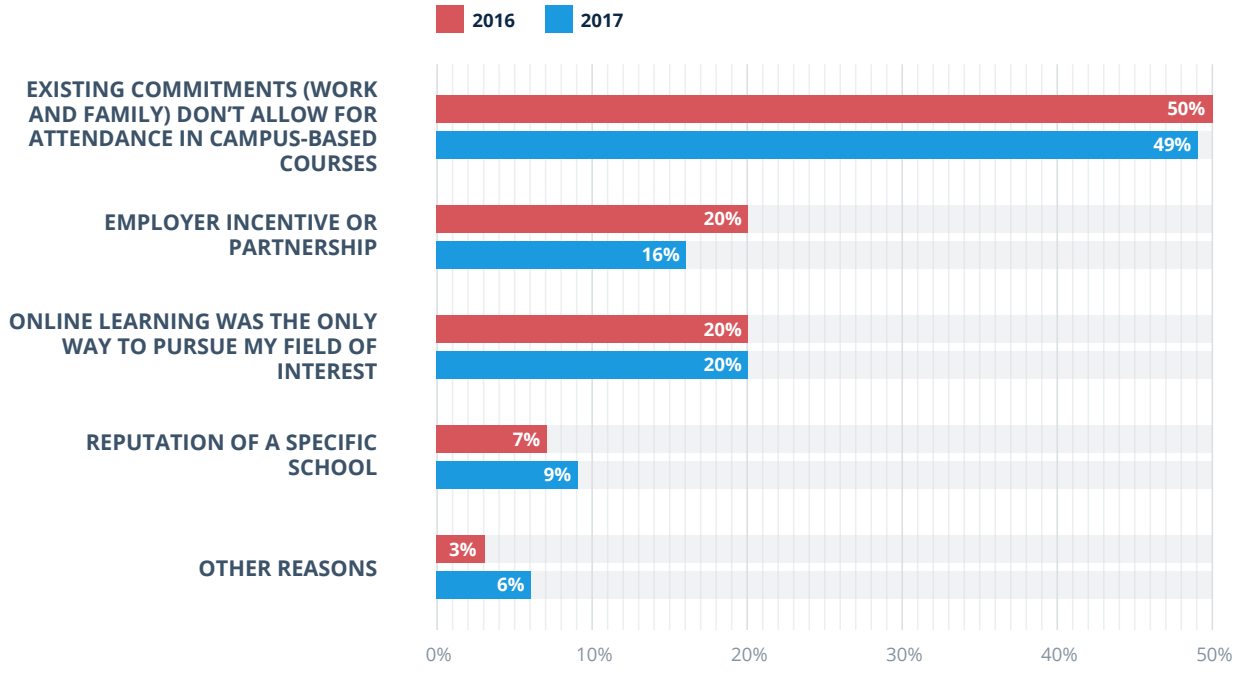
It may be time to abandon the idea of a typical online student, especially characteristics related to "distance." Many schools have observed more students enrolling from out-of-state and internationally, including military students, though some colleges have seen more local and on-campus students pursue online learning options. The uptick in students from all backgrounds demonstrates that the convenience and flexibility of the online format is attractive for geographically disparate students. Online courses and programs are increasingly attracting a wider population of learners.

Online vs. On-Campus

Our student respondents provided feedback on why they chose an online format rather than a program offered primarily on-campus or at another physical location. Convenience and scheduling flexibility reasons top the list, followed by employer incentives and the limited availability of programs in a specific area of study.

This year our survey found additional reasons students chose to study online. Some shared that online courses are one way to manage social anxieties related to attending courses in-person or on campus. Other students said that transportation issues make attending in-person classes challenging.

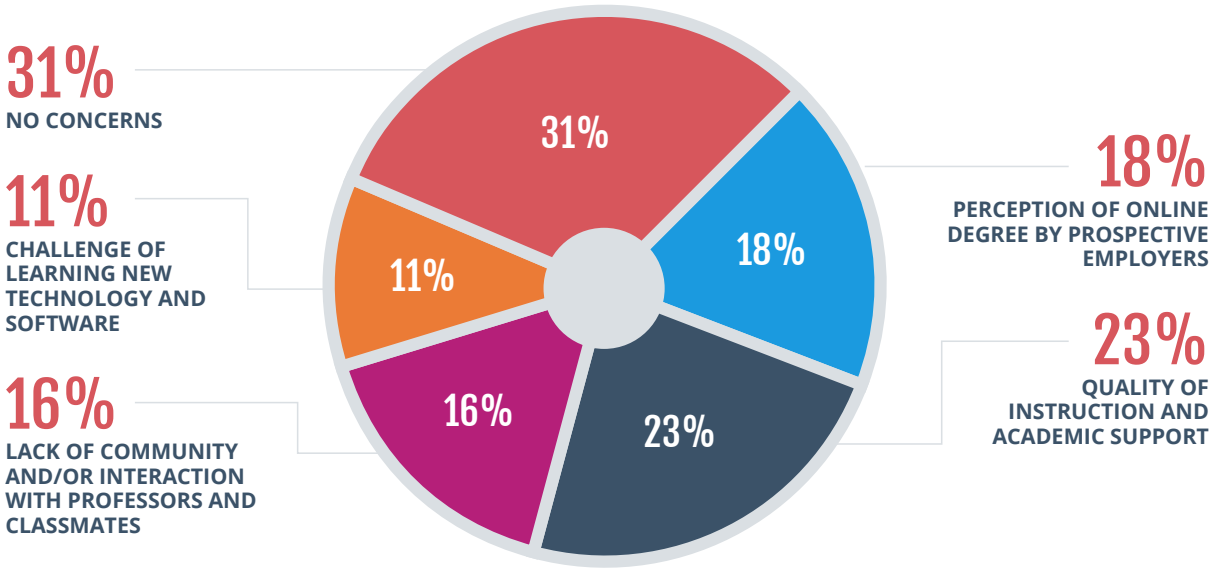
Reasons for Choosing Online vs. On-Campus Learning Options



2018'S TOP TRENDS

We also asked online students about their potential concerns with choosing an online program instead of a traditional campus-based program. While 23% of students expressed some concern about quality, almost one-third had no concerns at all.

Concerns About Choosing Online vs. On-Campus Education



TECHNOLOGY AND THE ONLINE LEARNING EXPERIENCE

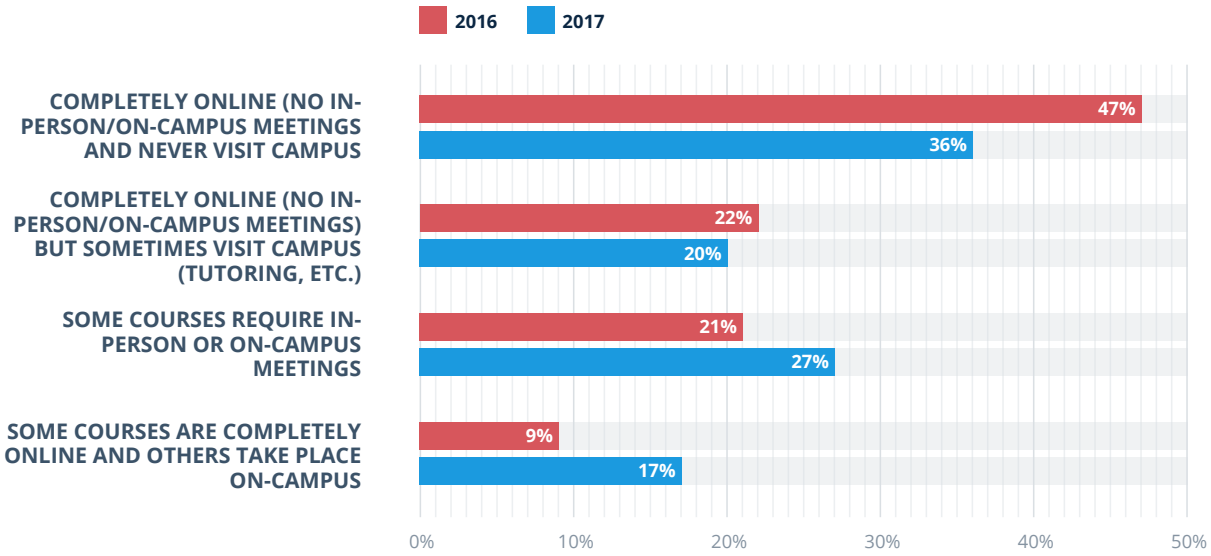
The online students who participated in our study shared that many of their courses include multiple learning environments. We observed a continuation of two trends identified last year, which include an increase in blended (also known as hybrid) courses that have both online and on-site participant requirements, and the use of synchronous applications to engage students in scheduled class meetings at a distance.

Blended/Hybrid Courses and Programs

Almost two-thirds (64%) of students who are currently enrolled in an online degree or certificate program report that they visit a campus location either by choice or because their program has an in-person requirement. This is an increase from 52% last year.
This year we saw a drop in the number of students reporting that their programs are "completely online," and an increase in those reporting in-person requirements or completely on-campus courses as part of their academic programs.

2018'S TOP TRENDS

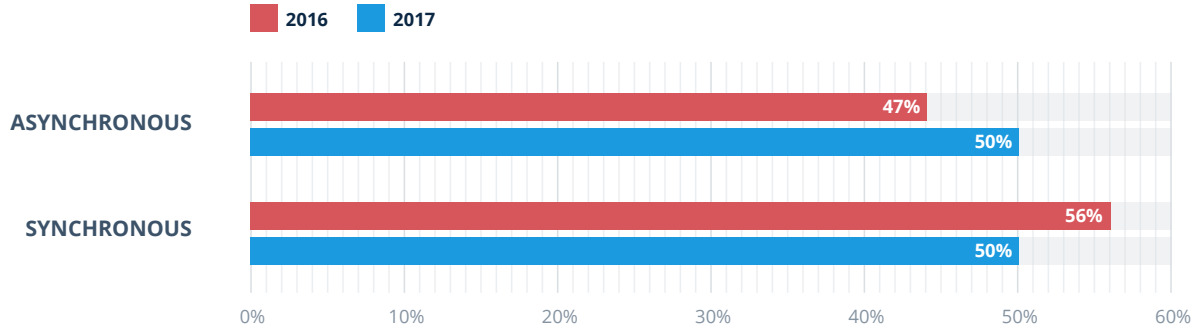
Online Course Formats and Requirements



Sychronous Requirements

We also asked students about the use of synchronous tools in their courses - 50% of those currently enrolled in online or blended programs said they have some synchronous component to their courses (i.e., must attend live, scheduled class meetings). While these numbers have decreased somewhat from last year, as the technologies used to initiate real-time meetings at a distance get easier to use and access via learning management systems, live sessions are still common in online courses.

Use of Synchronous Communication in Online Courses



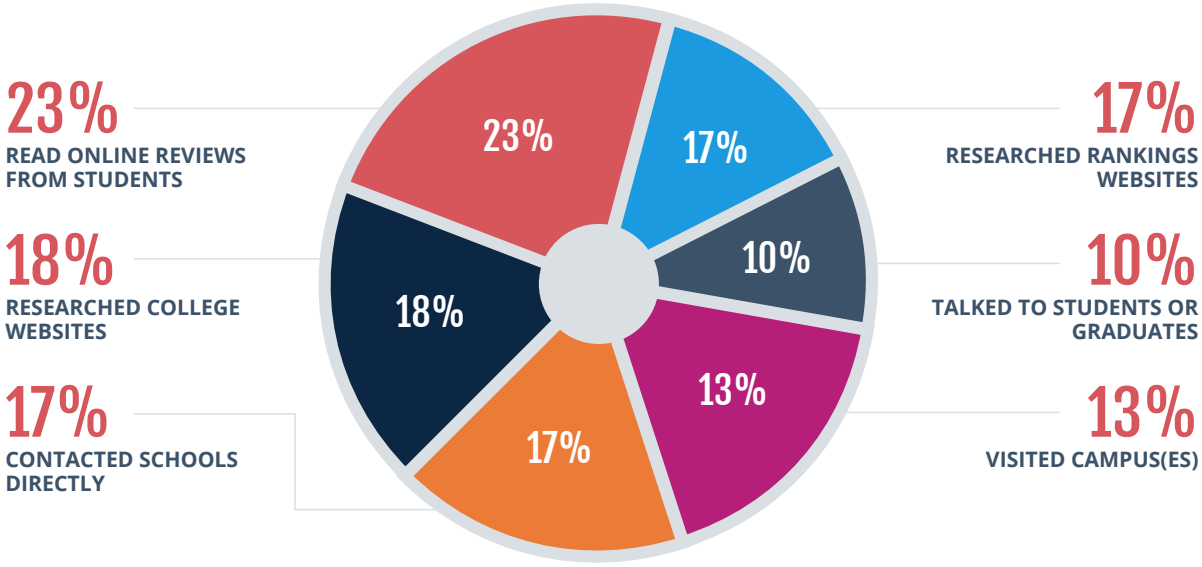
ONLINE PROGRAM MARKETING AND RECRUITMENT

Successfully enrolling new online students requires schools to take a strategic approach to reaching them where they are, and to supply them with the information they need to make a decision to apply. Understanding how students are researching their options, the challenges they face, and their perceptions of online education is a good place to start.

HOW DO ONLINE STUDENTS CHOOSE A PROGRAM?

