



# 2019 Online Education Trends Report.



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# Executive Summary

## Trends in Online Education

- **Career Goals Continue to Drive Enrollment Decisions.** This year, 69% of online students identified employment as their primary goal for entering a program.
- **The “Typical” Online Student is Increasingly Harder to Define.** Demographic shifts were reported related to the ages, locations, and support needs of new online students.
- **The College Campus is Increasingly Part of the Online Experience.** Forty-six percent of online students said they visit campus, either by choice or to fulfill a requirement.

## Online Program Marketing and Recruitment

- **Financial Considerations Interfere with Students’ College Decisions.** For three years in a row, estimating actual costs and finding financial aid topped their list of challenges.
- **New Online Programs Bring Benefits and Challenges.** Seventy percent of administrators said they launch new programs with enrollment growth in mind, while meeting marketing and recruitment goals was their top concern.
- **Student Perceptions of Online Learning Quality and Value Are High.** This year, 77% said distance education is better than or equal to on-campus options, and 88% said their degrees have or will have a positive ROI.

## Online Program Design and Development

- **Demand for Online Learning Remains Steady.** Almost all (99%) of school administrators surveyed said that demand is either increasing or has stayed the same.
- **Keeping Pace With Student Needs Will Be a Continuing Challenge.** As students with more diverse characteristics enter online programs, schools must provide services that meet a wider variety of student needs.
- **Life Happens in Online Education.** This year, 20% of online alumni said unexpected personal events were a major roadblock to graduation. Almost 40% of administrators also identified this as their current students’ biggest challenge, which has implications for support services, student tracking and intervention, and faculty development.

# Introduction

## OUR GOALS

Online education continues to gain popularity. Allen and Seaman (2017) found that of all students taking at least one online class, almost half (48%) are taking only online classes. While most of these online courses and programs are offered by a limited number of schools, new programs are in development at a wide range of colleges and universities (Allen & Seaman, 2017). Increased competition for students means finding a niche, and gaining attention can be challenging.

This fifth annual research project shares feedback from schools and online students. We surveyed school administrators, current and prospective students, and online program alumni. Our findings include trends related to current demand and common motivations for online learning, development strategies for new programs, and student suggestions related to recruitment, marketing, and retention.

## METHODOLOGY

In January and February of 2019, we conducted two online surveys.

The first, delivered using SurveyMonkey, was sent to school administrators representing public and private two- and four-year institutions that currently offer online courses as reported by the Integrated Postsecondary Education Data System. This year, 451 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 was delivered using PollFish, a mobile survey platform, through which we collected responses from 1,500 current, prospective, and former online students who shared feedback about their learning experiences, expectations, and advice for future online students.

## SCHOOL AND STUDENT FEEDBACK

Through the integration of feedback received from our student and school survey participants, current trends were identified and are presented in three overall categories:

- Trends in Online Education
- Online Program Marketing and Recruitment
- Online Program Design and Development

# Trends in Online Education

## EVOLVING STUDENT DEMOGRAPHICS

### Career and Employment Goals Drive Enrollment Decisions

While students choose online learning for a variety of reasons, our findings reveal steady motivations over the past three years related to career and employment goals.

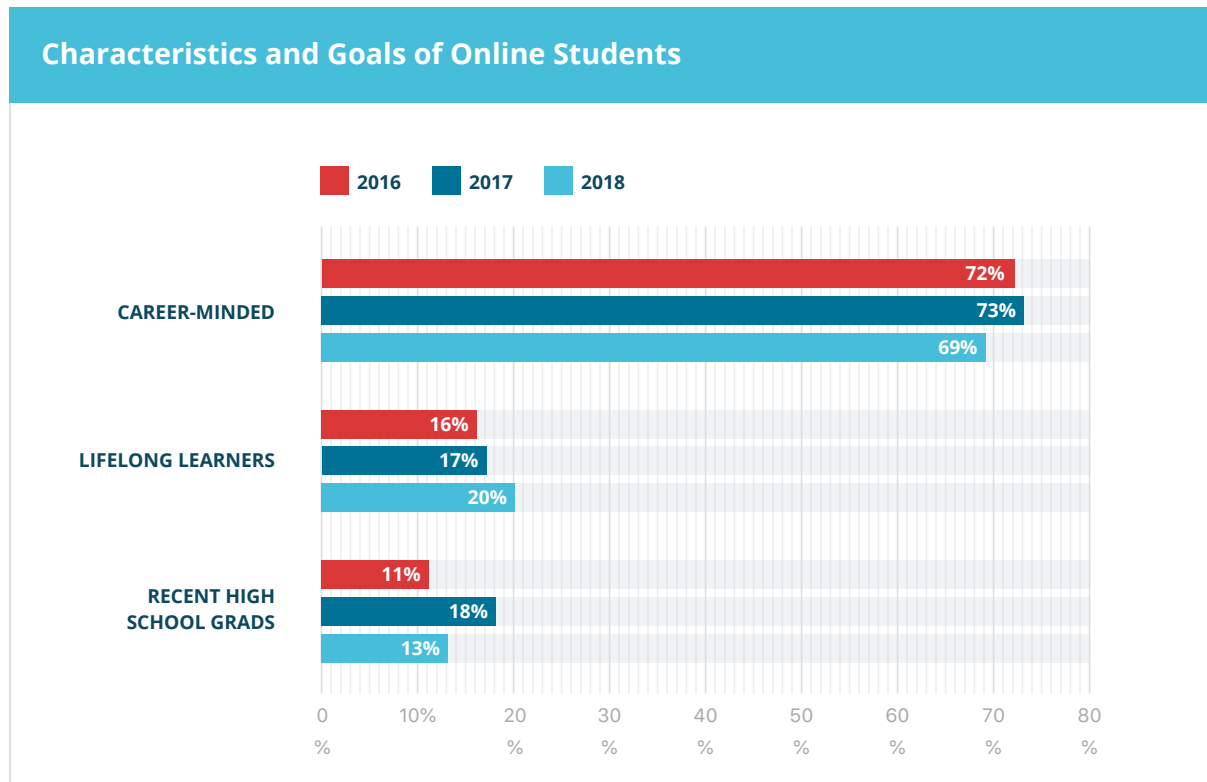
Researchers have identified six categories of students, which extend beyond the age-based labels of traditional and nontraditional, to describe different characteristics and motivations for going to college (Ladd, Reynolds, & Selingo, n.d.).

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

# Trends in Online Education

We used this approach to frame our annual survey, asking students to identify their primary goals for enrolling in an online program and then collapsing the six segments into three major student types: recent high school grads, career-minded students, and lifelong learners. The graphic below shows the breakdown for this year's student participants.

This year, 69% of respondents fell into the career-minded categories (i.e., industry switchers, career accelerators, career starters). This is a slight decrease from the previous two years but still represents a majority.



This year, for the first time, a majority of these career-minded students identified themselves as career accelerators interested in earning an academic credential in a field where they already work or have practical experience.

# Trends in Online Education



BEST COLLEGES INSIGHT

## Employment Outcomes are Important to Prospective Students

It may be no surprise that online students are focused on career goals. This year, almost 80% of school administrators said that prospective students are asking about placement and employment rates of graduates. How is your institution targeting recruitment efforts to these students, and what support services are available after they enroll? What about after they graduate?

### ONLINE LEARNERS ARE INCREASINGLY DIVERSE

We asked online program administrators to share “the most significant trend in online student demographics” at their institutions. Last year’s results revealed a trend toward younger learners, including dual-enrollment students who were still in high school. The responses this year show continued trends related to student age and a wider range of diversity in other areas.

#### Age

Are students getting older or younger? Responses suggest both, with 37% of administrators reporting a trend toward older (i.e., adult) learners and 28% reporting a trend in younger learners. One administrator shared that “In the past, we have seen a major shift from older to younger students. Now we are seeing more of a balance in traditional students and adult learners who are returning to school.”



# Trends in Online Education

## Location

This year, 16% of responsive schools shared that varying location is a trend in enrollment. This includes students enrolling from outside the U.S., from out of state or at greater distances from campus than previously seen, and from the local area. Of these, the local trend seems strongest, with statements from administrators like, “The majority of the online students are from the hyperlocal area ... show[ing] us that they could attend campus, but opt not to” and “Resident students are taking online courses to supplement course schedules and reduce time to graduation. Reducing the time to degree completion is a recurring theme.”

## Race, Class, Language, and Disabilities

This year, several schools noted a wide variety of student populations entering their online programs in increased numbers. These include more students with disabilities, learners for whom English is a second language, underrepresented minorities, and economically disadvantaged students.



BEST COLLEGES INSIGHT

## One Size May Not Fit All When Supporting Online Students

How is your school serving the diverse needs of students enrolled in online courses? How do schools prepare faculty for online classrooms that potentially include high school, dual-enrollment students and working professionals in addition to traditional learners who are all enrolled across a wide array of time zones and need a variety of support services?

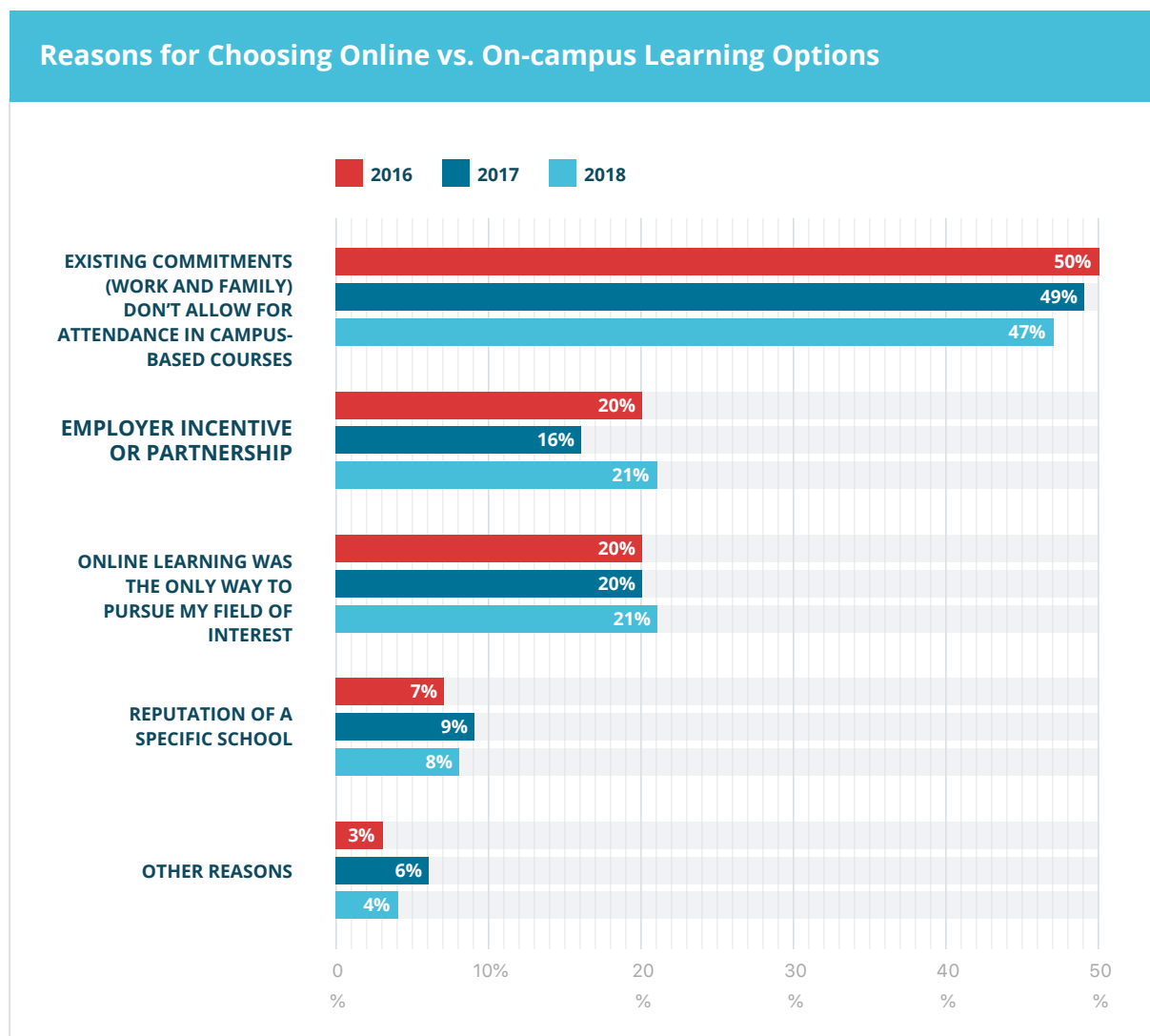


# Trends in Online Education

## ONLINE VS. ON CAMPUS

Why do students choose to learn online rather than on campus? For the third year in a row, the convenience and flexibility offered by online programs topped the list of reasons. More than half (59%) of students surveyed have children, and half reported that they are employed.