We asked online alumni several questions, including how they chose their programs, the most significant roadblocks to making that decision, and what they would do differently if they went through the process again. For the latter question, the most common response (23%) was "read online reviews from students," followed by "researched college websites" (18%)

How Prospective Students Research Online Programs



BEST COLLEGES INSIGHT

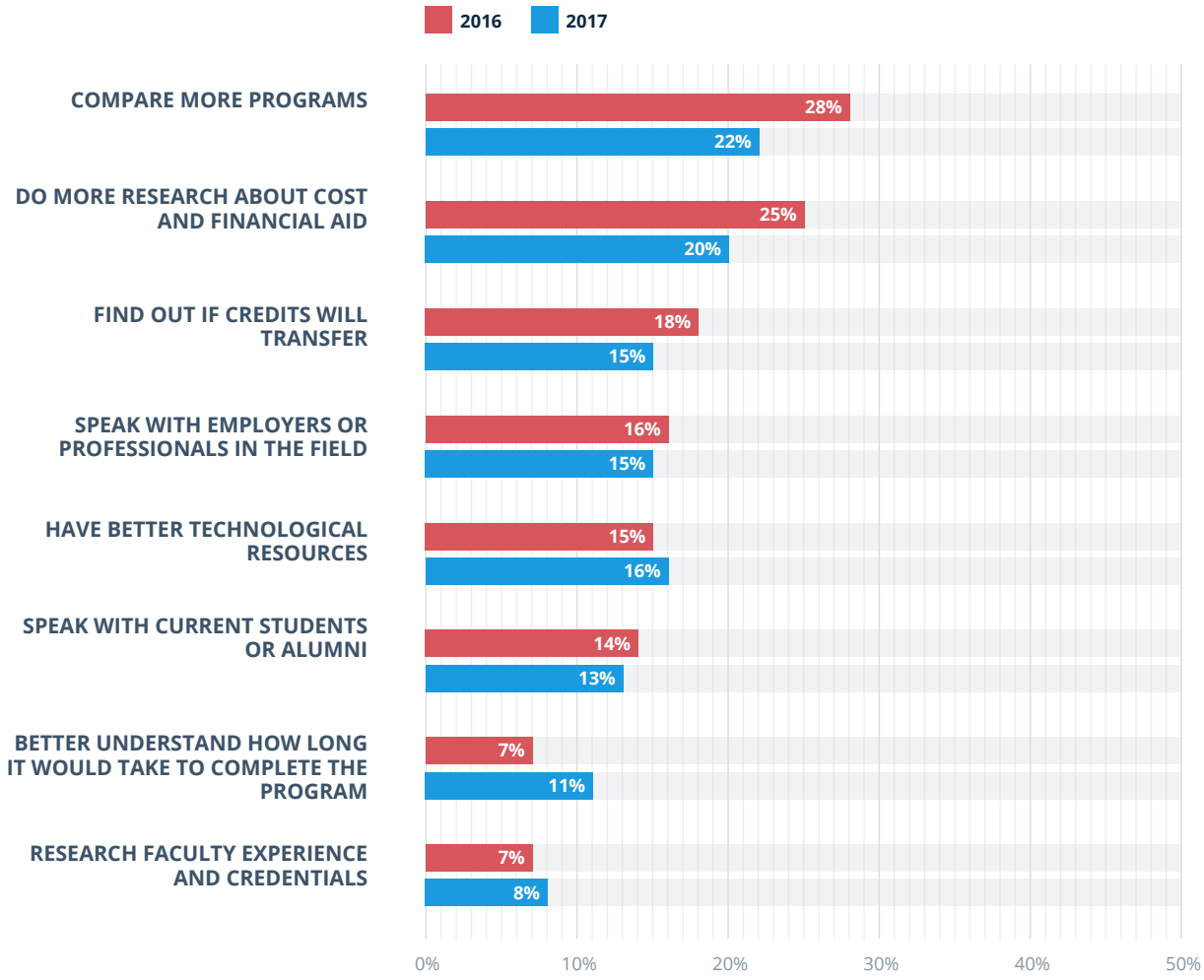
Prospective students want to hear from students who are already enrolled in the programs they are interested in attending. Look for opportunities to add current student and alumni stories, testimonials, and profiles to your program websites. If you participate in college days or fairs at regional high school locations, try to connect current students and alumni with prospective students at in-person events as well.

ONLINE PROGRAM MARKETING AND RECRUITMENT

ADVICE FROM ONLINE ALUMNI

When we asked online program graduates about their lessons learned, most expressed regret that they hadn't done more research. They recommended that those currently considering online education compare more programs, and do more research about costs and financial assistance. These recommendations mirror those reported last year. This year we also saw a small increase in the number of online alumni who wish they had better understood how long it would take to complete their programs.

What Graduates Would Do Differently Before Choosing an Online Program



ONLINE PROGRAM MARKETING AND RECRUITMENT

BEST COLLEGES INSIGHT

Providing easy access to information about your online programs (e.g., costs, financial aid, course sequence, program length) can help students make better decisions about which programs best fit their needs and goals. Consider how your institution could present this information in various formats and locations, and how you can display it so that students can compare these details across programs.

As students research potential online learning options, what are the biggest challenges they face when deciding which program to attend?

The top two reported challenges this year were the same as those found last year: estimating annual costs and applying for financial aid and identifying other funding sources. The rest of the list changed, however, as more students reported having difficulty finding a program that was a match for their needs and interests this year.

6 Biggest Challenges Students Face - Choosing an Online Program

	2016	2017
Estimating actual costs (tuition, books, etc.)	#1	#1
Applying for financial aid and identifying sufficient funding sources	#2	#2
Finding a program that met my needs and interests	#6	#3
Finding information about how graduates fared in the workplace	#5	#4
Finding sufficient information about academic requirements	#3	#5
Contacting a real person to ask detailed questions about specific programs	#4	#6

ONLINE PROGRAM MARKETING AND RECRUITMENT

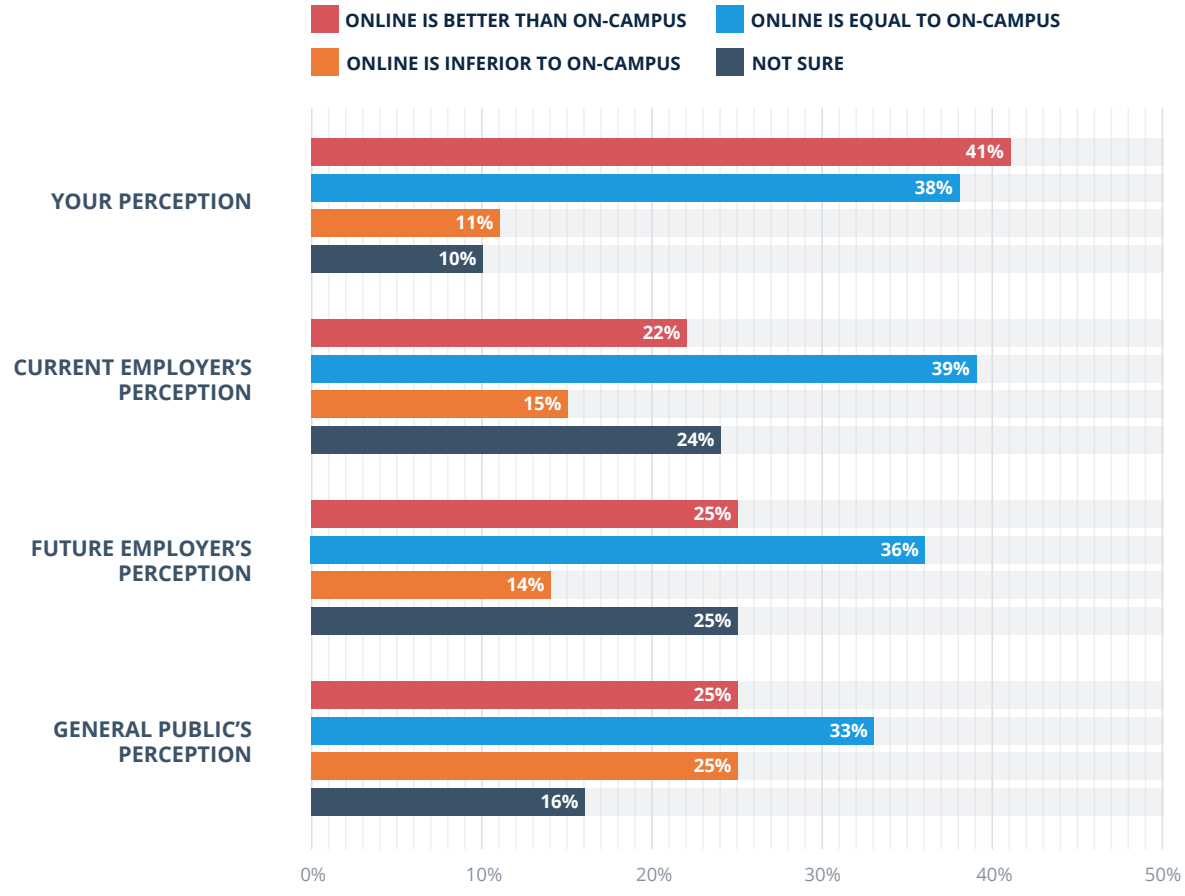
BEST COLLEGES INSIGHT

While the top two challenges remained the same from our survey last year, we saw a significant increase in the number of students who struggled to find the right program for their needs and interests. This category was the third most commonly selected challenge, and had a substantially higher response rate for this issue than we observed last year. This may be related to a younger population of students that aren't as sure of their goals, or to having more schools and programs to choose from in their field of interest. Promoting the ways in which your online programs are unique can help prospective students narrow their options, funneling those who will find your program a good fit to your school.

PERCEPTIONS OF AN ONLINE EDUCATION

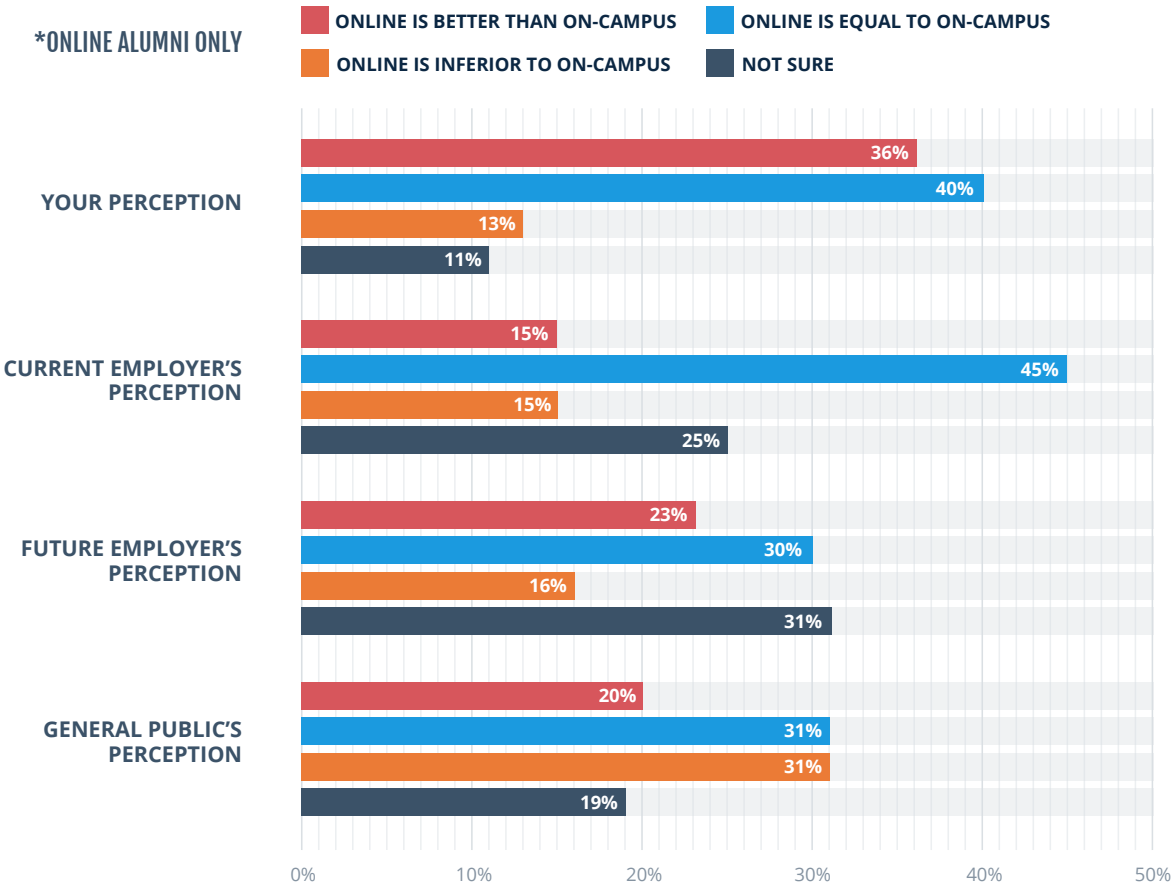
In an effort to develop a broader understanding of how the perception of online education may be shifting, we added several questions for both our students and school administrators to the study this year. A majority of students (79%) felt that online learning is either "better than" or "equal to" on-campus learning. They reported similar thoughts about their employer's (61%), future employer's (61%), and the general public's (58%) perception of online learning.