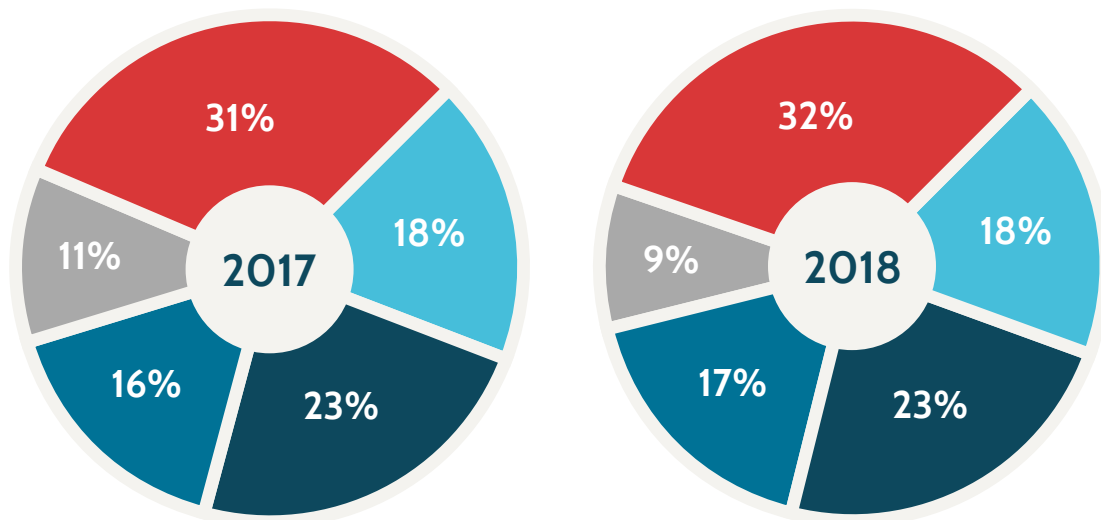
Students shared additional reasons for choosing an online format, which included a range of transportation issues, challenges related to having a disability, and a desire to attend a course or program that was only offered online.



Are online students concerned about choosing online learning instead of on-campus options? For the second year, almost one-third (32%) reported no concerns. For those who did report concerns, the “quality of instruction and academic support” topped the list.

# Trends in Online Education

## Concerns About Choosing Online vs. On-Campus Education

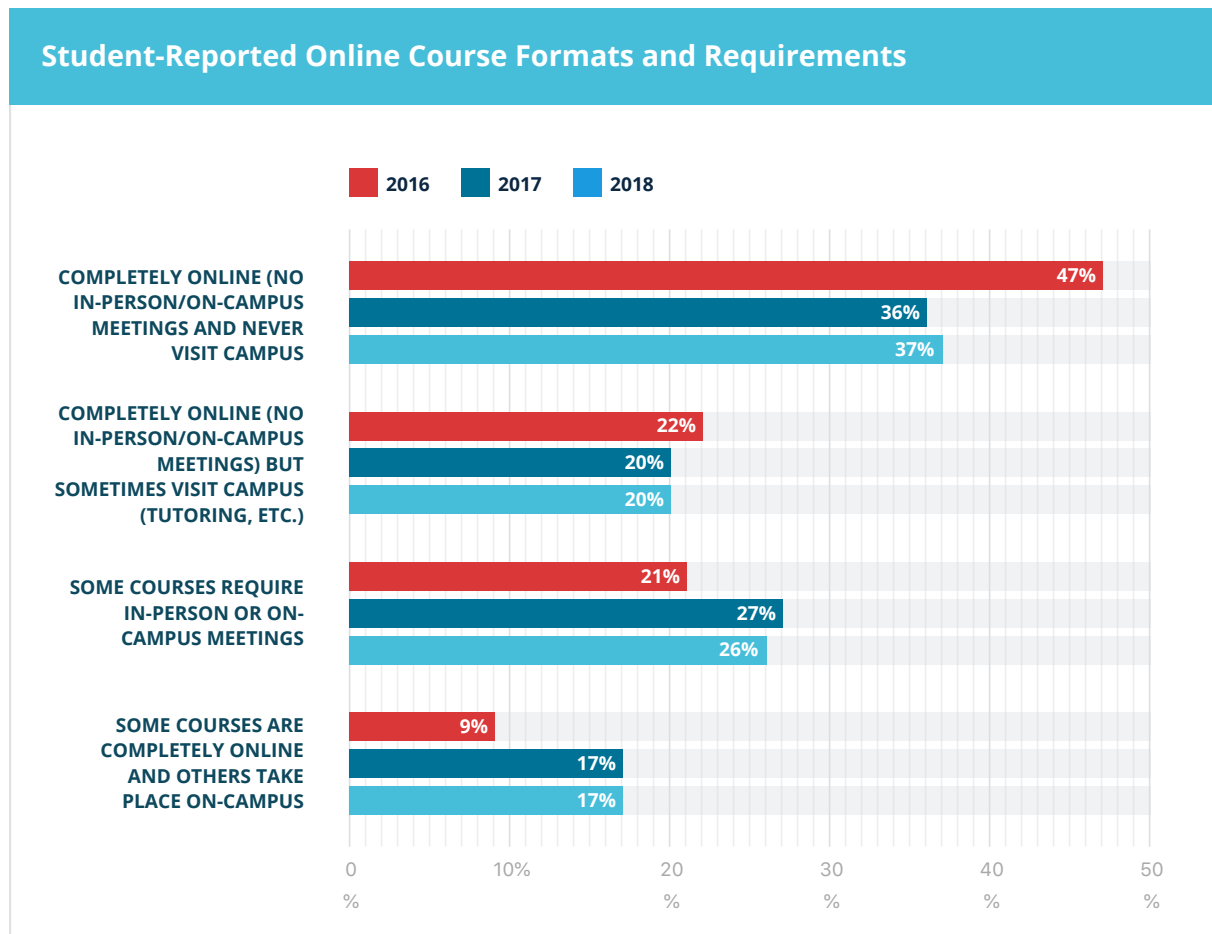


## THE ONLINE LEARNING EXPERIENCE

### On-Campus Requirements

Almost two-thirds (63%) of students who are currently enrolled in an online degree or certificate program reported that they visit a campus location either by choice or because their program has an in-person requirement.

# Trends in Online Education

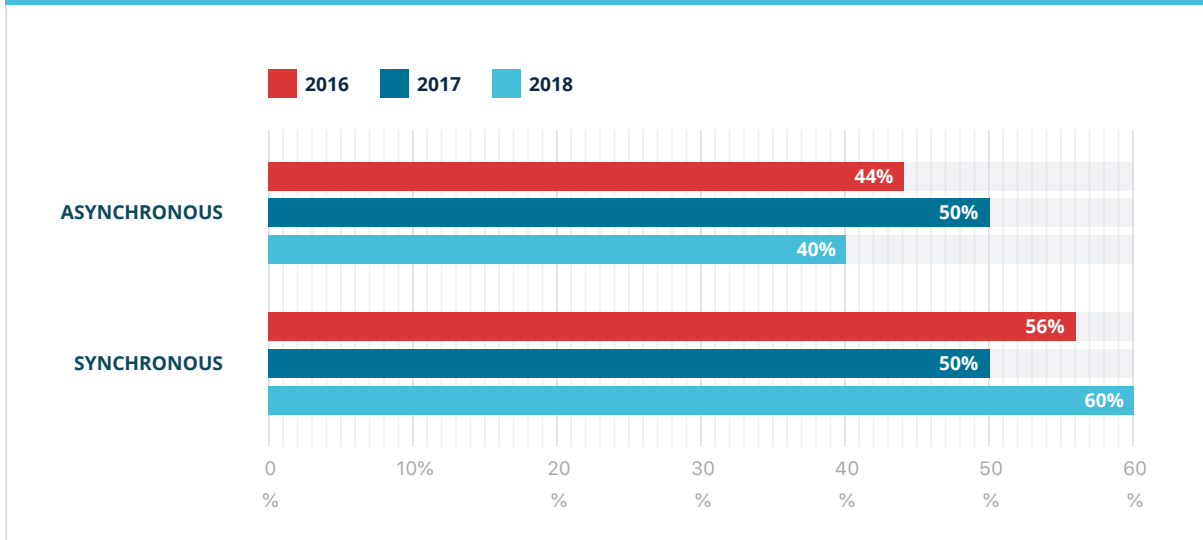


## Synchronous vs. Asynchronous

This year, we saw an increase in the number of currently enrolled students reporting synchronous components in their online courses (i.e., learners must attend live, scheduled class meetings).

# Trends in Online Education

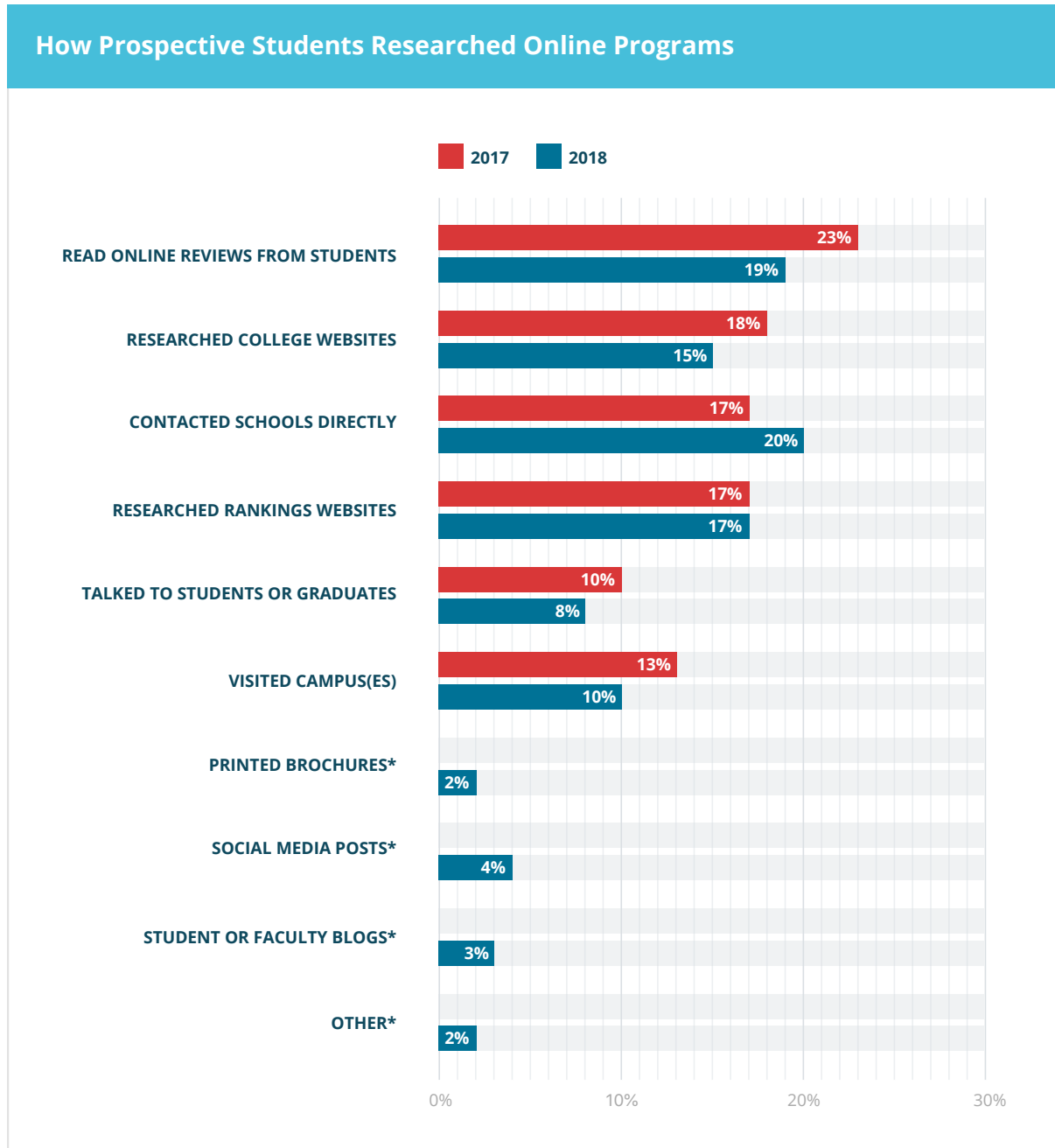
## Student-Reported Use of Asynchronous and Synchronous Communication in Online Courses



# Online Program Marketing and Recruitment

## HOW DO ONLINE STUDENTS CHOOSE A PROGRAM?

This year, participants who graduated from online programs shared that they primarily “contacted schools directly (e.g., email, texts, phone calls).” Other popular research methods were “reading online reviews from students (on sites such as Cappex, GradReports, Unigo)” and “researching rankings websites.”



\* NEW CATEGORIES IN 2018

# Online Program Marketing and Recruitment

In addition to the options we provided, some students added that their research was narrowed by schools that their employers were already working with or recommended. Others indicated that they enrolled in online options at schools where they were already taking classes. Referrals from friends and/or family also had an impact on students' decisions.

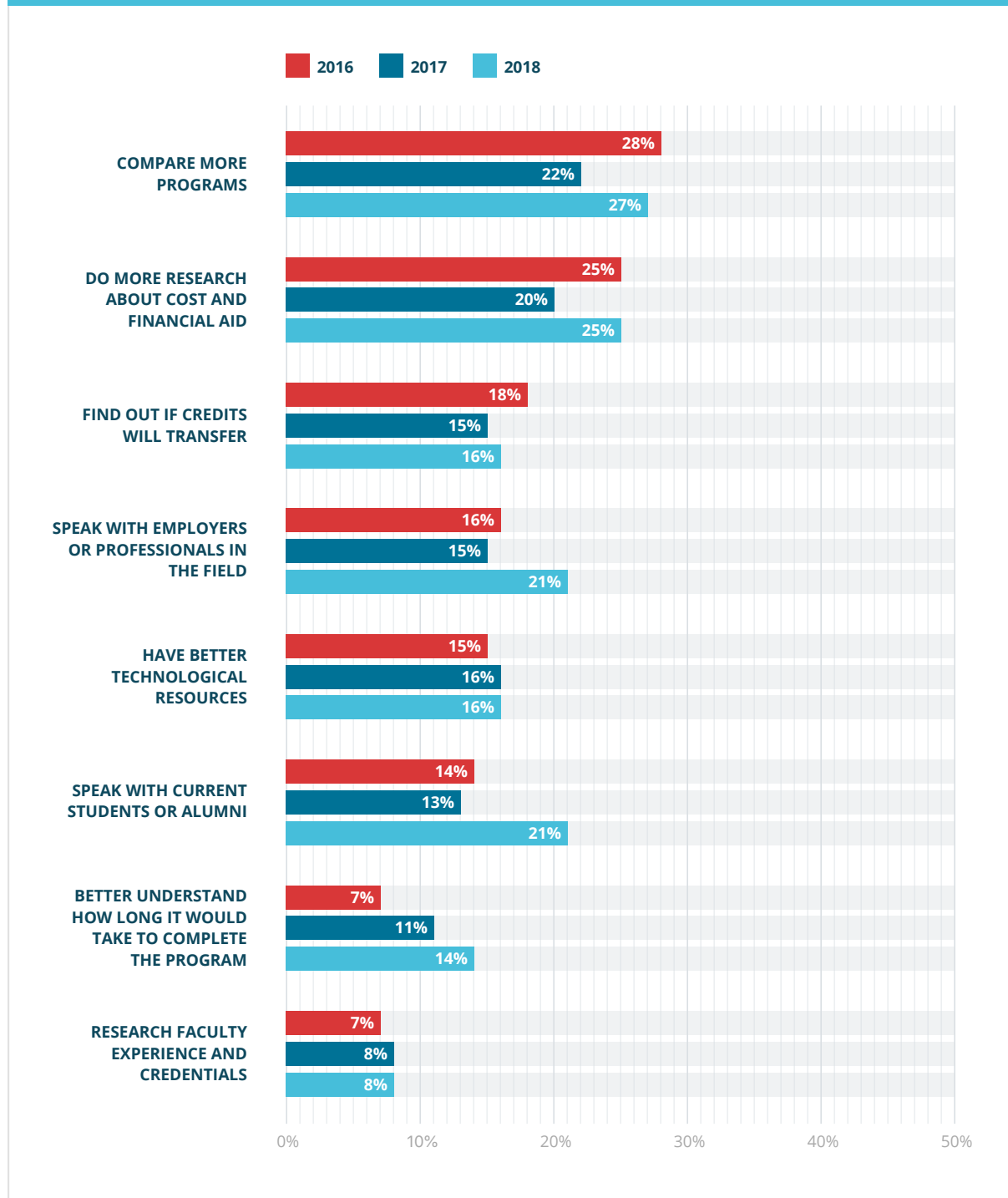
## **ADVICE FROM ONLINE ALUMNI**

Online program graduates have an interesting perspective that leads to relevant advice for new students and those thinking about online learning options. What lessons did online alumni learn from their experiences?

For the third year in a row, alumni said they would “compare more programs” and “do more research about cost and financial aid.” This year, we also saw an increase in the number of online alumni who wish they had spoken to more people before enrolling, including employers or professionals in the field and current students or alumni.

# Online Program Marketing and Recruitment

## What Graduates Would Do Differently Before Choosing an Online Program



What are the biggest challenges students face when deciding on an online program? In all three years of our data collection, the top two responses have been “estimating actual costs” and “applying for financial aid and identifying sufficient funding sources.”



# Online Program Marketing and Recruitment

<b>Biggest Challenges Students Face When Choosing an Online Program</b>			
	2016	2017	2018
<b>Estimating actual costs (tuition, books, etc.)</b>	<b>#1</b>	<b>#1</b>	<b>#1</b>
<b>Applying for financial aid and identifying sufficient funding sources</b>	<b>#2</b>	<b>#2</b>	<b>#2</b>
<b>Finding a program that meets my needs and interests</b>	<b>#6</b>	<b>#3</b>	<b>#3</b>
<b>Finding sufficient information about academic requirements</b>	<b>#3</b>	<b>#5</b>	<b>#4</b>
<b>Finding information about how graduates fared in the job market</b>	<b>#5</b>	<b>#4</b>	<b>#5</b>
<b>Contacting a real person to ask detailed questions about specific programs</b>	<b>#4</b>	<b>#6</b>	<b>#6</b>

# Online Program Marketing and Recruitment



BEST COLLEGES INSIGHT

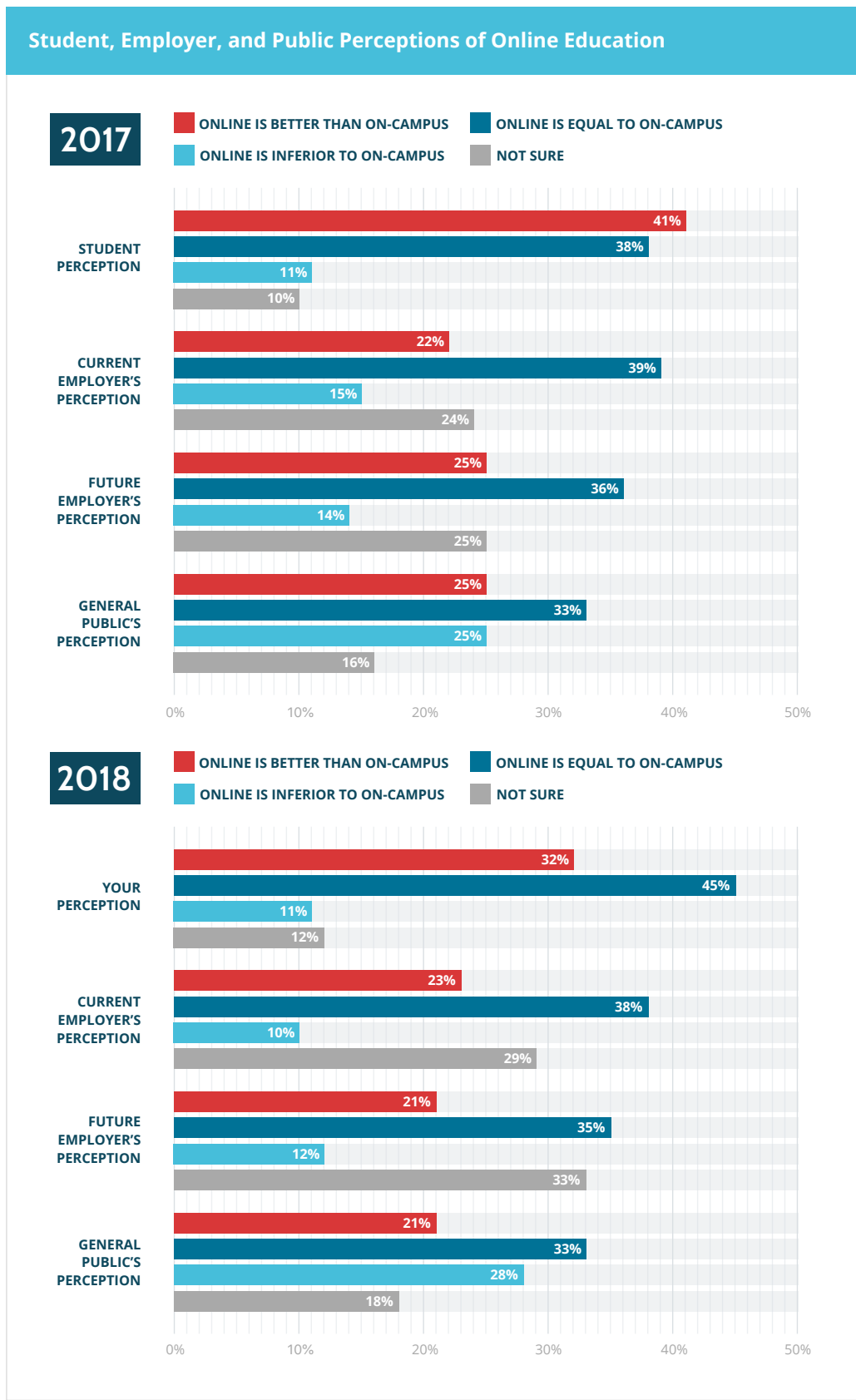
## How Can Schools Help Students Identify “Good-Fit” Programs?

This year, 68% of school administrators shared that “marketing and meeting recruitment goals” was their biggest challenge related to offering new online programs. Lessons learned by online program alumni include the need to compare more programs and better understand the financial aspects of their college decision. Students use a variety of methods to learn about online programs and usually use more than one resource. How is your institution leveraging these resources?

### PERCEPTIONS OF ONLINE EDUCATION

For the past two years, we’ve included questions about perceptions of online education in our student survey. Do learners think online education is better than, equal to, or inferior to on-campus education? Responses indicate that a majority of students feel that online learning is “better than” or “equal to” on-campus learning. When asked about their employers’ perceptions, the results are similar, although more students were “unsure” this year.

# Online Program Marketing and Recruitment



# Online Program Marketing and Recruitment



BEST COLLEGES INSIGHT

## Connect Prospective Applicants with Current Students, Alumni, and Employers

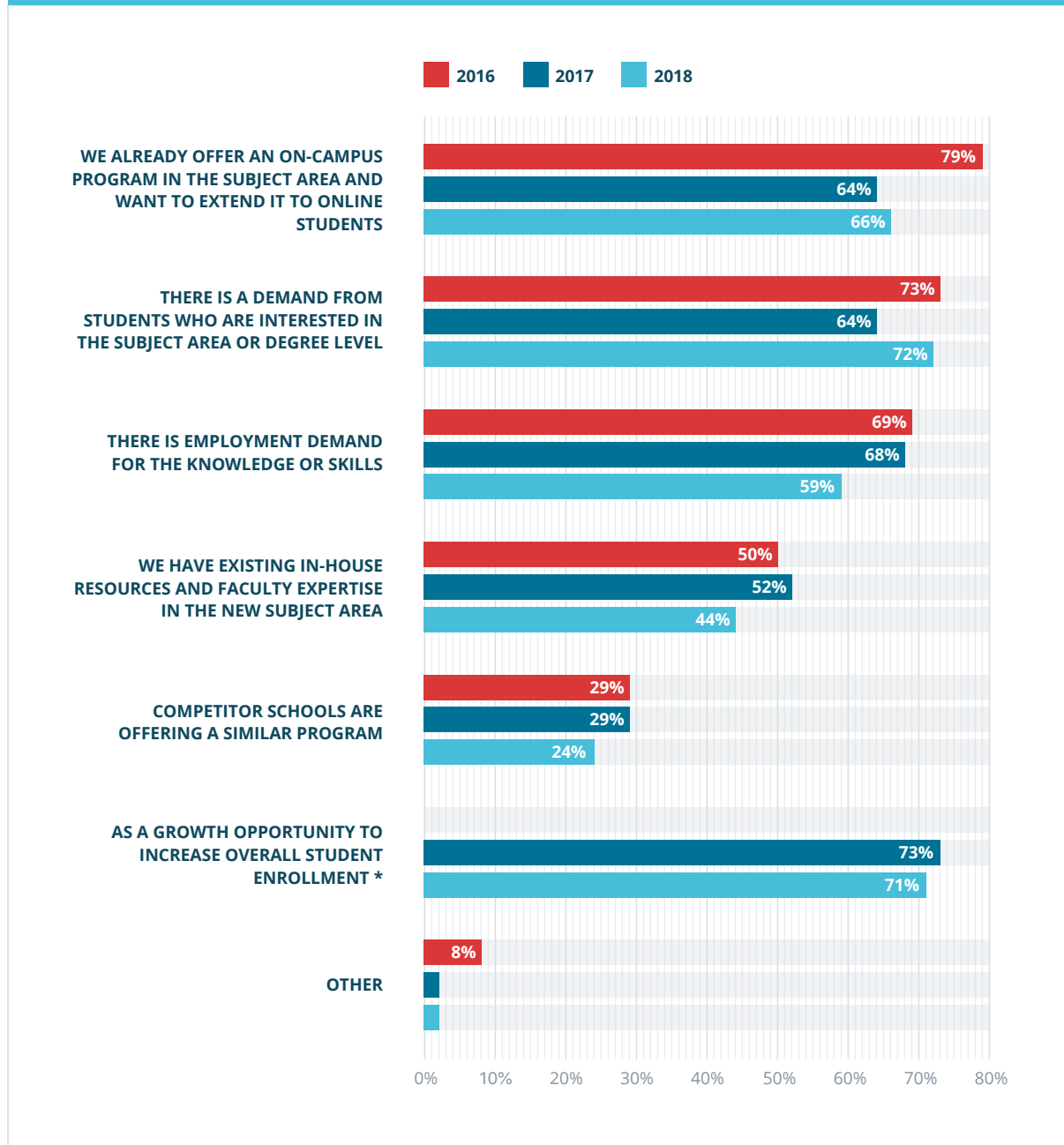
Alumni also shared some regrets about not talking to more people before enrolling in their online programs. Are there ways to connect prospective students with current students and alumni at your institution? Employer partnerships may be beneficial before, during, and after enrollment to sustain conversations about career outlook, employment opportunities, and relevant academic work.

### LAUNCHING NEW PROGRAMS

Our school survey provided some insight into how institutions make the decision to offer a new online program and challenges to implementation. This year's primary factors were related to student demand (73%) and the opportunity for increased enrollment growth often found through online programs (70%).