Student Perceptions of Online Education



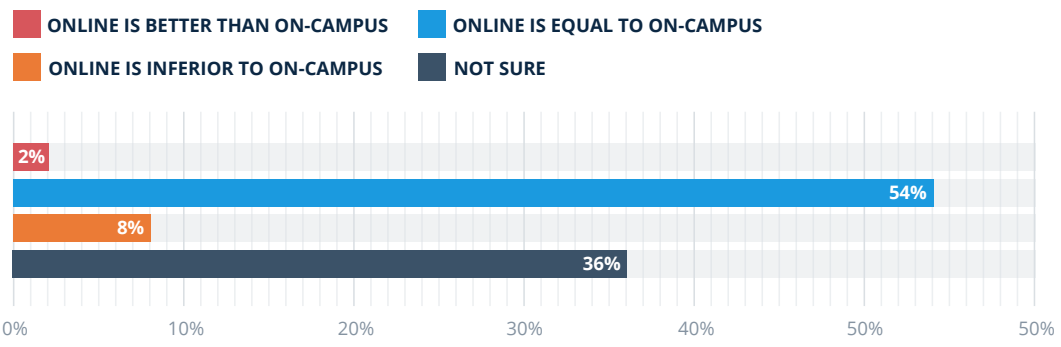
ONLINE PROGRAM MARKETING AND RECRUITMENT

Online Program Alumni Perceptions of Online Education*



Additionally, our school respondents reported that the majority of employers recruiting and hiring their online graduates see online education as equal to on campus education.

School Administrator Perceptions of Employer Attitudes About Online Education



ONLINE PROGRAM MARKETING AND RECRUITMENT

BEST COLLEGES INSIGHT

While diplomas and transcripts usually don't indicate "online" or "on-campus" learning, there may still be biases, or perceived biases, related to hiring. Career goals are important to online and on-campus students alike, and understanding how employers are receiving your graduates can help you make decisions about both curriculum and student support services. Yet, more than one-third of online program administrators aren't sure what kind of climate their alumni face when talking with employers about their online academic preparation. Are you, or is someone in your institution, tracking employer feedback about online program graduates? Consider working with not only marketing and outreach offices, but also the career center and alumni network to find out more.

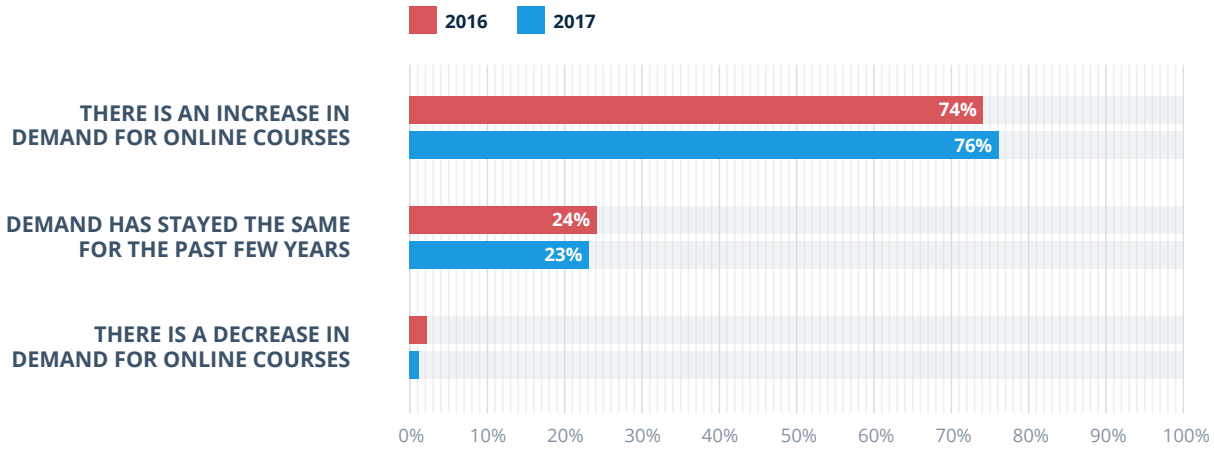
ONLINE PROGRAM DESIGN AND DEVELOPMENT

We asked school administrators to share information about the demand for online courses at their institutions, their budgeting plans for the coming year, and how they are serving the needs of specific students.

PROGRAM DEMAND AND BUDGETS

In our survey of online school administrators this year, 76% of respondents said "there is an increase in demand for online courses" at their institutions. An overwhelming majority, 99%, reported that demand is either increasing or has held steady for the past few years.

Demand for Online Courses

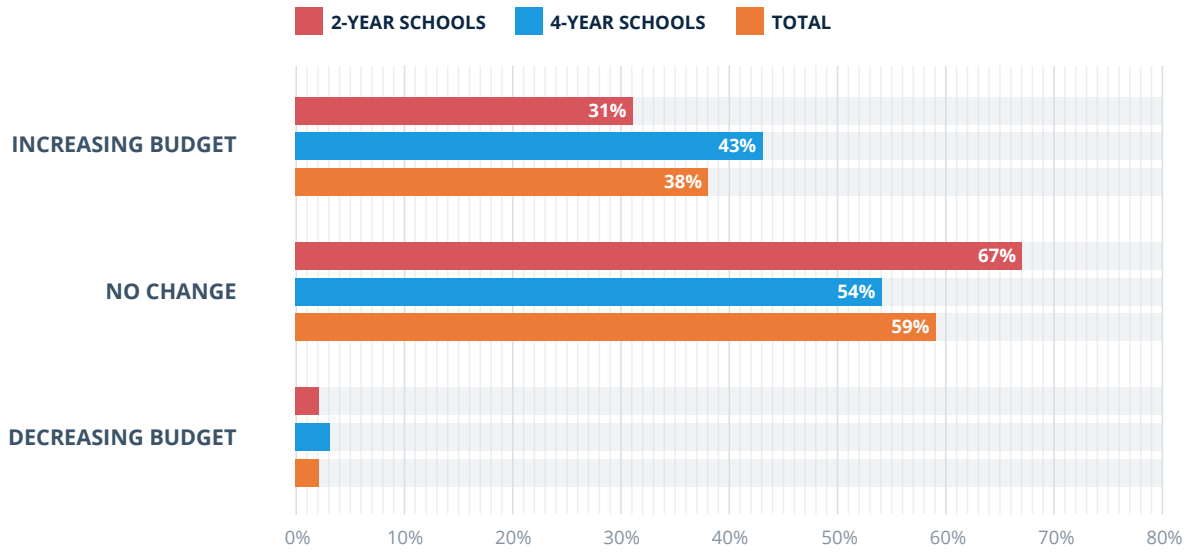


Despite the expected increase in demand, not all schools are planning to increase their budgets for developing these programs. A little more than half (59%) do not anticipate any change in their current budgets, which is similar to the trend we identified last year. We are also seeing four-year institutions increasing their online education budgets at a higher percentage (51%) than two-year institutions (25%). One way to interpret this data is to suggest that while the number online programs is still growing, the rate of that observed growth more or less held steady.

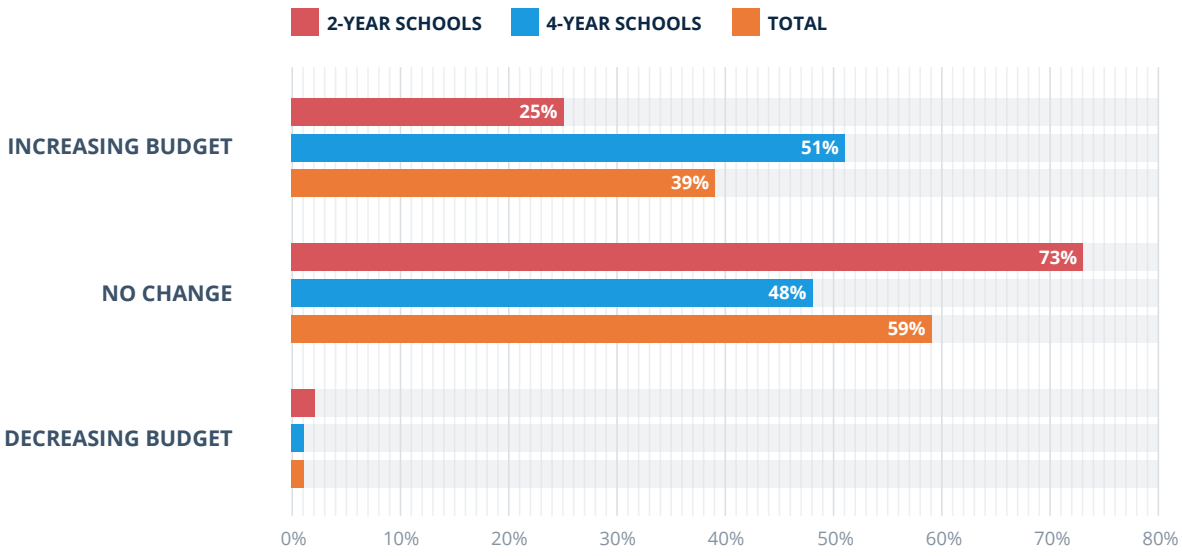
ONLINE PROGRAM DESIGN AND DEVELOPMENT

SCHOOL BUDGET FOR ONLINE PROGRAM DEVELOPMENT

Plans for Online Program Development in 2017



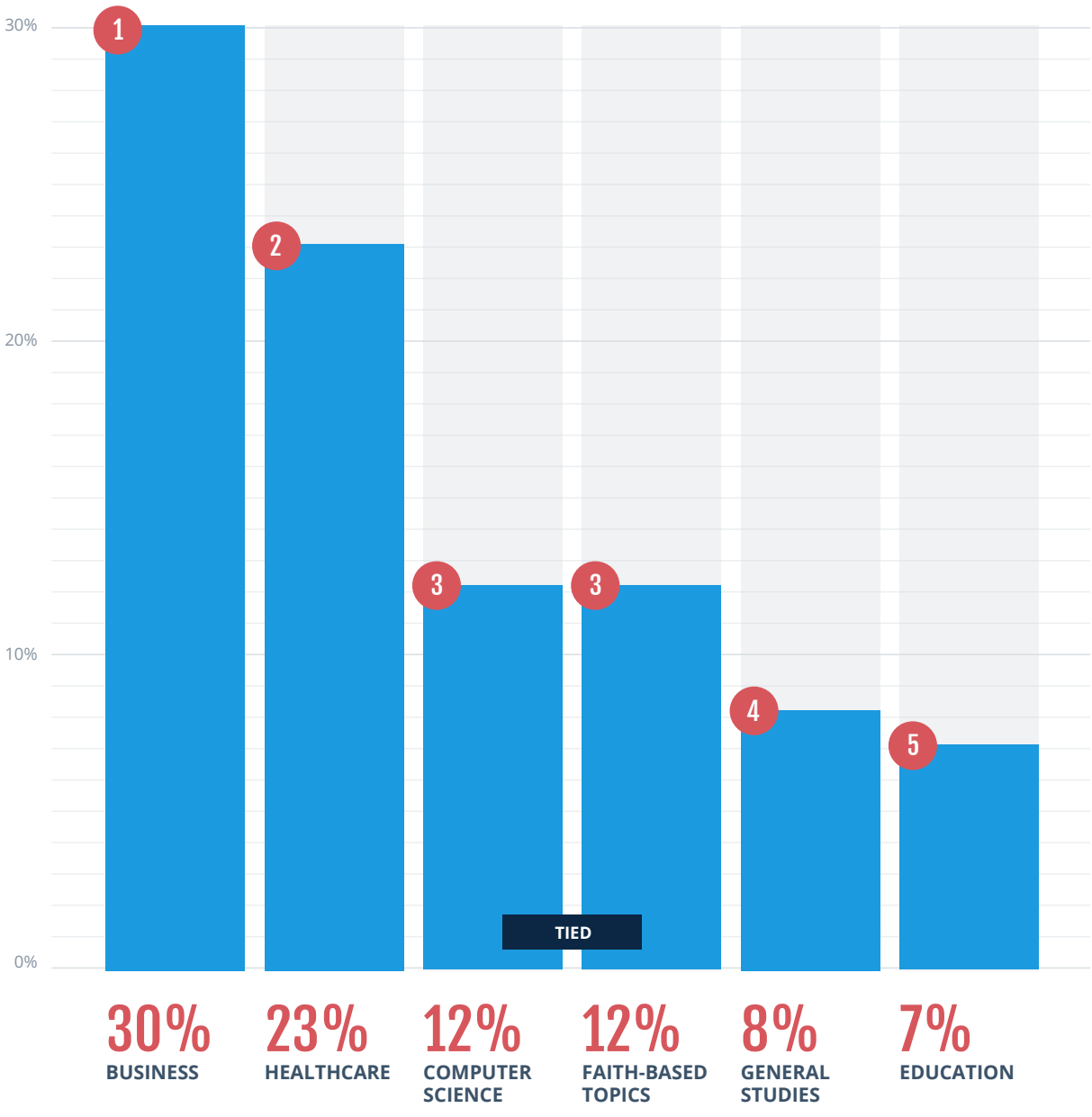
Plans for Online Program Development in 2018



ONLINE PROGRAM DESIGN AND DEVELOPMENT

Which programs will have the most students over the next five years? The schools responding to our survey predict that business and related subject areas (e.g., logistics, accounting, management) will have the most growth, followed by healthcare and medical subjects (e.g., medical coding, nursing, healthcare administration), and computer science (e.g., software engineering, cybersecurity, game design).