# Online Program Marketing and Recruitment

## What Are the Primary Factors in a School's Decision to Offer a New Online Program?

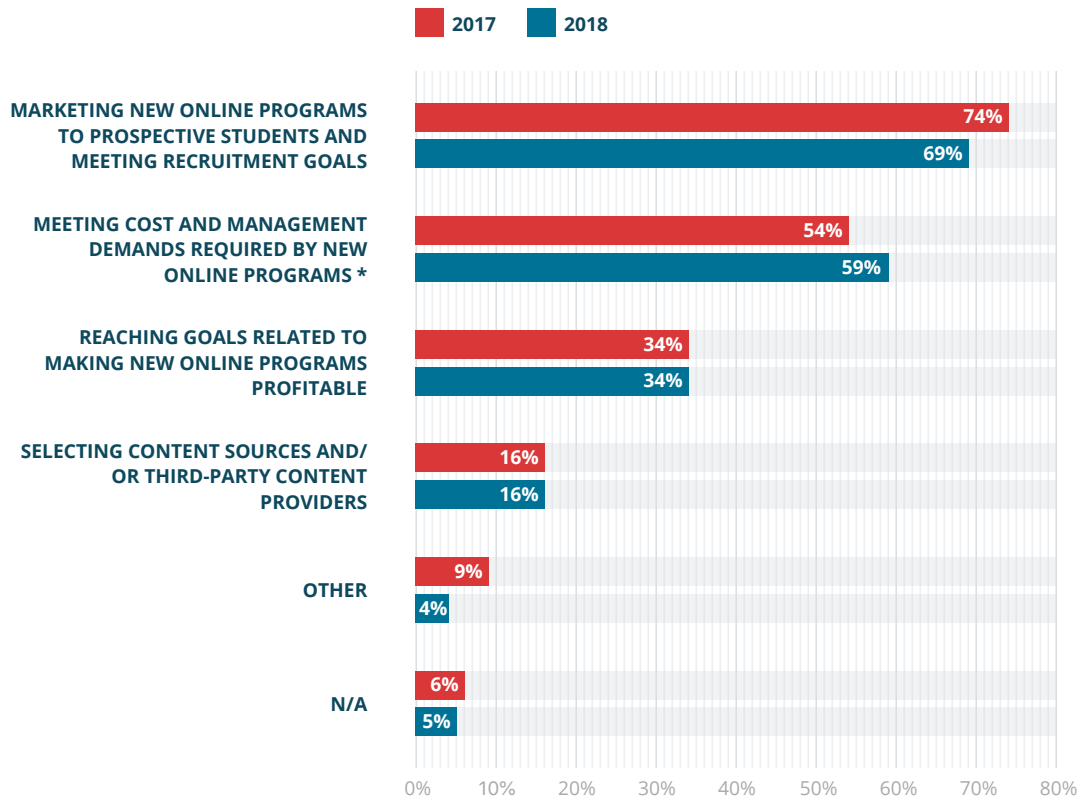


\* NEW OPTION BEGINNING IN 2017

Deciding to offer a new program is just the first step, however. Our school survey respondents identified marketing and recruitment goals and meeting cost and management demands as the top challenges two years in a row.

# Online Program Marketing and Recruitment

## Biggest Challenges Schools Face When Offering Online Programs



\* E.G., FACULTY TRAINING, TECHNOLOGY INFRASTRUCTURE, HELP DESK, ADMINISTRATIVE FUNCTIONS)

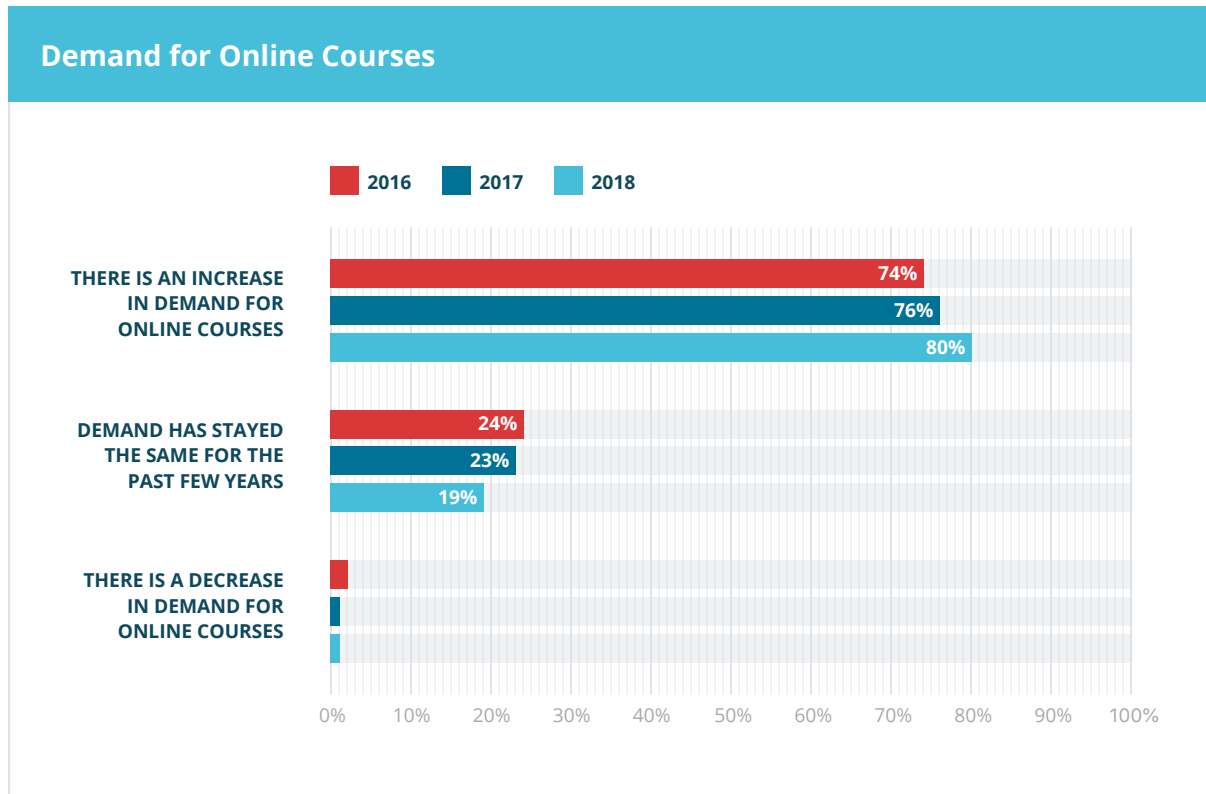
The “other” challenges reported by online program administrators this year include:

- resistance (on campus) to the use of and investment in technology required to support online programs, faculty, and students;
- ensuring content quality is equal in online and on-campus classrooms; and
- higher expectations for connectivity and interactivity of online education.

# Online Program Design and Development

## PROGRAM DEMAND AND BUDGETS

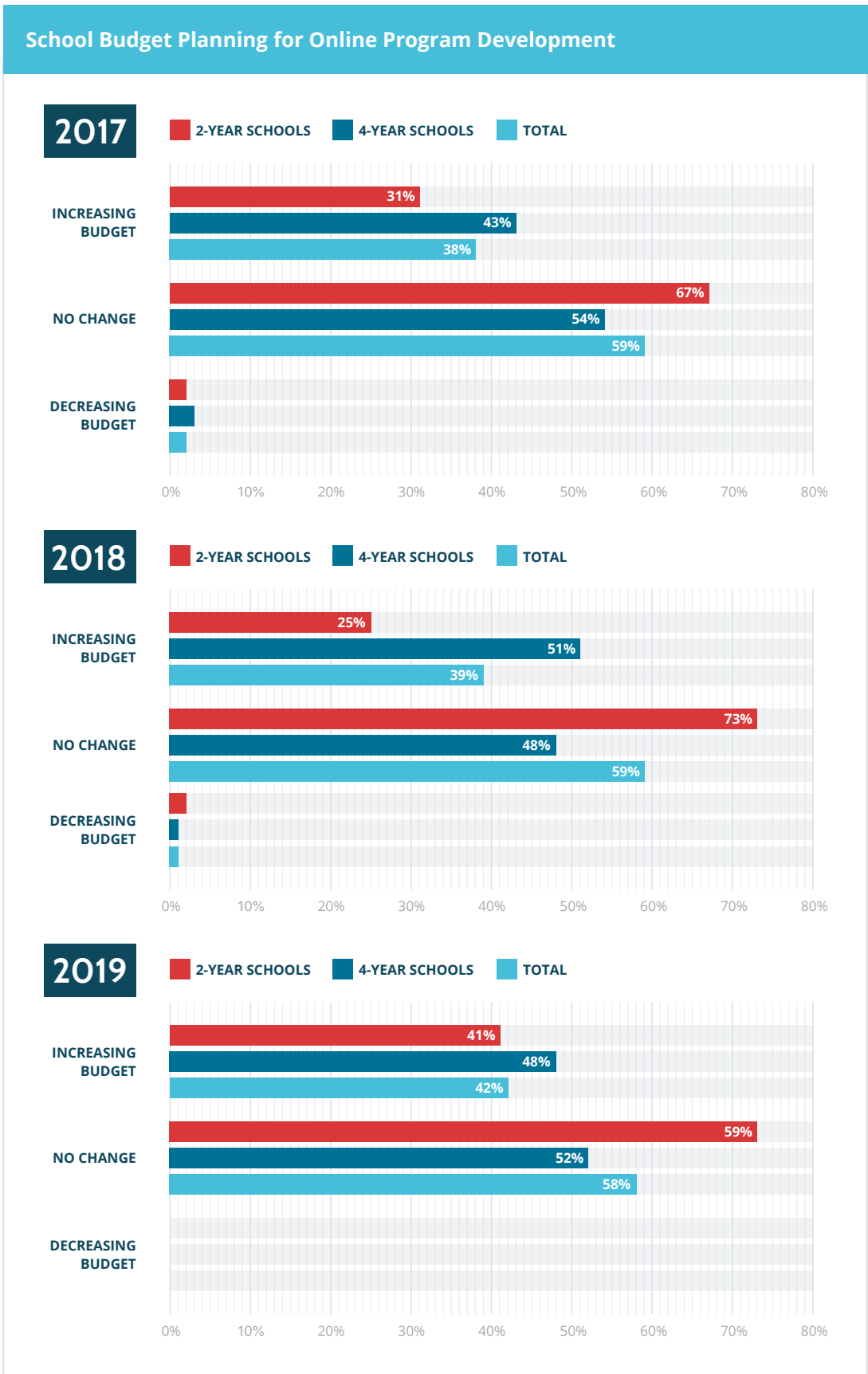
What is the demand for online programs in the higher education industry? In each of the past three years, the majority of school administrators have said that the demand has increased compared to the previous year. And nearly all (99%) report that it's either increasing or has stayed the same.



Anticipated increased demand doesn't necessarily mean an increased budget. A little more than half of the colleges that completed our survey (58%) do not anticipate any change in their current budgets this year, which is similar to the responses received during the previous two years. We also see more two-year schools increasing their budgets this year than in the past two years.

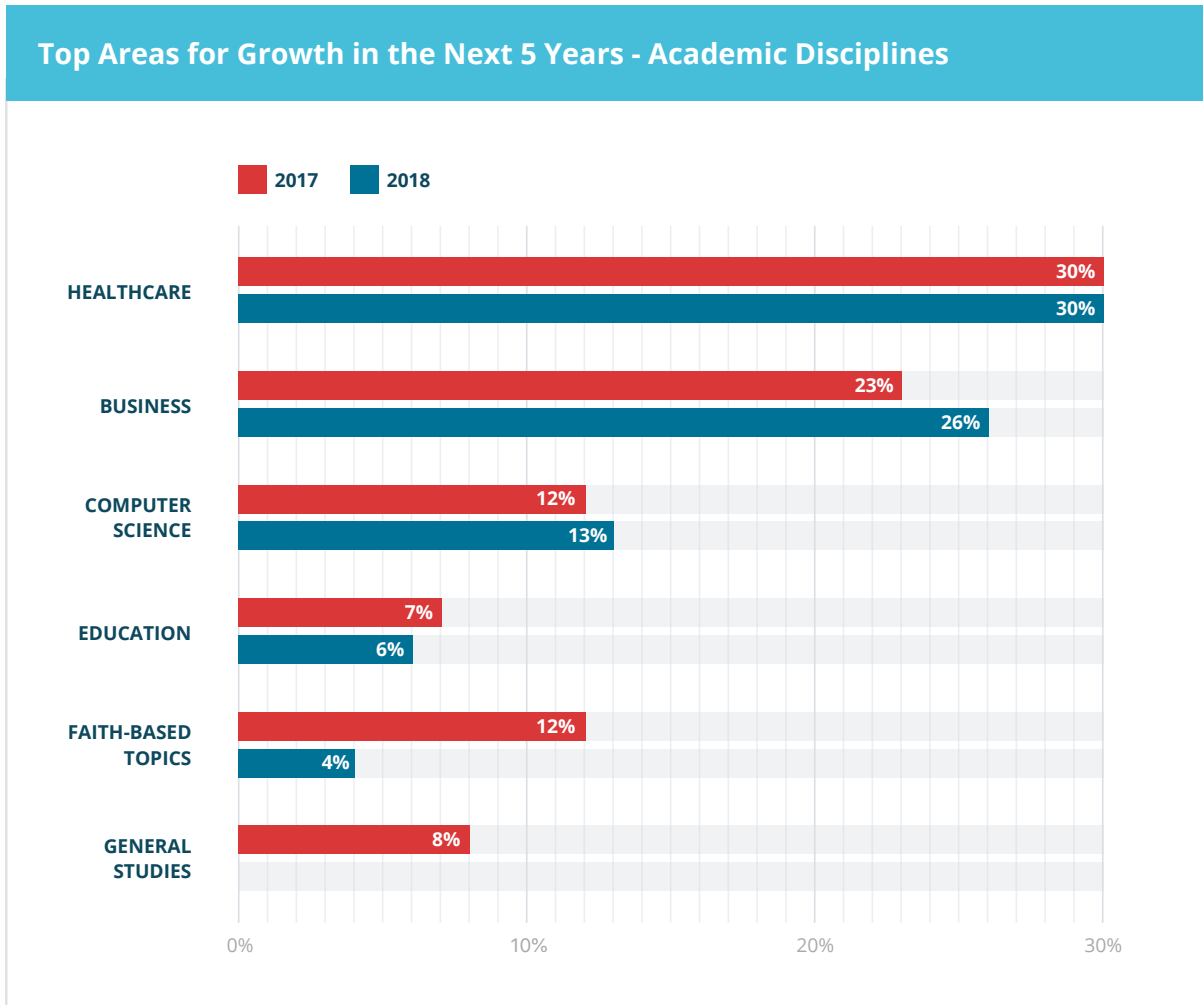


# Online Program Design and Development



# Online Program Design and Development

School administrators' predictions about which programs will grow have remained fairly steady for the past two years. They are seeing opportunity for programs in healthcare, business, and computer science fields.

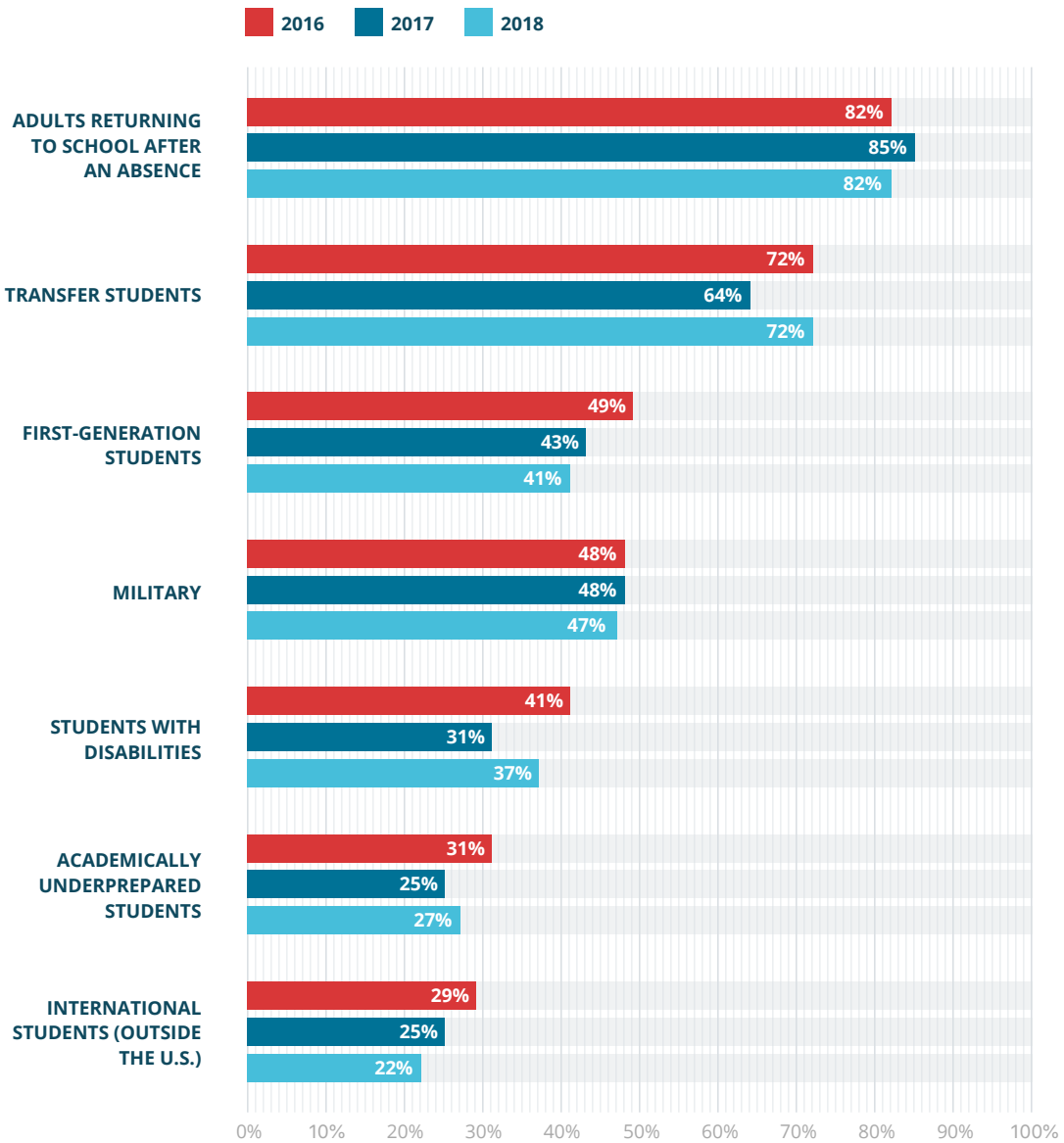


## SERVING DIVERSE STUDENT POPULATIONS

Today's online students bring a variety of experiences, preferences, and needs to their classrooms. A majority of schools consider specific student characteristics when designing new online programs. That trend has continued since we started this study in 2016.

# Online Program Design and Development

## Online Program Design for Student Population Characteristics



# Online Program Design and Development



BEST COLLEGES INSIGHT

## Is Your School Anticipating Current and Future Student Needs?

This may be one of the most significant challenges ahead. As student populations include a wider range of student characteristics, the need for support -- for both students and faculty members -- will increase. However, administrators might not always be mindful of these increasingly diverse student populations; for example, although some school administrators have seen an increase in international students over the past two years, program creation accounting for this group seems to be decreasing.

### REMOVING ROADBLOCKS TO GRADUATION

Our online student alumni participants provided some insight into the challenges they faced while completing their programs. Perhaps not surprisingly, the top issue was “paying for higher education while minimizing debt,” followed by “unexpected circumstances or events in my personal life.”

# Online Program Design and Development



BEST COLLEGES INSIGHT

## What Are the Roadblocks to Reaching Graduation in Your Online Programs?

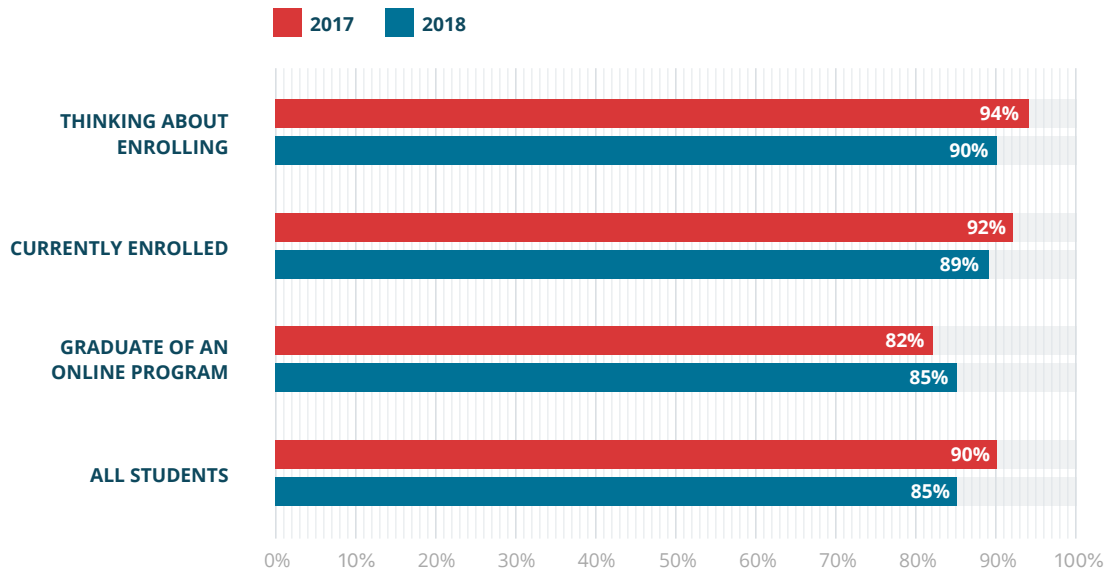
Online students are busy students, often juggling school, work, and family responsibilities. This year, almost 40% of school administrators also identified unexpected circumstances as their students' biggest challenge. Early conversations about why students are getting behind and connecting them with resources to get back on track (e.g., financial advising, personal counseling) are critical steps for success.

### STUDENT SATISFACTION

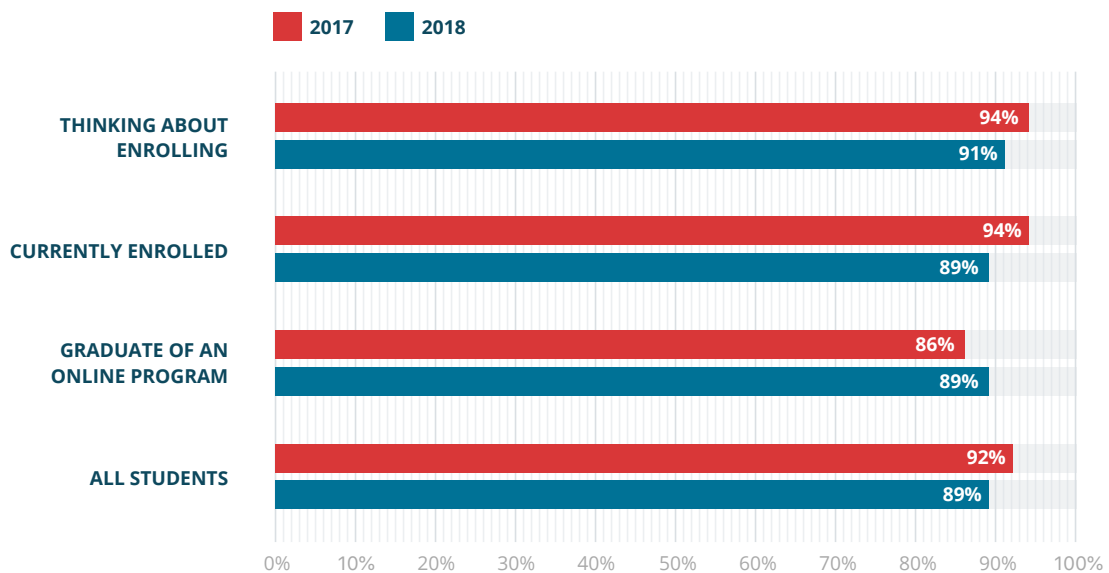
This year, we looked at student satisfaction through the lenses of return on investment and willingness to recommend to others. Overall, the responses this year were favorable, with 88% of students saying they have seen or will see a positive ROI, and 89% saying they would recommend online education. However, these numbers show a slight drop from last year.

# Online Program Design and Development

## My Online Degree Has or Will Have a Positive ROI



## I Would Recommend Online Education to Others



# Online Program Design and Development

In both years that our study has included this subject, we have seen a slight decrease in satisfaction across the student journey from those thinking about enrolling to those who have graduated from an online program. While the perception of value remains overwhelmingly high, there may be some impact on students' willingness to recommend from the financial concerns they are also reporting, depending on where they are in their programs and loan repayment.



# Conclusion

For those considering pursuing a certificate or degree online, there are more options to choose from than ever, and new programs continue to be offered. What can your school do to meet the needs of those who are looking for online learning opportunities? And what can you do to better support these students not only after they enroll, but also after they graduate?

## Online Students Bring Diverse Needs to the Online Classroom

- The “typical” online student may be a thing of the past as students of all ages and from all locations enroll in increasing numbers. Explore the range of characteristics and needs among students at your institution and identify the services that will support their success.

## Help Prospective Students Find Best-Fit Programs

- Leverage multiple avenues of communication to not only meet your marketing and recruitment goals, but also to help prospective students choose the programs that will meet their needs. Share details that help them estimate actual costs and set realistic expectations for learning as an online student.

## Students Need Career Development Support Throughout Their Journey

- Take a closer look at how you are recruiting career-minded learners -- the majority of online students -- and how you are supporting them after they enroll. Career services, internships, professional networking, employer partnerships, and career-oriented curricula are as important as ever, from recruiting to graduation and beyond.

## Challenges Related to Paying for College and Managing Student Debt are Ongoing

- Financial support doesn't end for students after a financial package is offered and accepted. Prepare new students for what they can expect in terms of college costs and financial assistance. Also, teach them the skills they need to monitor (and potentially reapply for) financial assistance throughout their programs and anticipate loan repayment after graduation.

## Online Students Value Their Learning Experience

- Overall satisfaction with online learning seems high. Seek out feedback from your online students and graduates for insights about their satisfaction with the online learning experience and the perceived value of completing their programs.