Top Areas for Growth in the Next 5 Years - Academic Disciplines

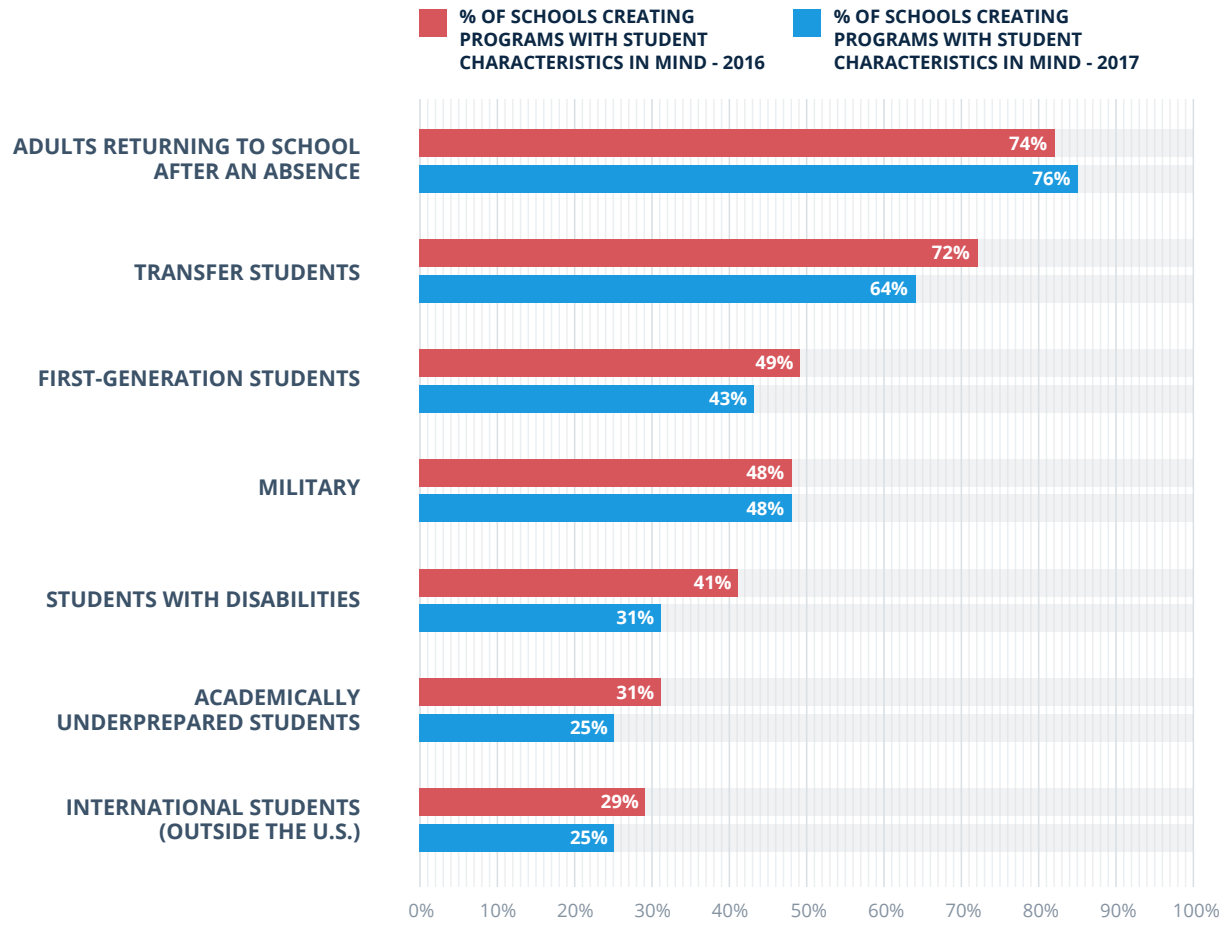


ONLINE PROGRAM DESIGN AND DEVELOPMENT

SERVING DIVERSE STUDENT POPULATIONS

Today's online students come from a variety of educational and professional backgrounds. Last year we found that the majority of schools consider the characteristics of these students when designing new online programs. That trend continues this year with a focus on adults returning to school after an absence and transfer students.

Online Program Design for Student Population Characteristics

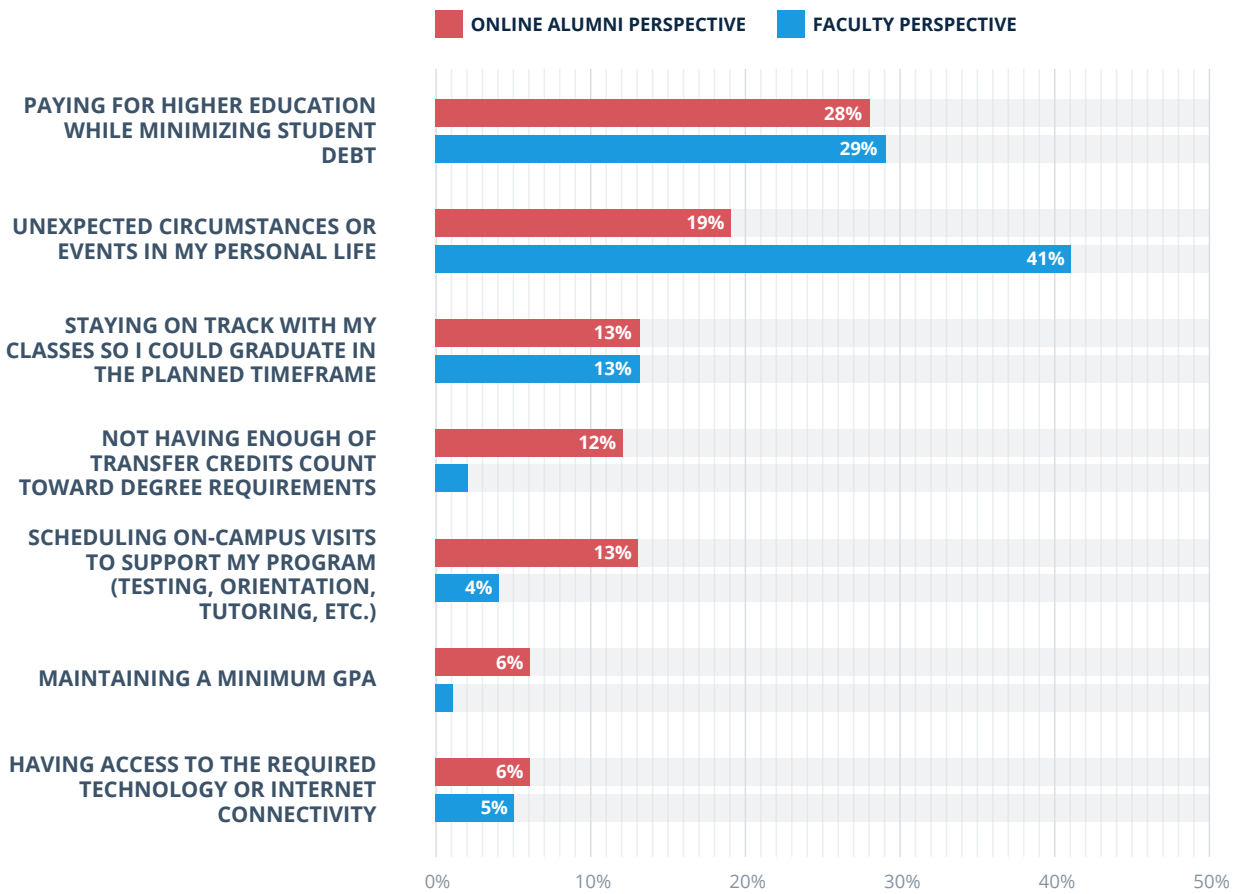


REMOVING ROADBLOCKS TO GRADUATION

Our student survey revealed some of the top "roadblocks" to completing an online education. Those who reached graduation ranked paying for higher education while minimizing student debt and unexpected circumstances or events in my personal life as the biggest challenges they currently face.

This year we also asked the administrators who identified themselves as faculty members to identify their students' biggest roadblocks at the course level. Dealing with life events, such as a death in the family, birth of a child, natural disaster recovery, or job promotion can interrupt a student's momentum and motivation. Teachers expressed an awareness of how these events can affect students in an online program.

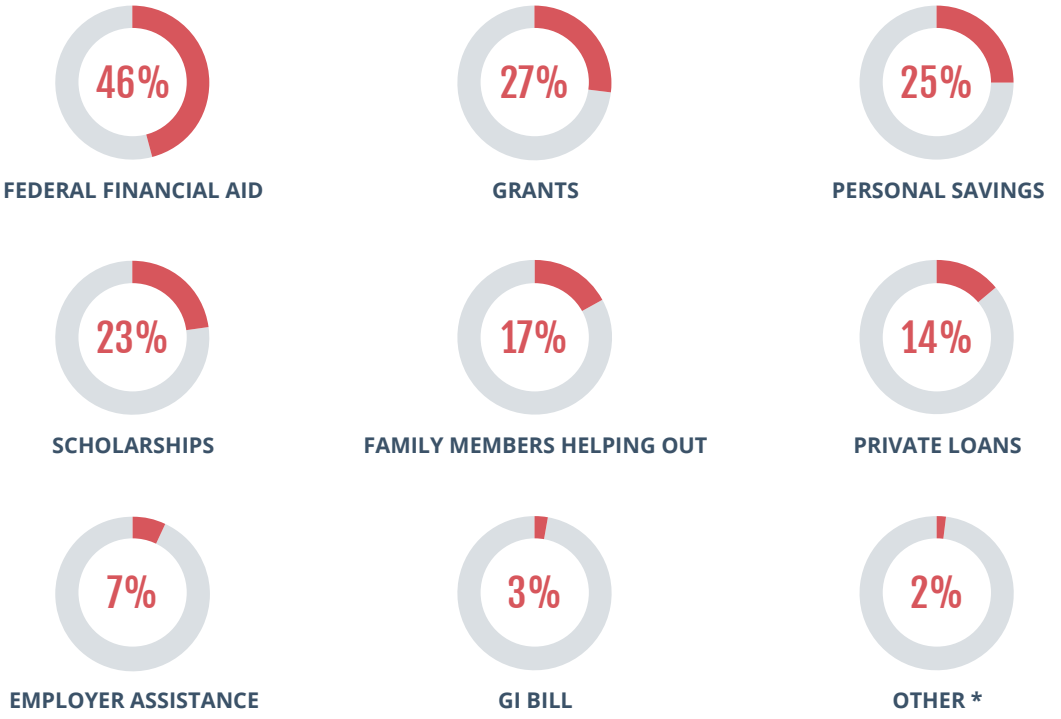
Top Roadblocks to Completing an Online Program



ONLINE PROGRAM DESIGN AND DEVELOPMENT

Financial considerations and concerns emerged here, as well as in several areas of our student survey. This year we asked students to share details about how they are paying for their online programs. Many students shared that they rely on multiple sources of funding, which include primarily federal financial aid (46%).

How Online Students Pay for Their Programs



* (e.g., college prepaid programs, cash payment plans, fundraising)

BEST COLLEGES INSIGHT

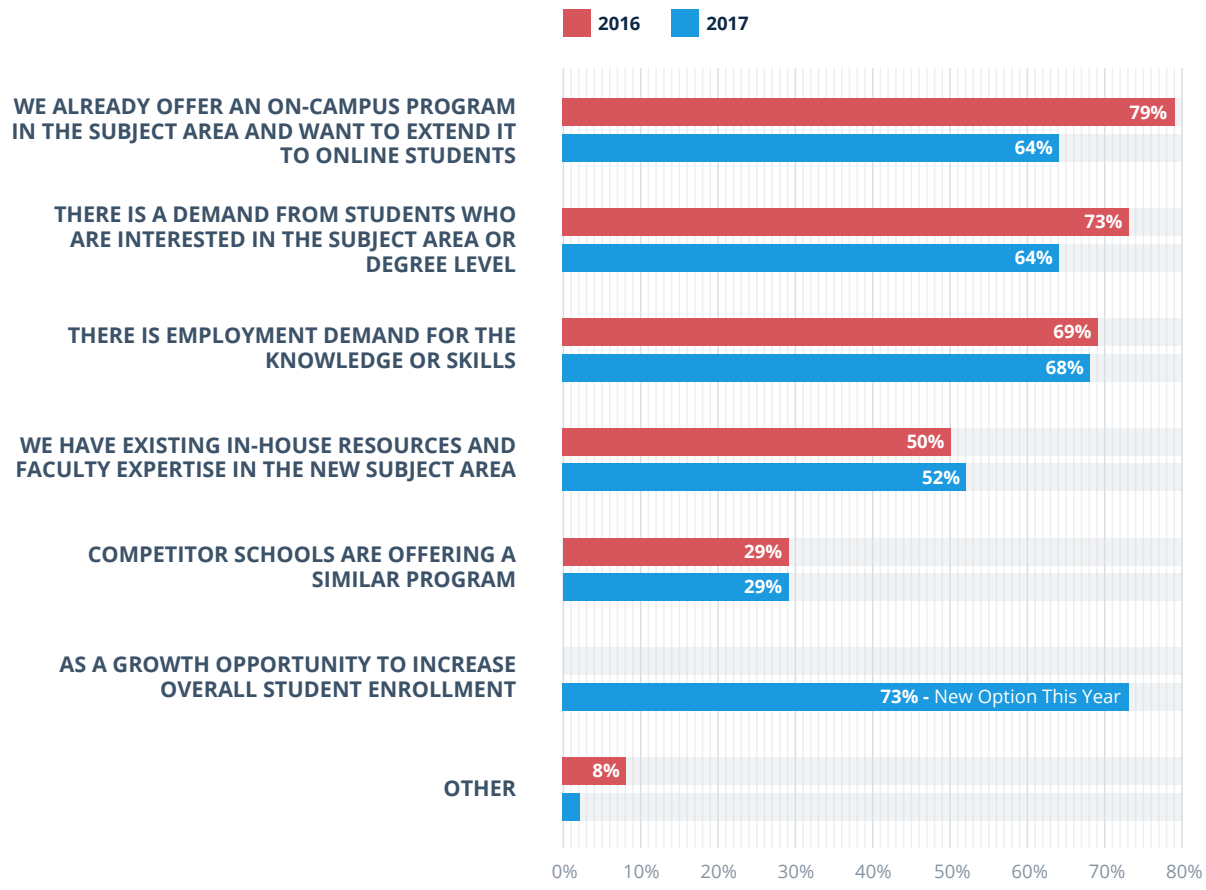
Among the many potential roadblocks to graduation are situations in which schools can help support students. Proactively helping students by providing financial aid assistance and personal finance training, as well as time and stress management counseling, can help keep distance learners in school. Facilitating interactions with friendly, helpful, and knowledgeable staff members can make a difference with students. It may also be beneficial to provide faculty members with guidelines for referring students to these resources and training them to assist students experiencing hardship.