# Appendices

## CONTRIBUTORS



### About Melissa Venable

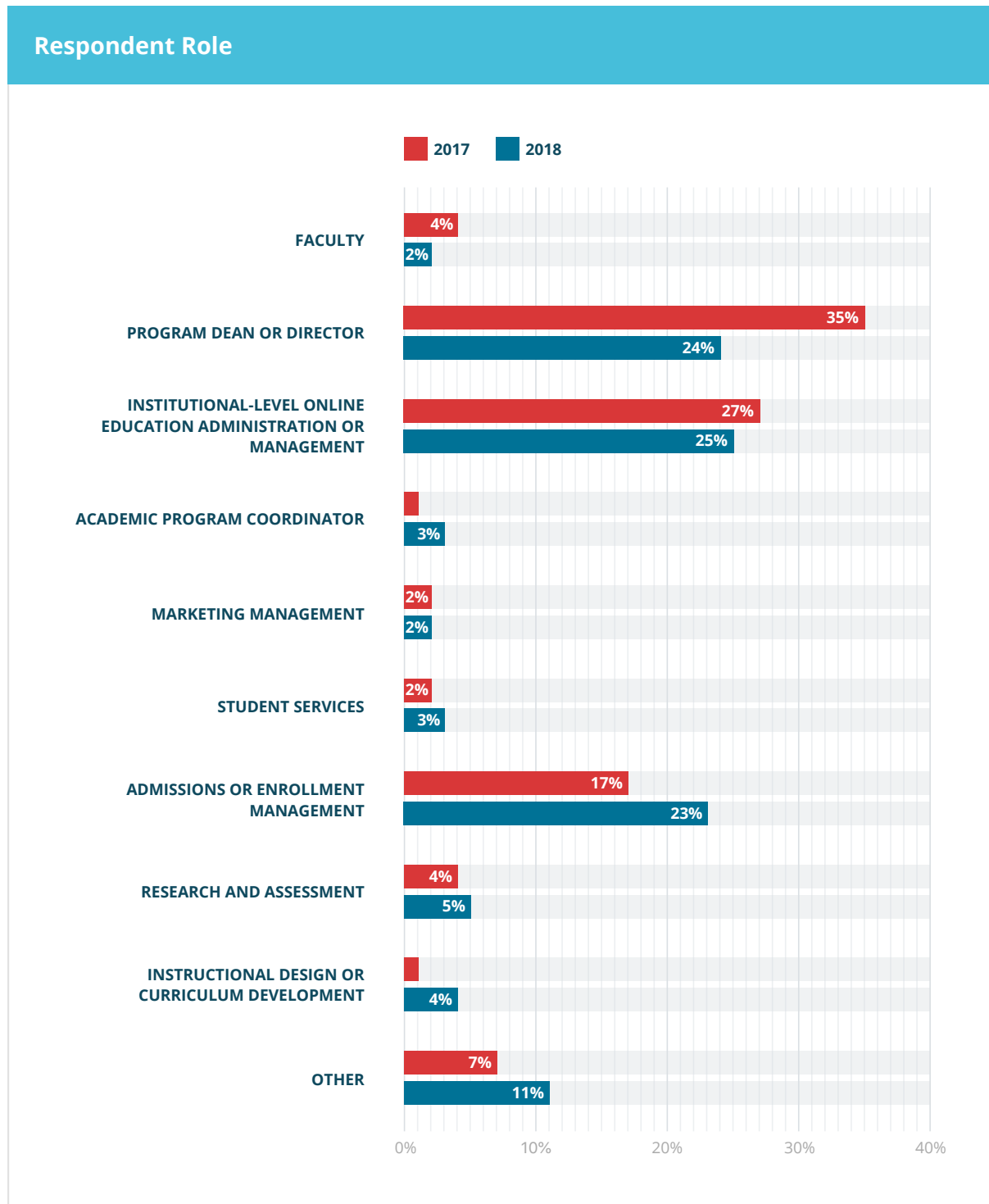
Online Education Advisor

Dr. Melissa Venable has served as an online education advisor and writer at BestColleges 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 roles in higher education throughout her career including curriculum manager, instructional designer, career development coordinator, and academic advisor.

## ABOUT BESTCOLLEGES

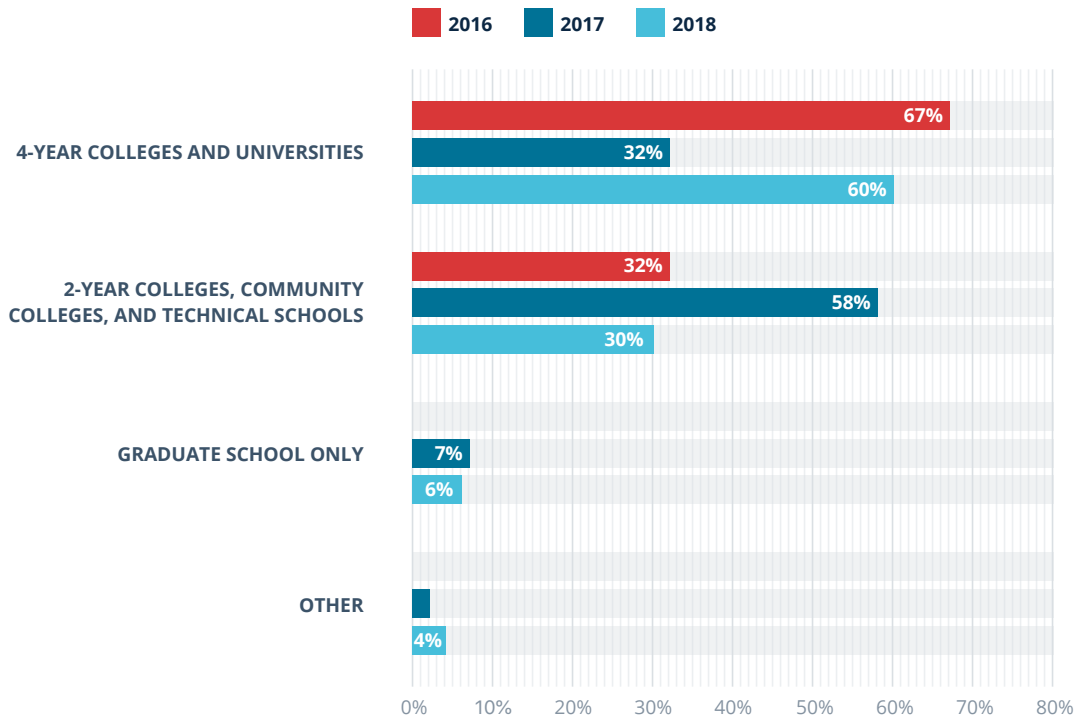
BestColleges empowers students to make smarter educational decisions and find schools that best fit their needs through proprietary research, user-friendly guides, and hundreds of unique college rankings. As a trusted education advisor, they also provide a wide array of college planning, financial aid, and career resources to help students realize life goals and overcome educational challenges as they prepare for careers after college.

# Appendices

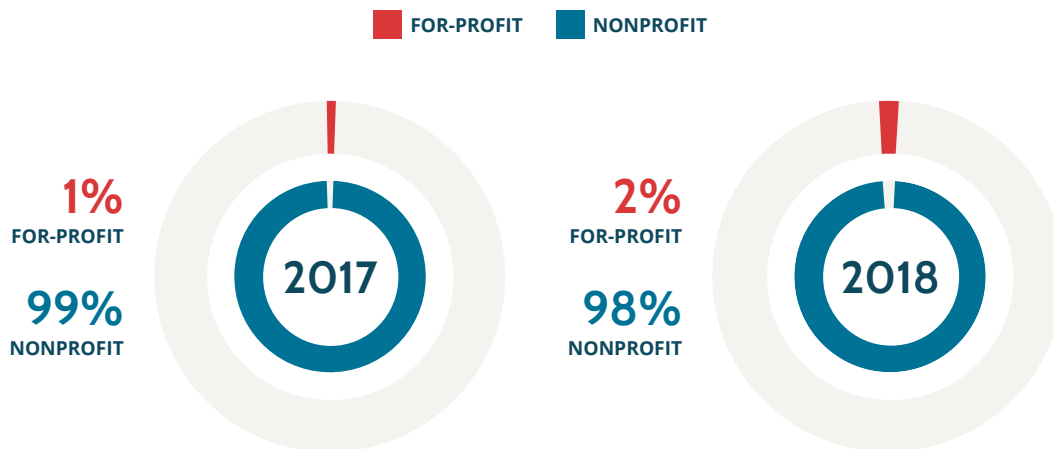


# Appendices

## Institutional Classification

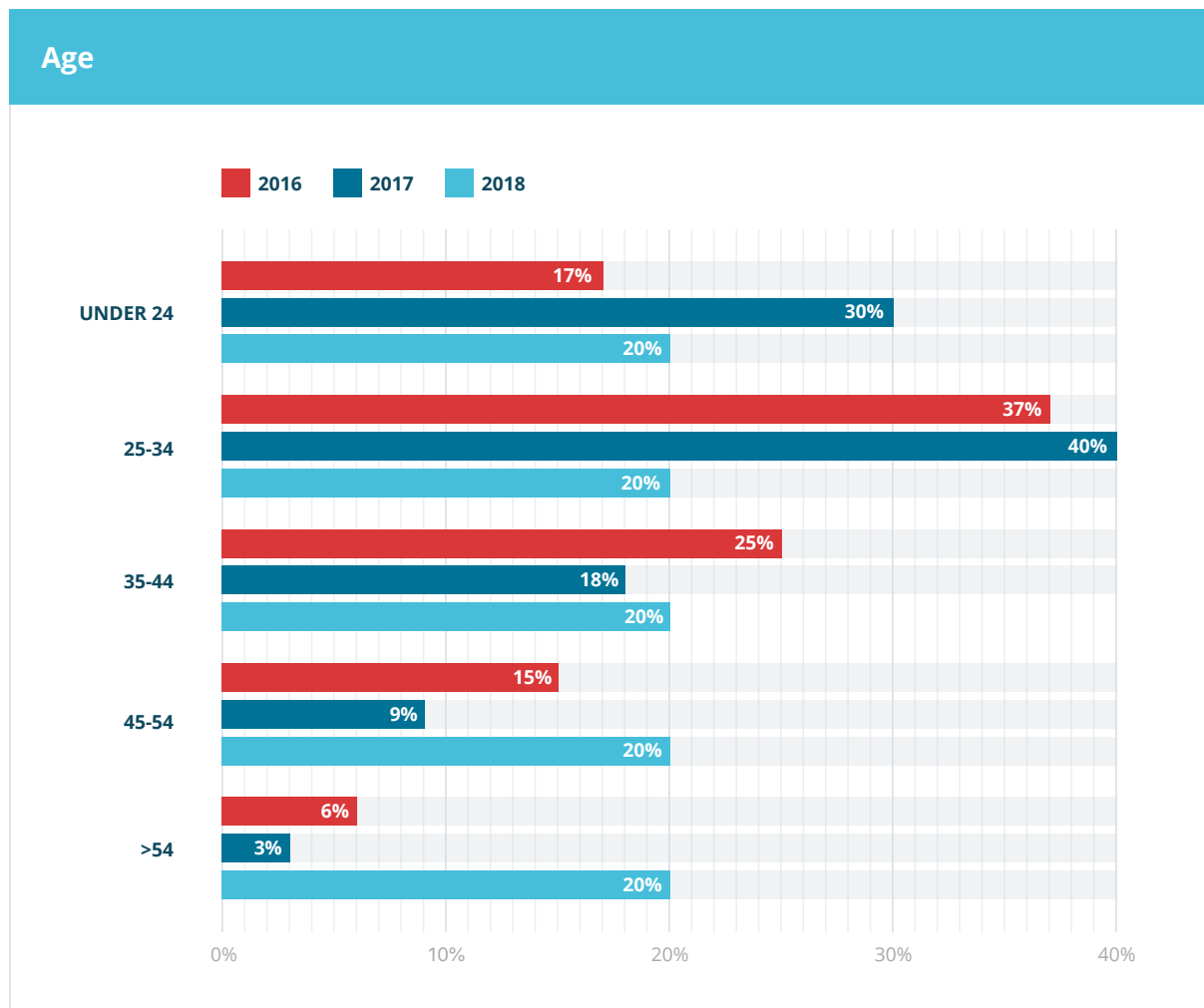
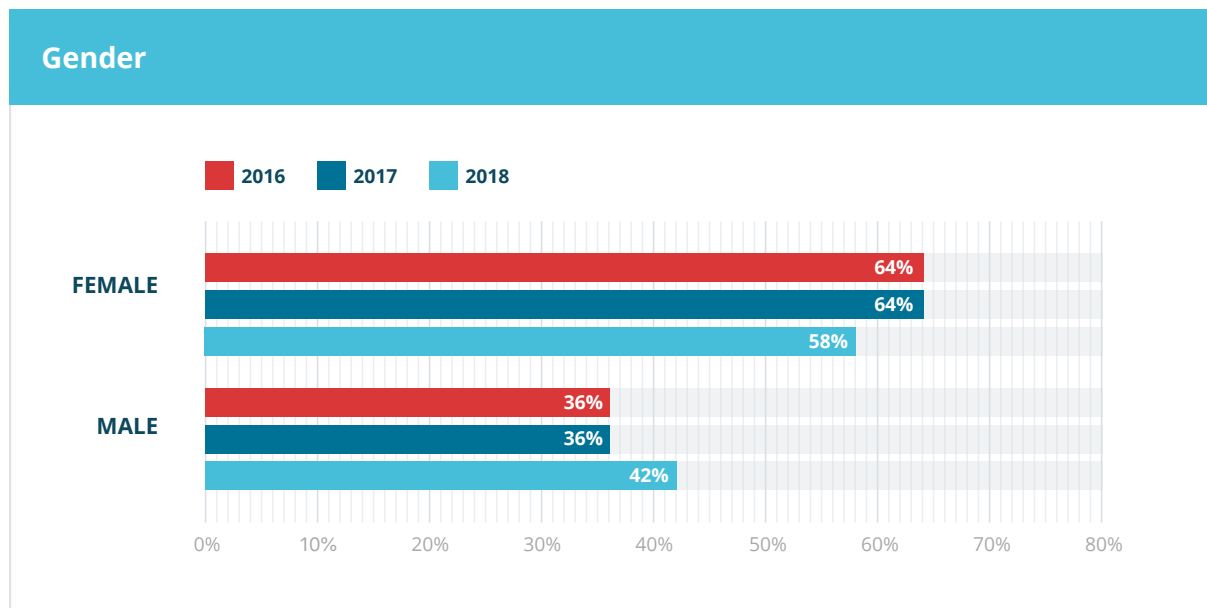


## Institutional Type

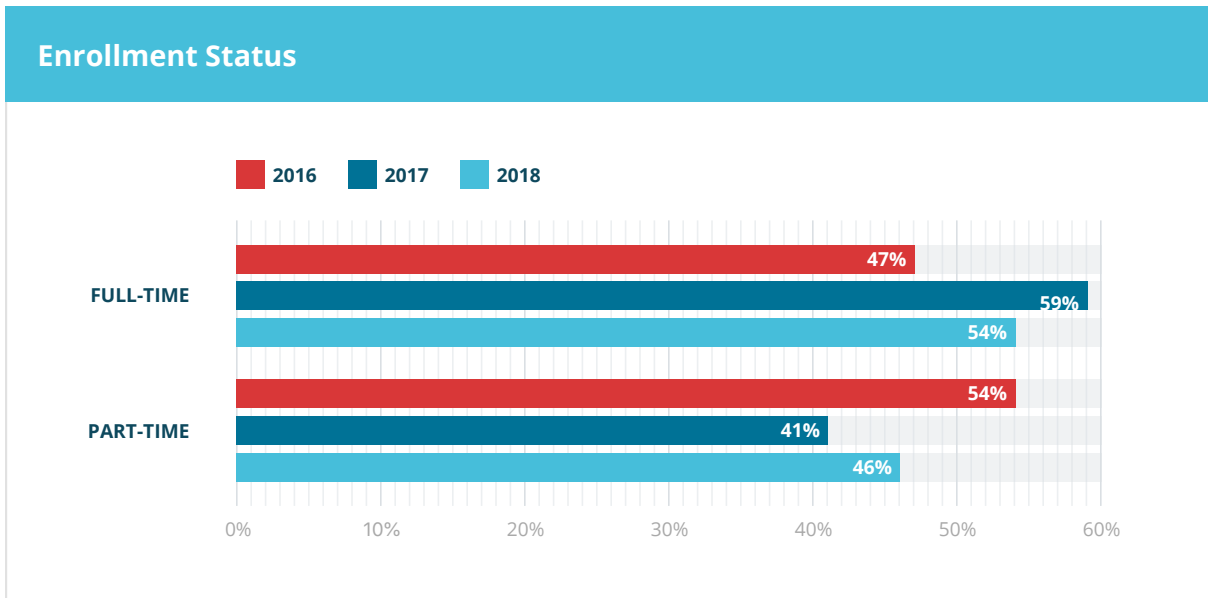


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## Student Participants

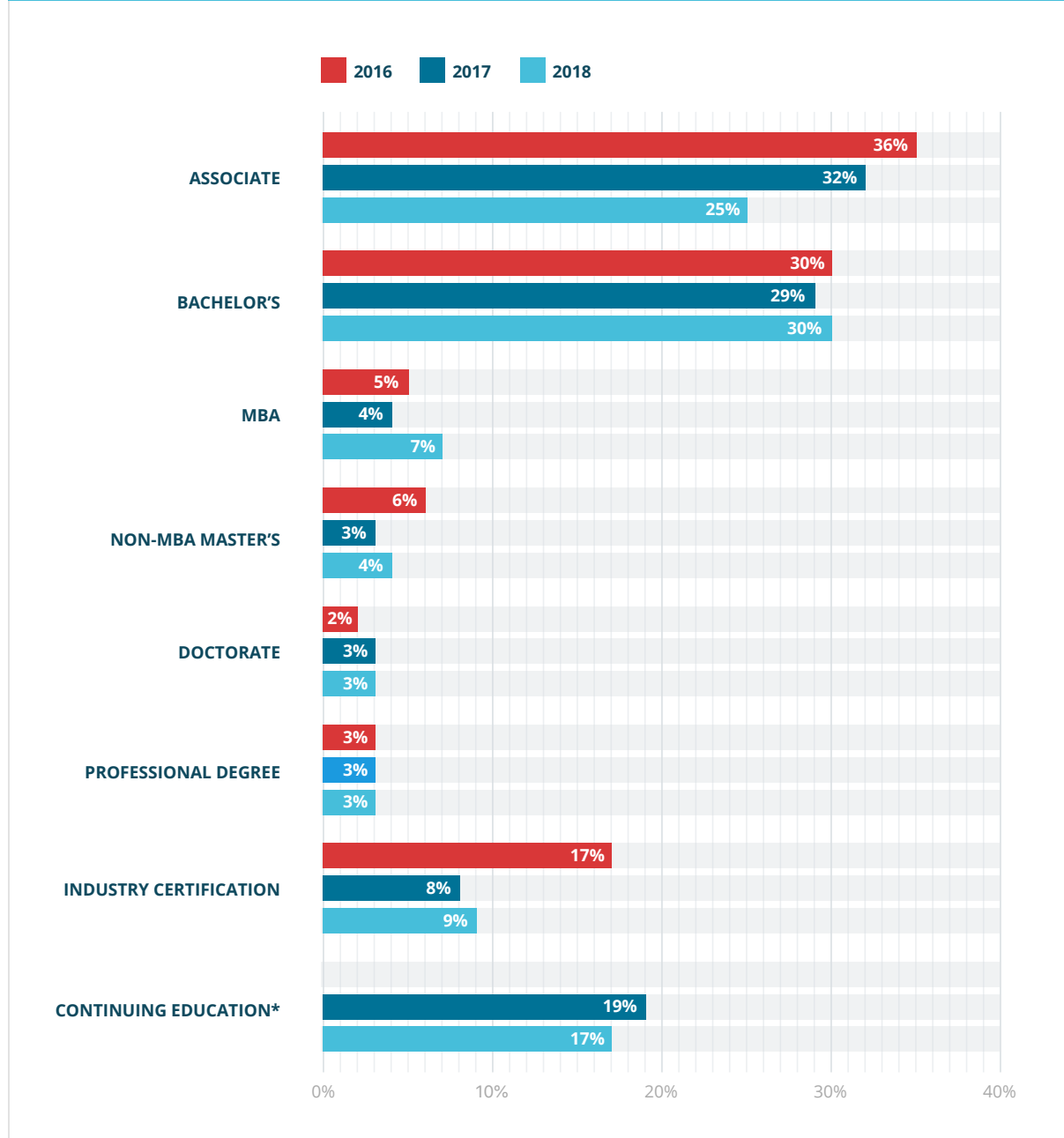


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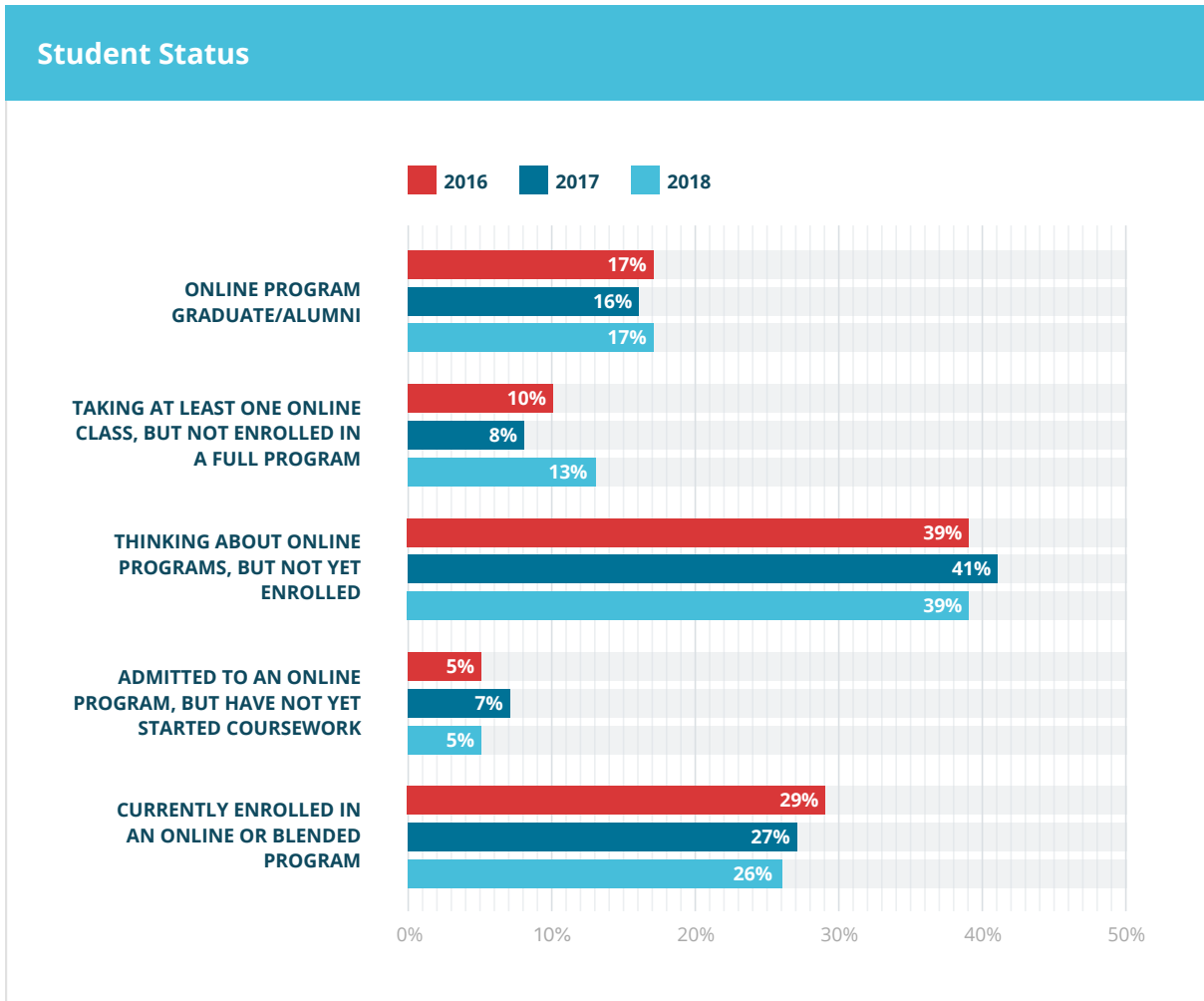
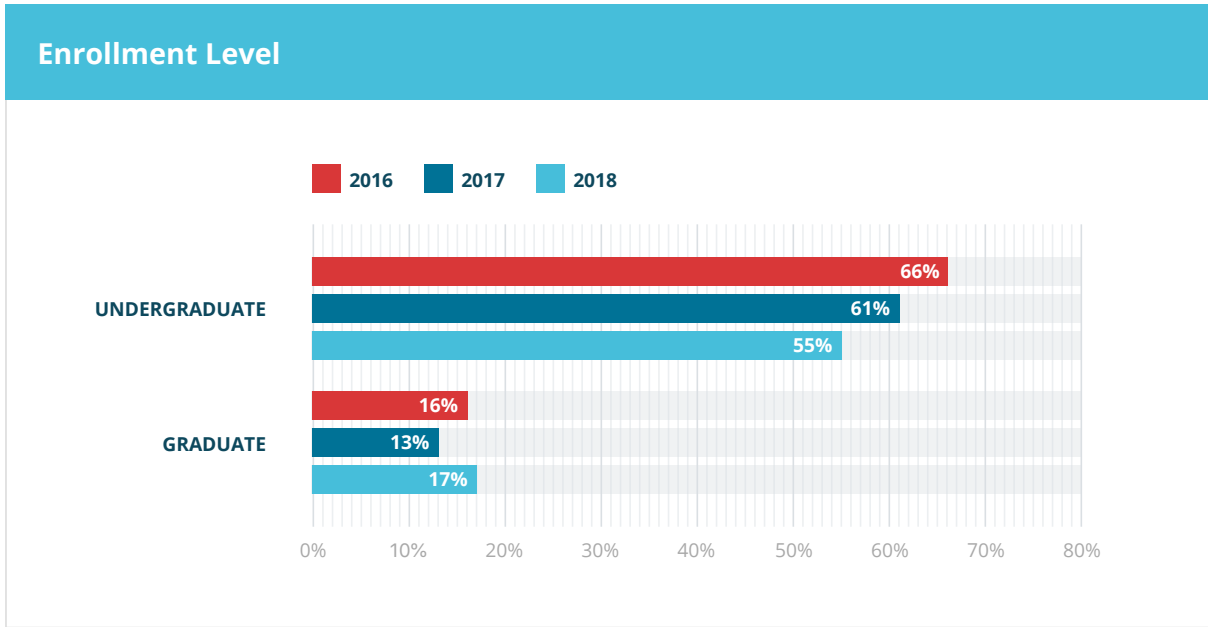
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## Degree Pursuing