ONLINE PROGRAM DESIGN AND DEVELOPMENT

LAUNCHING NEW PROGRAMS

Our school survey provided some insight into how institutions make the decision to offer a new online program, as well as the challenges they face to implement one successfully. This year we observed a shift in the reasons why a school decides to develop a new online program. The top factors in 2016 were we already offer an on-campus program in the subject area and want to extend it to online students (79%) and there is a demand from students who are interested in the subject area or degree level (73%). This year's top responses are as a growth opportunity to increase overall student enrollment (73%) and there is employment demand for the knowledge and skills (68%).

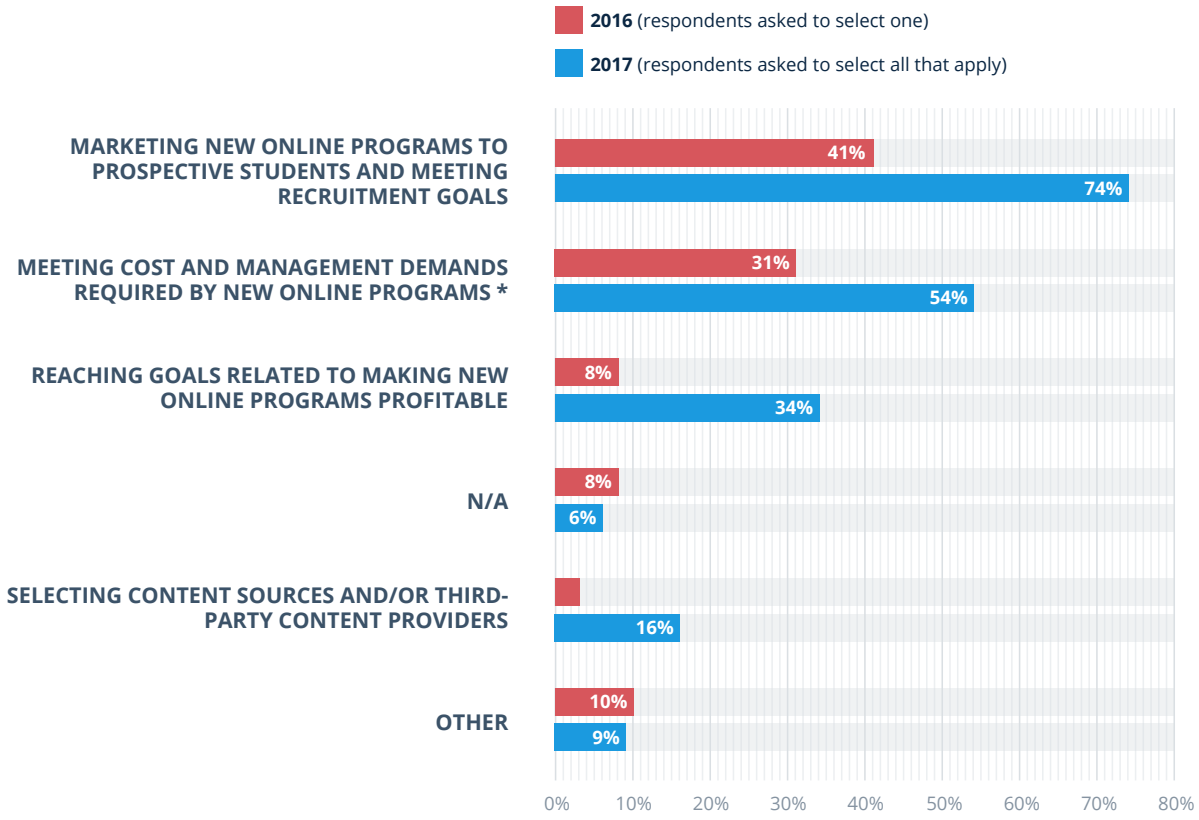
What is the Primary Factor in the Decision to Offer a New Online Program?



ONLINE PROGRAM DESIGN AND DEVELOPMENT

Choosing to offer a new online program is an arduous process, and is only the beginning of a successful launch. Once a school decides to offer a new program, they must complete several tasks to ensure a successful launch, ranging from coordinating course materials to meeting enrollment goals. Our school survey respondents identified marketing new online programs to prospective students and meeting recruiting goals and meeting cost and management demands required by new online programs as their top two challenges two years in a row.

Biggest Challenges Schools Face When Offering Online Programs



* (e.g., faculty training, technology infrastructure, help desk, administrative functions)

The "other" challenges reported by online program administrators this year include:

- Managing staffing needs and teaching loads related to increased enrollments
- Ensuring quality course design and academic rigor
- Getting faculty and campus-wide buy in to offer new online programs

CONCLUSION

Students can pursue more online degrees from more schools than ever before. What can your institution do to better understand the needs of those who are comparing multiple programs? And what can you do to better support these students after they enroll in your online programs? Our research provides suggestions from online program administrators, students, and faculty members.

- Tailor communication strategies to an audience that includes high school students and recent high school graduates.
- Share how each of your online programs is designed to meet the needs of specific student populations and goals, and how your institution or program is unique.
- Consider the perspectives of a wider range of learners in your online courses, to include those logging in from International and out-of-state locations, as well as those enrolled in courses both on campus and online.
- Provide easy, transparent access to the information students want most: accurate cost expectations, financial assistance processes, and current student/alumni feedback.
- Find out more about how your online graduates are not only employed right after graduation, but also what their employers have to say about their readiness for the workforce.
- Maintain support throughout an online program in the areas students need most financial planning and minimizing debt, managing work-life-school balance, and staying on track toward graduation.

APPENDIX

CONTRIBUTORS

ABOUT MELISSA VENABLE

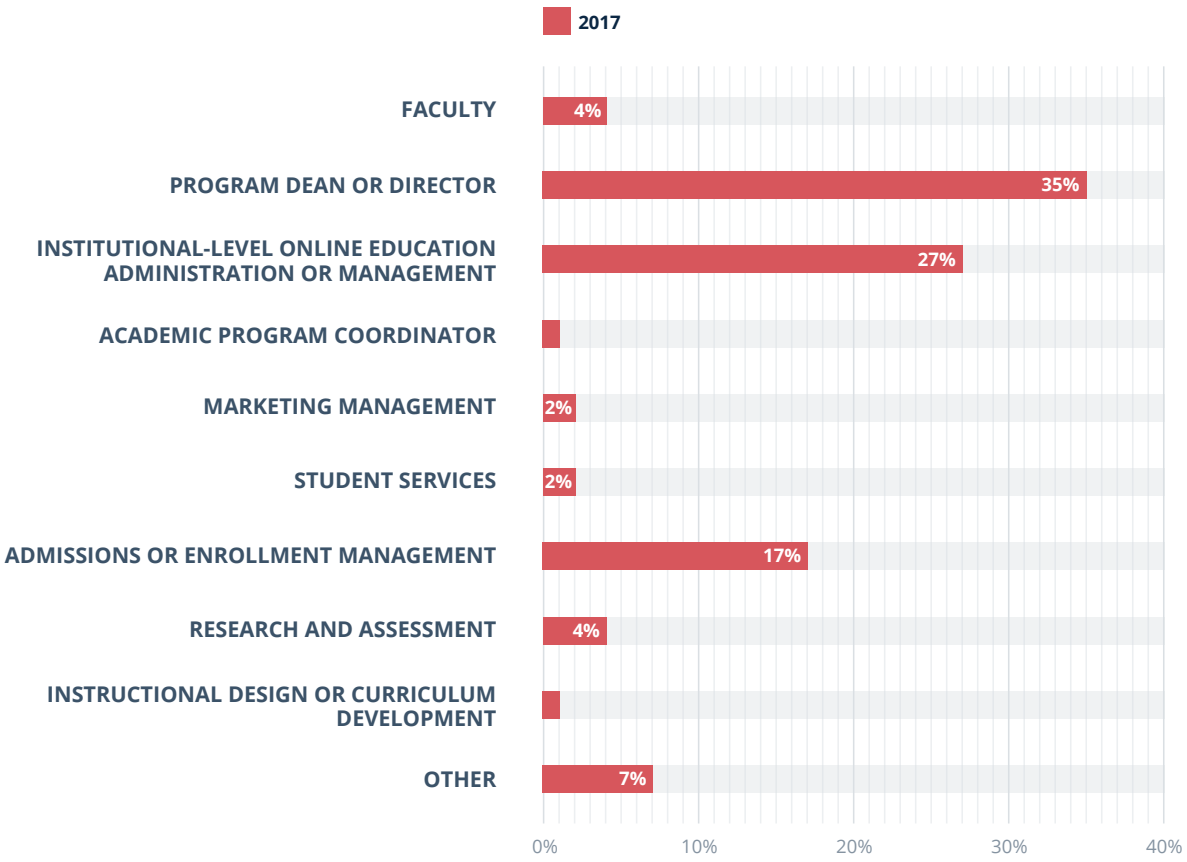
ONLINE EDUCATION ADVISOR

Dr. Melissa Venable has served as an Online Education Advisor and Writer at BestColleges.com and HigherEducation.com. She is also an Adjunct Instructor and Course Designer at Saint Leo University and the University of South Florida, and an Independent Contractor at Design Doc, LLC. Venable has held several Managerial roles in higher education throughout her career including Curriculum Manager, Instructional Designer and Manager and Academic Advisor.

DEMOGRAPHICS

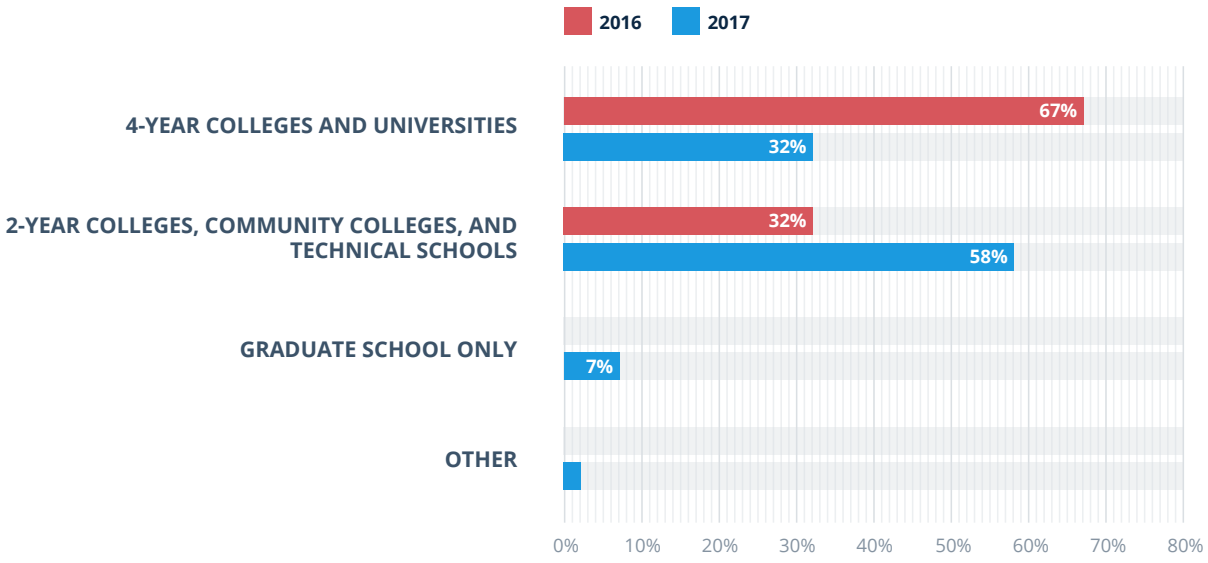
SCHOOL SURVEY PARTICIPANTS

Respondent Role



APPENDIX

Institutional Classification

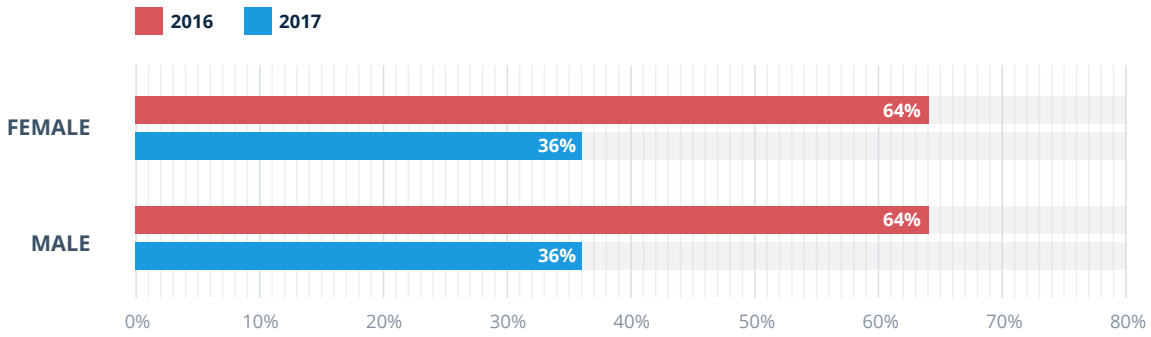


Institutional Type

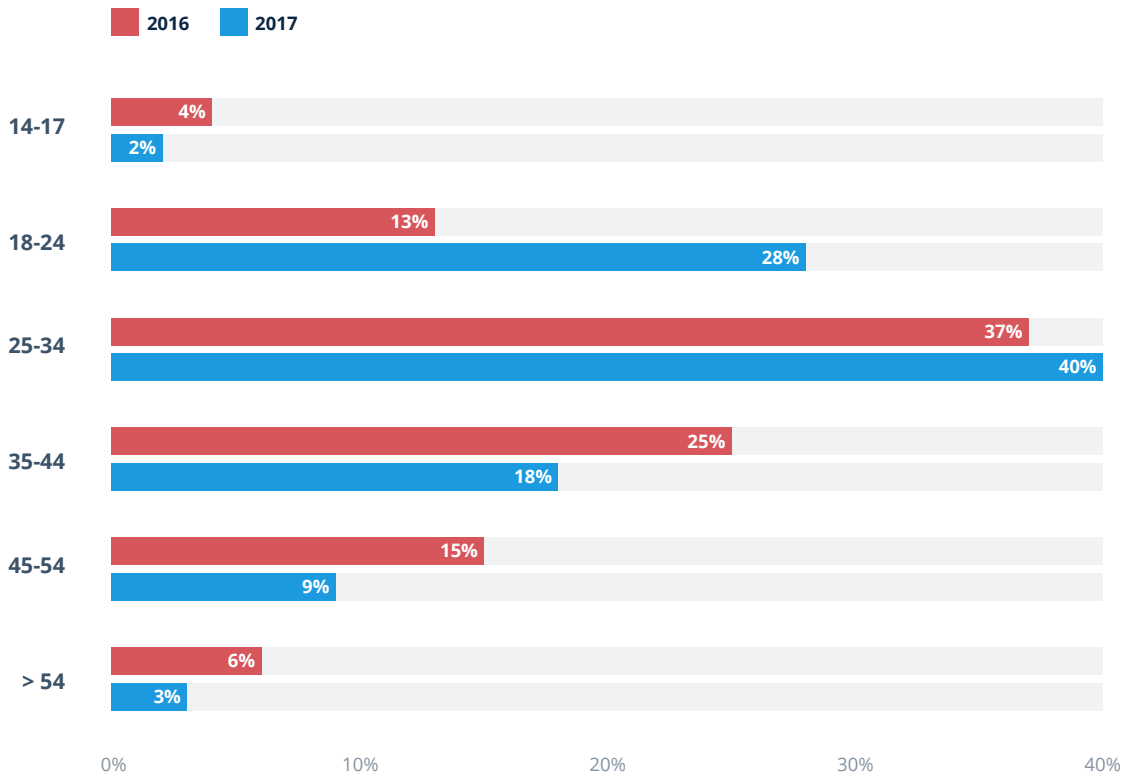
APPENDIX

STUDENT SURVEY PARTICIPANTS

Gender

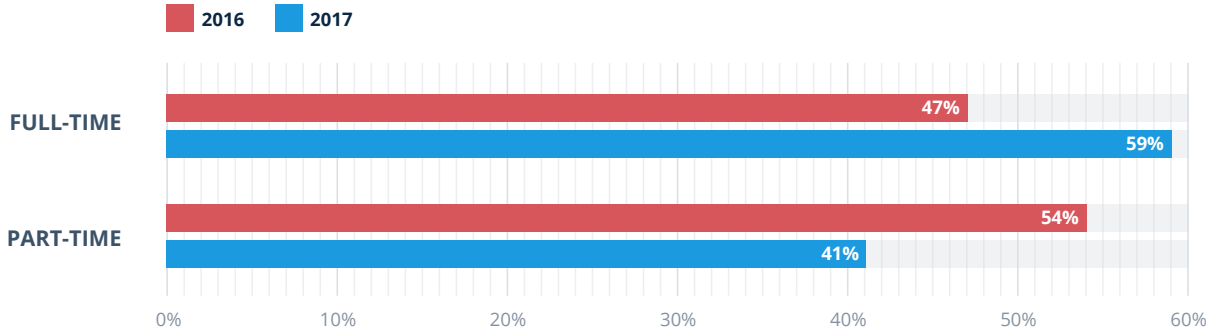


Age

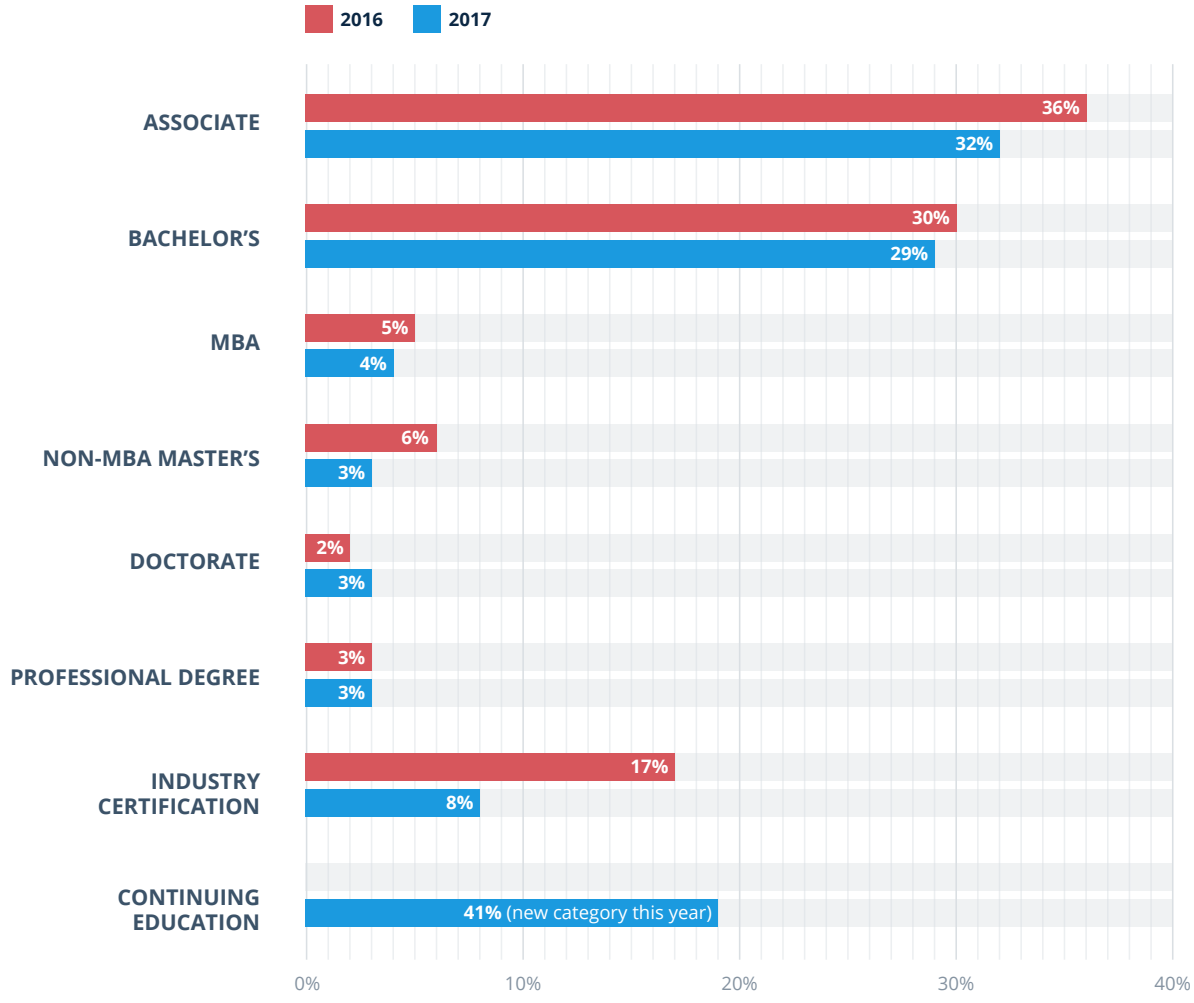


APPENDIX

Enrollment Status

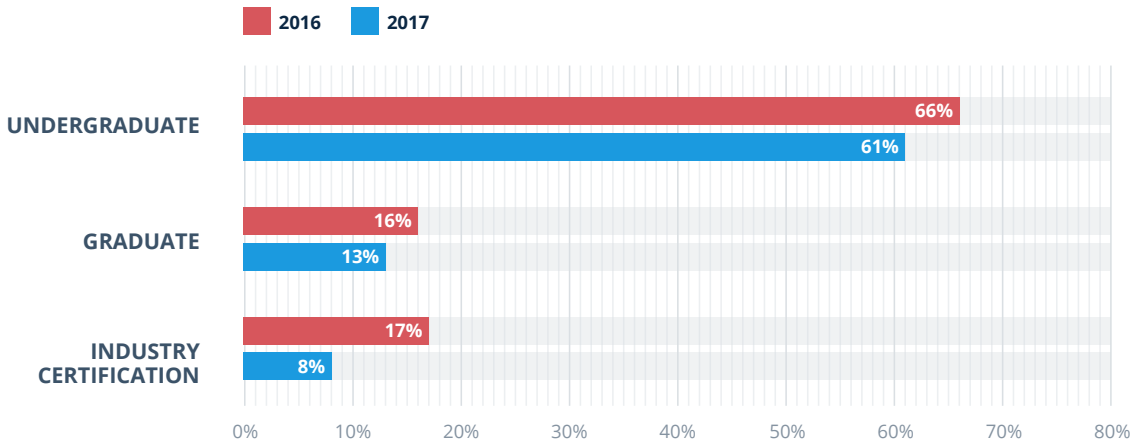


Degree Pursuing

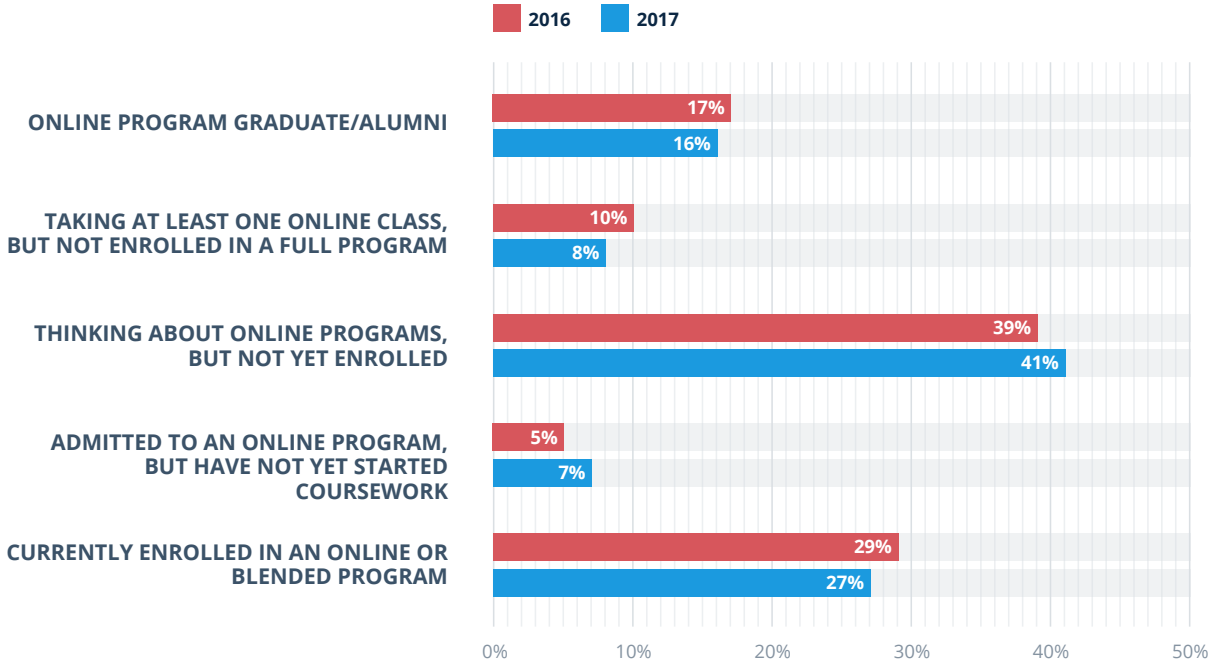


APPENDIX

Enrollment Level

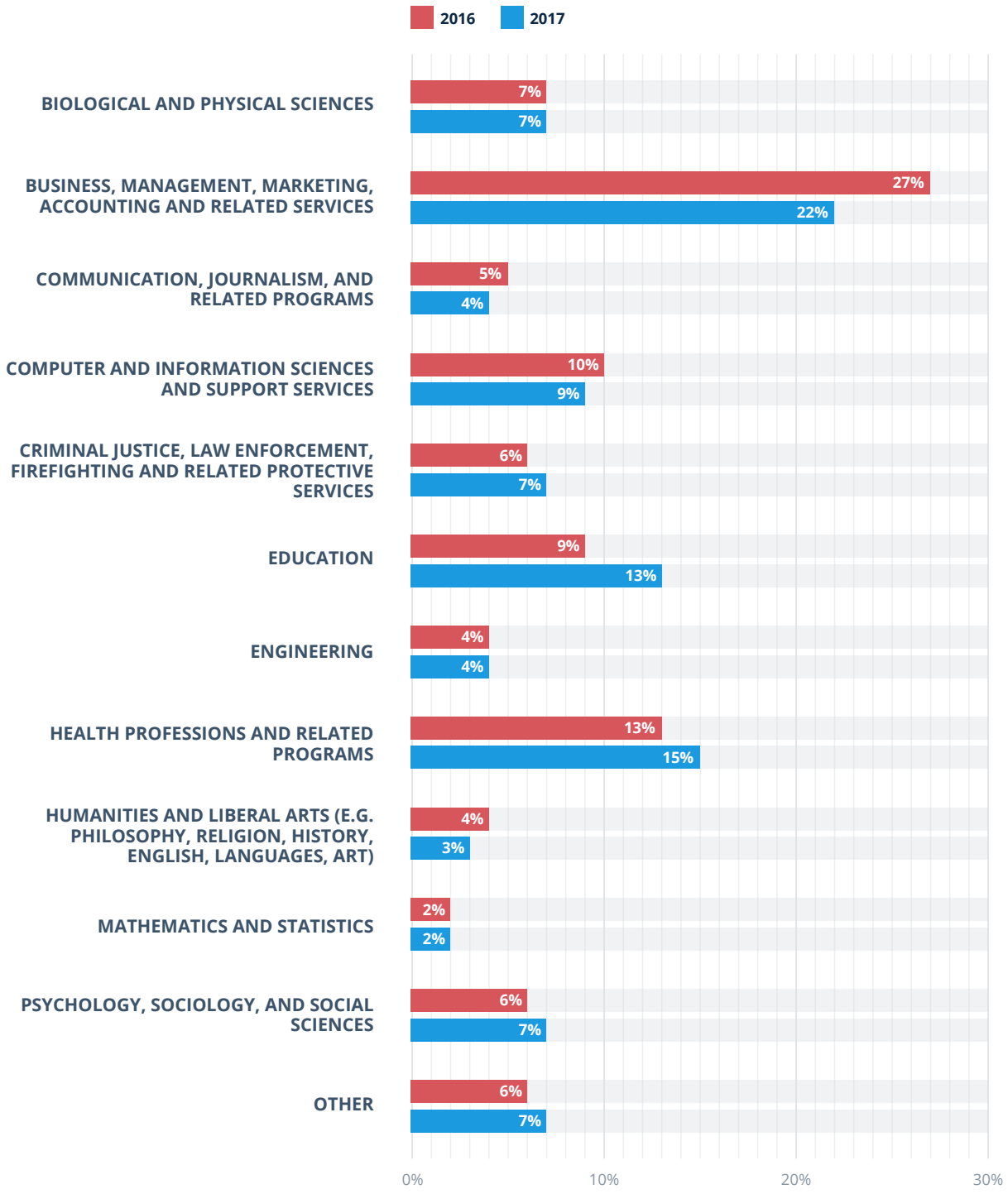


Student Status



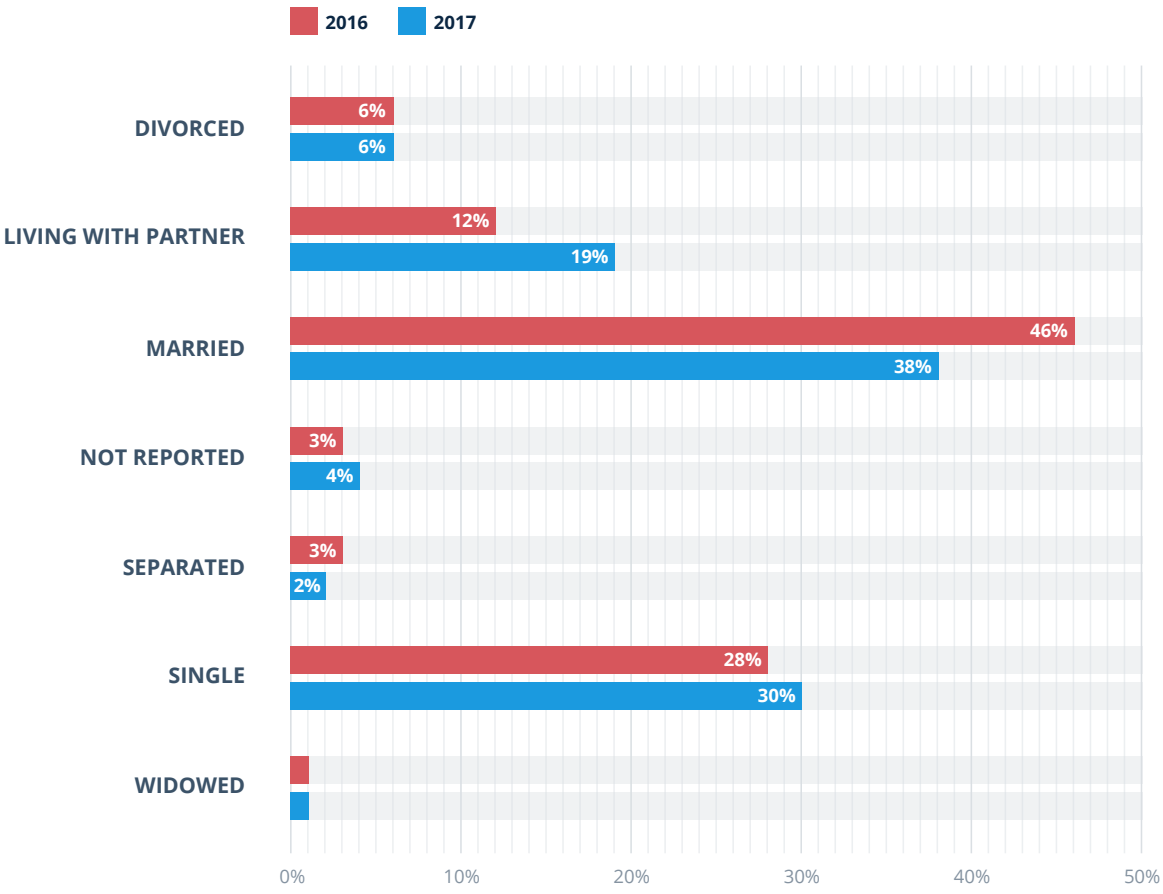
APPENDIX

Major or Intended Major



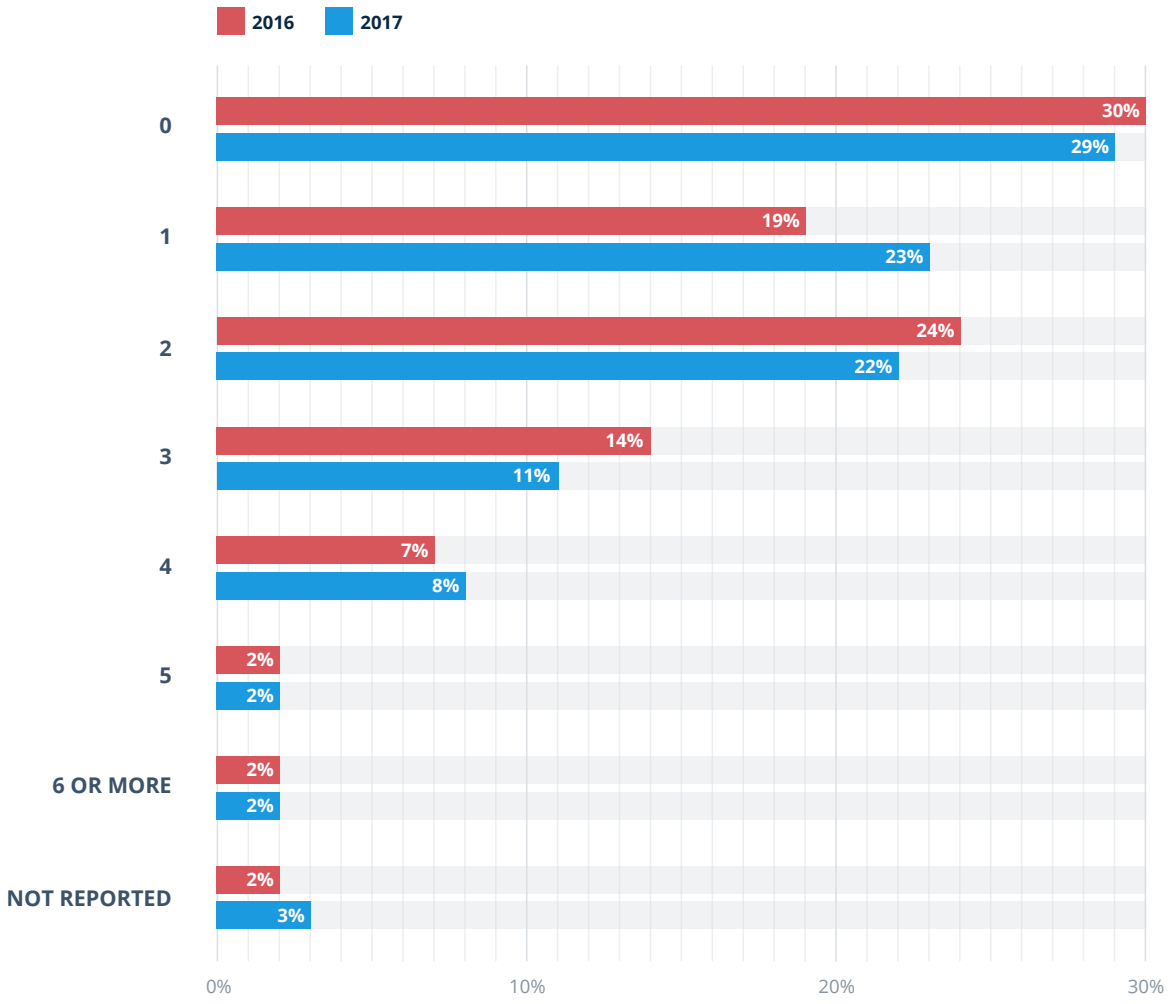
APPENDIX

Marital Status



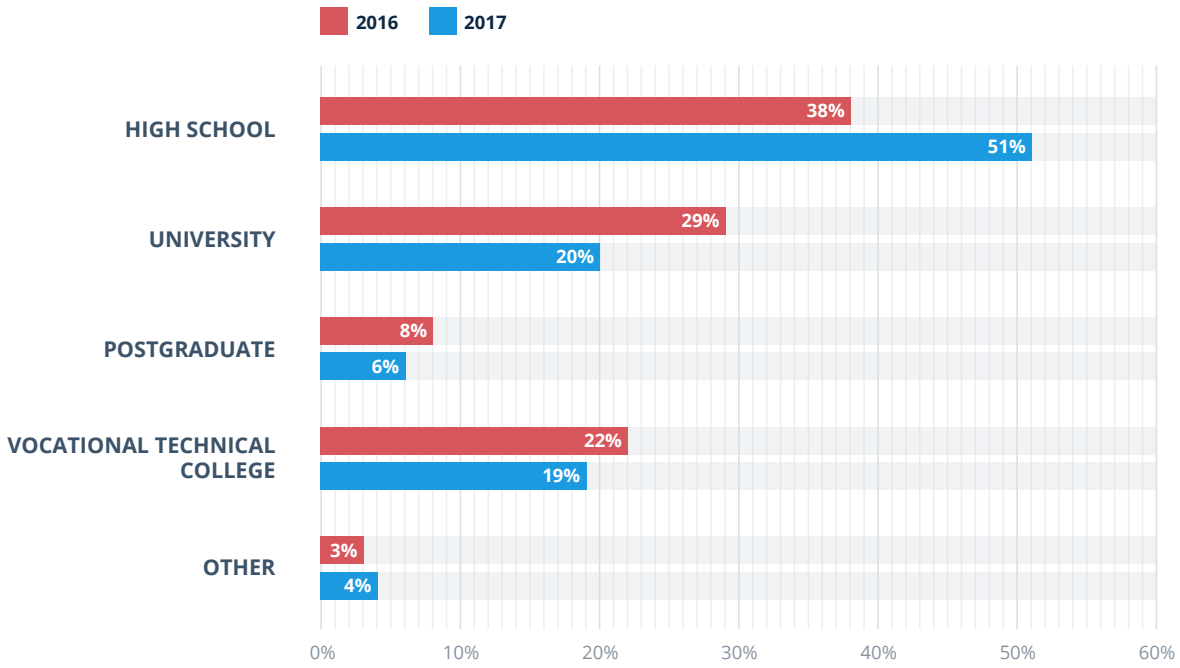
APPENDIX

Number of Children



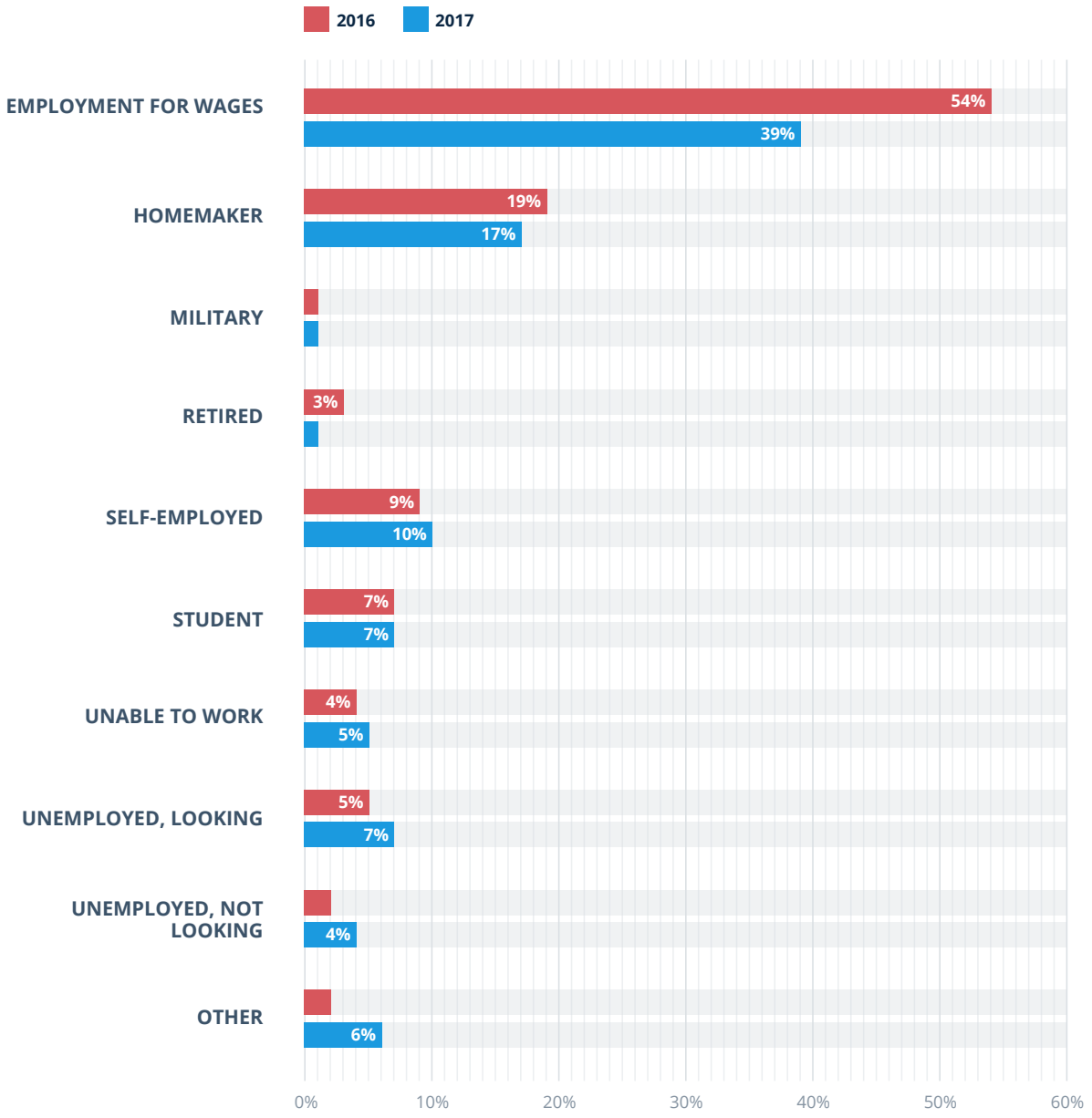
APPENDIX

Education Level



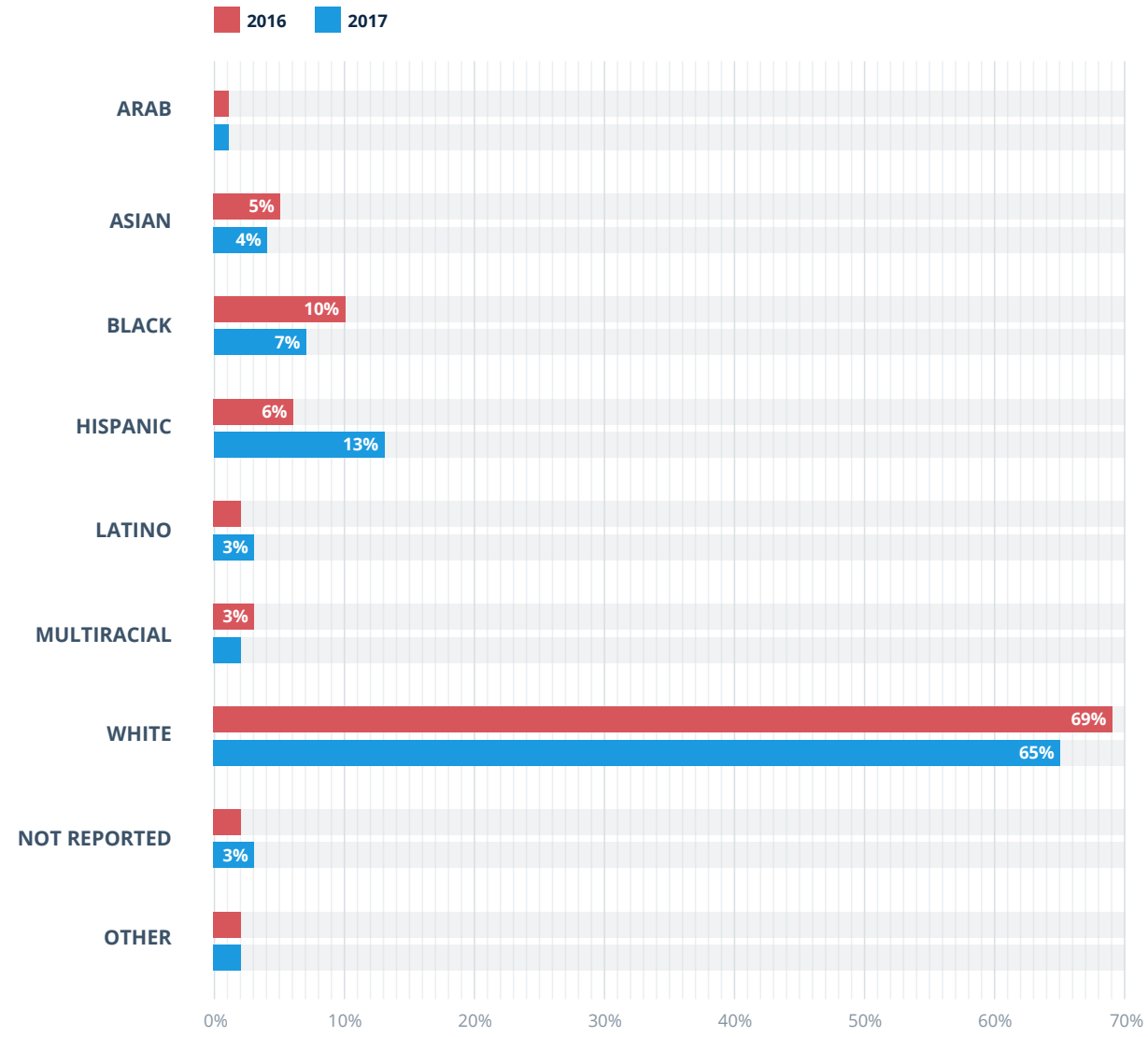
APPENDIX

Employment Status



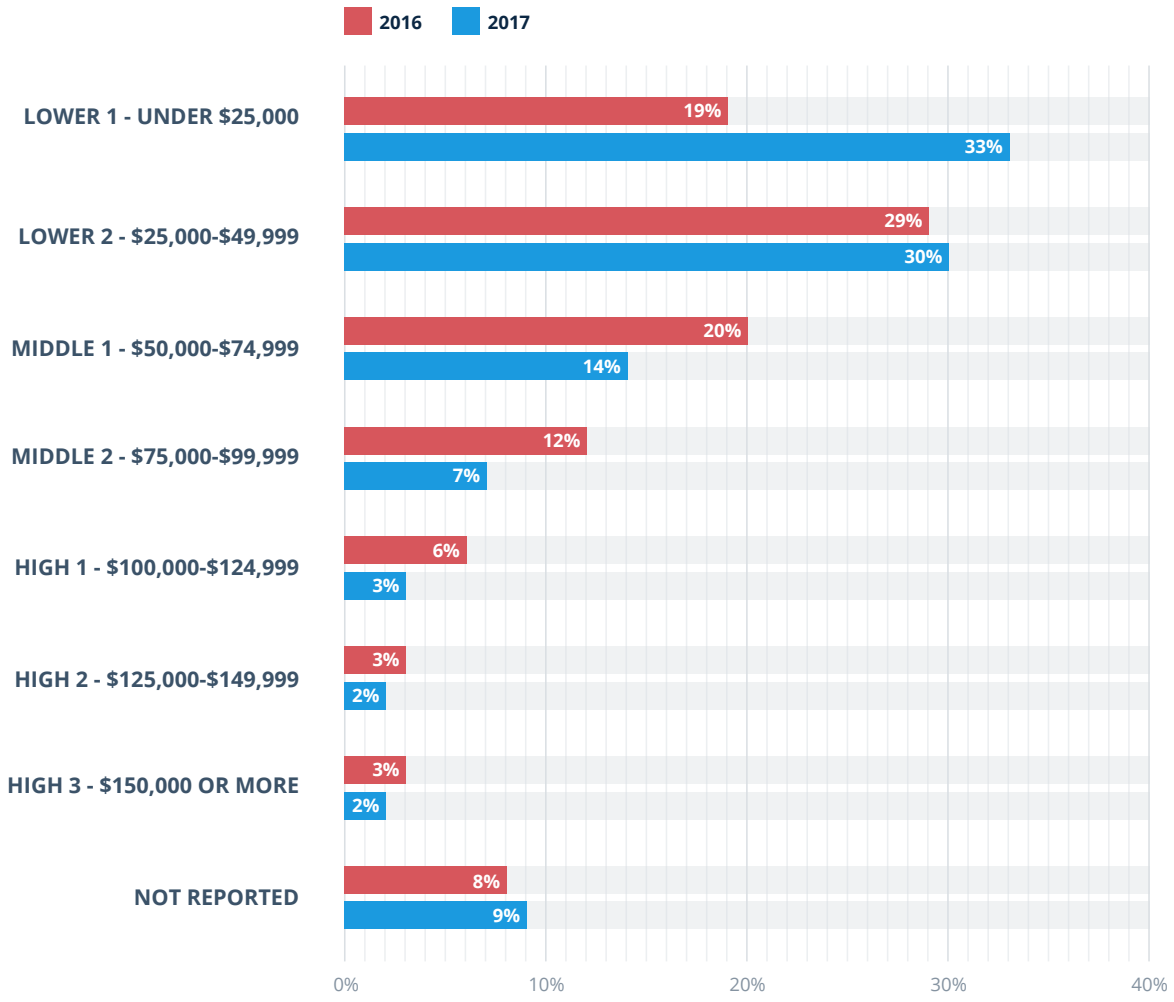
APPENDIX

Race



APPENDIX

Income Level



APPENDIX

Biggest Challenges Students Face - Choosing an Online Program					
		10 OR <	11 - 25	26 - 50	51 OR >
CERTIFICATE	100% ONLINE	84.1%	10.2%	5.7%	-
	BLENDED	94.6%	10.1%	5.3%	1.8%
ASSOCIATE	100% ONLINE	95.5%	4.6%	-	-
	BLENDED	77.4%	18.9%	3.8%	-
BACHELOR'S	100% ONLINE	94.3%	2.3%	2.3%	1.1%
	BLENDED	96.2%	3.4%	-	-
MASTER'S (NON MBA)	100% ONLINE	93.5%	4.3%	-	2.2%
	BLENDED	98.3%	1.69%	-	-
MBA	100% ONLINE	100%	-	-	-
	BLENDED	100%	-	-	-
PROFESSIONAL (JD, ETC.)	100% ONLINE	100%	-	-	-
	BLENDED	100%	-	-	-
PHD AND OTHER DOCTORATE (EDD, PSYD, ETC.)	100% ONLINE	100%	-	-	-
	BLENDED	100%	-	-	-

Note: *Percentages reported in this document have been rounded, resulting in some totals adding up to just under or over 100. Several charts present results for questions in which survey participants could select more than one response.*

APPENDIX

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www.highereducation.com
713-534-1948

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901 5th Avenue, Suite 3220
Seattle, WA 98164
www.bestcolleges.com
contact@bestcolleges.com