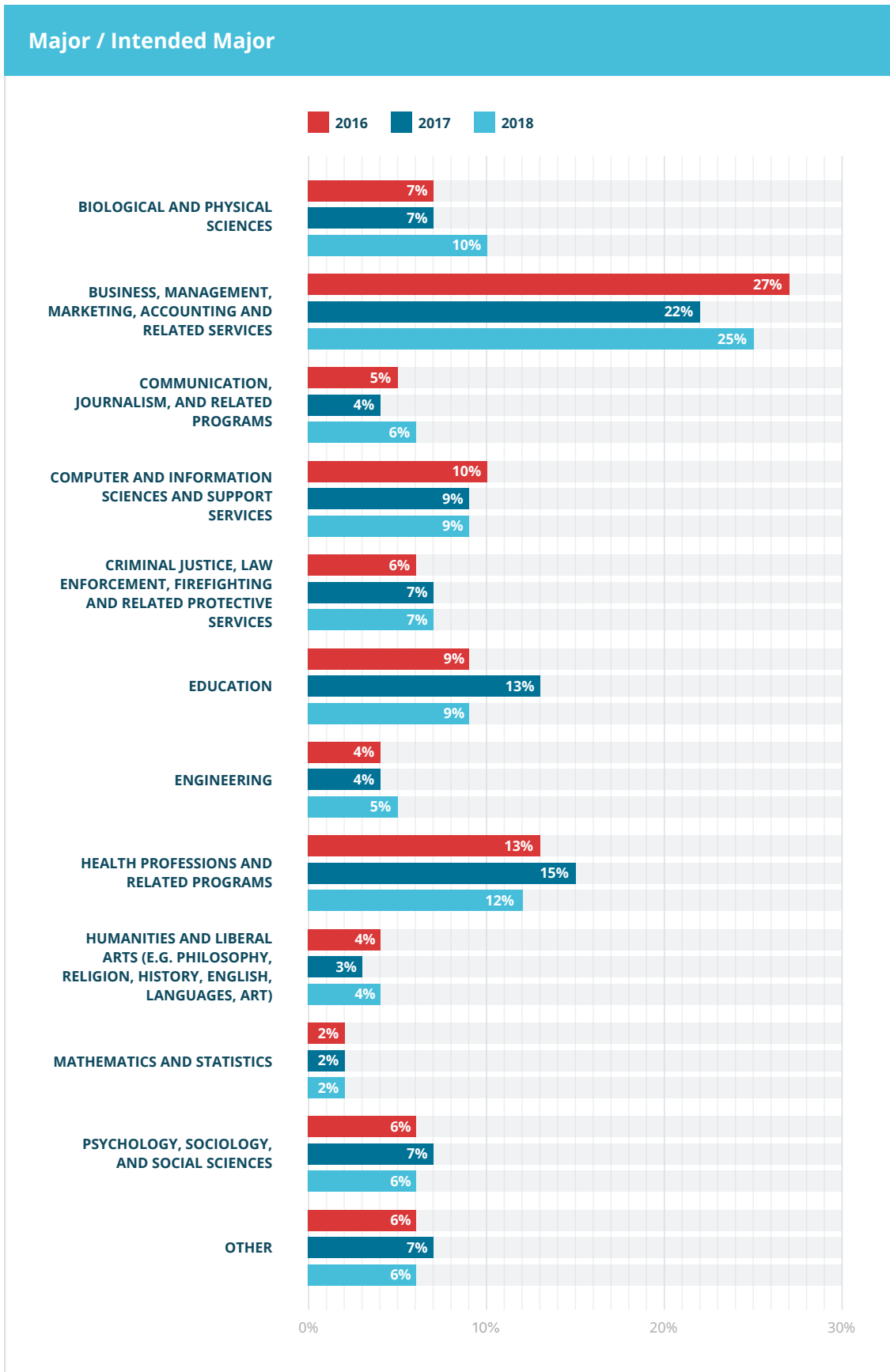
\* NEW CATEGORY BEGINNING IN 2017

# Appendices

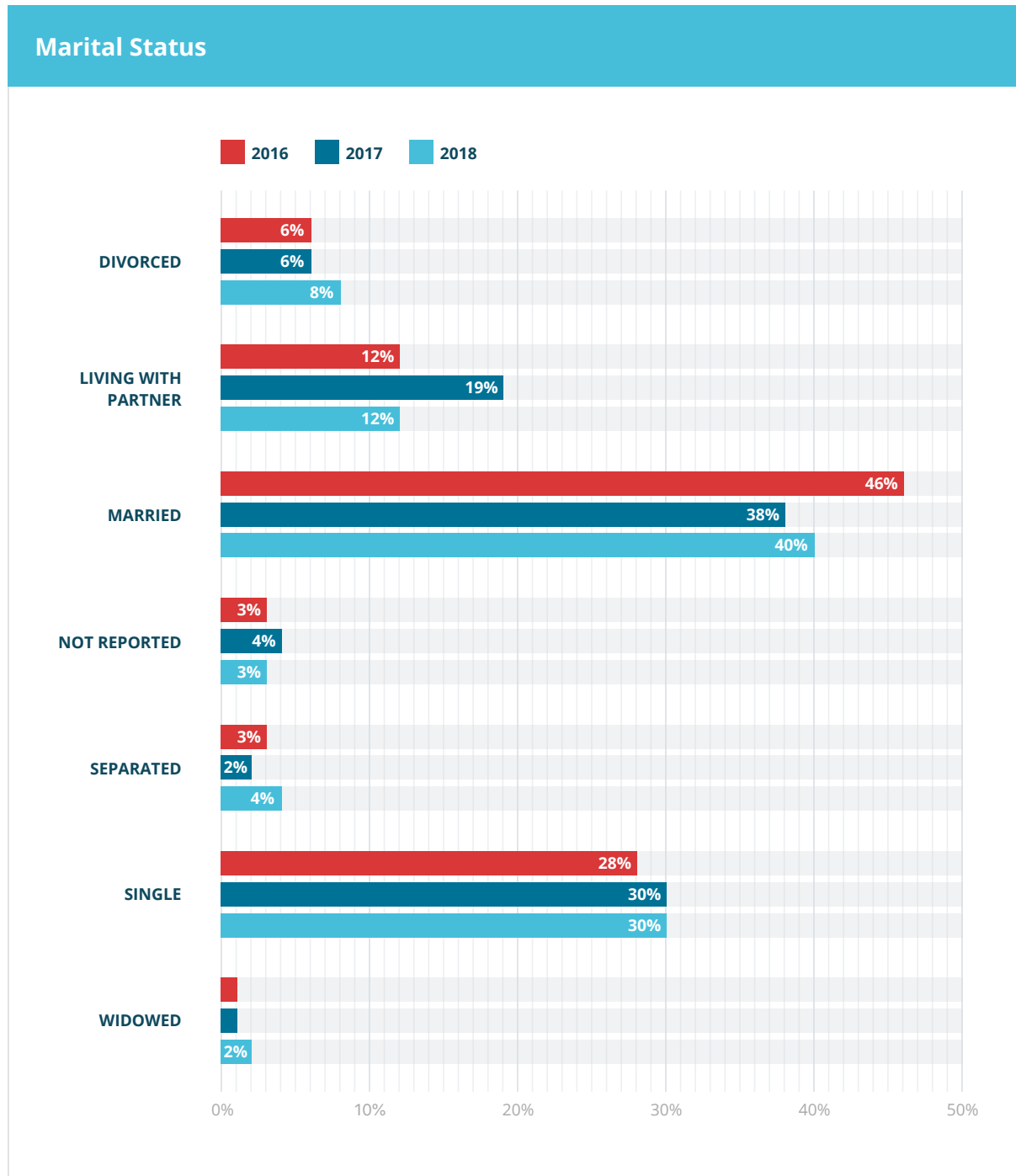




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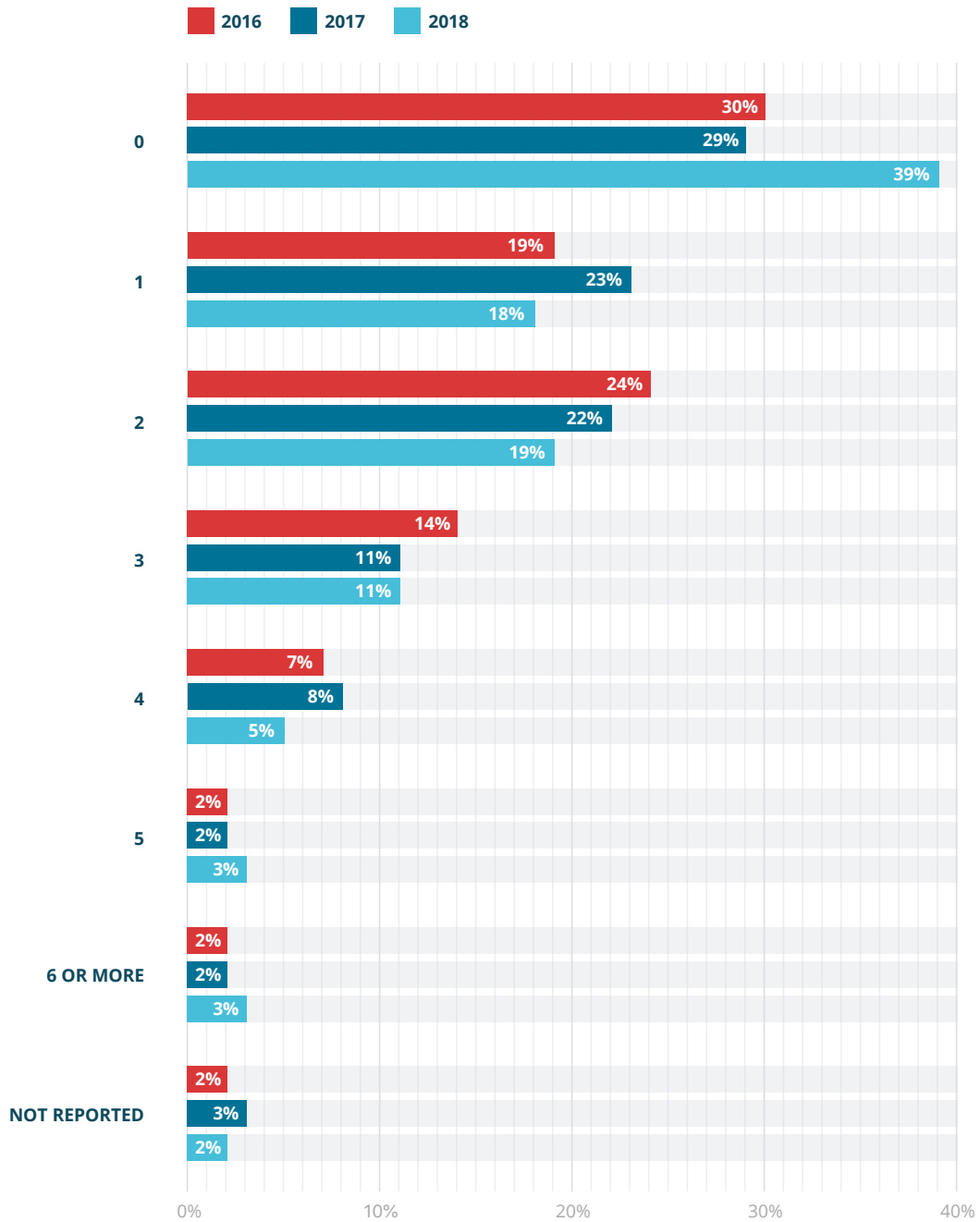


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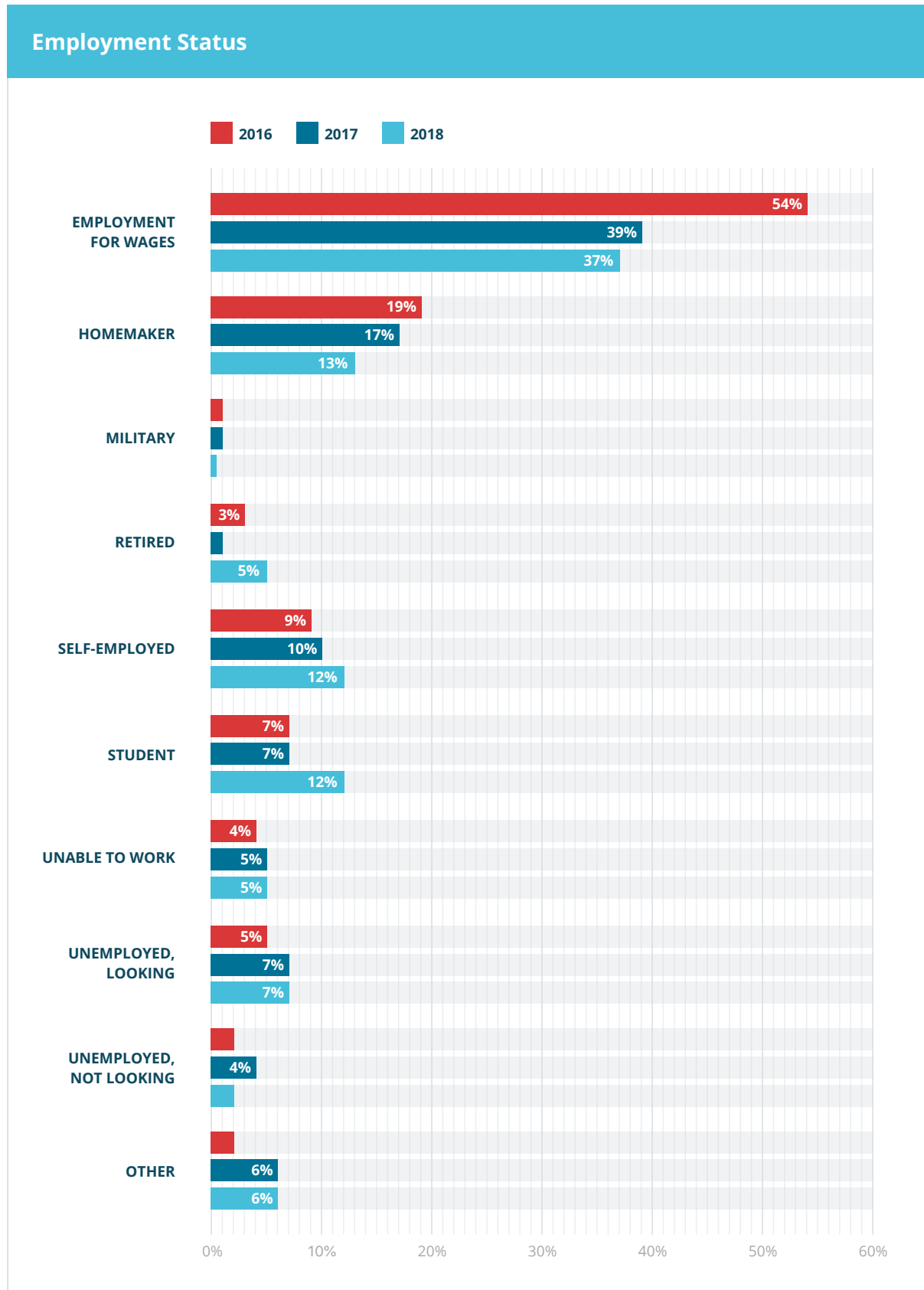


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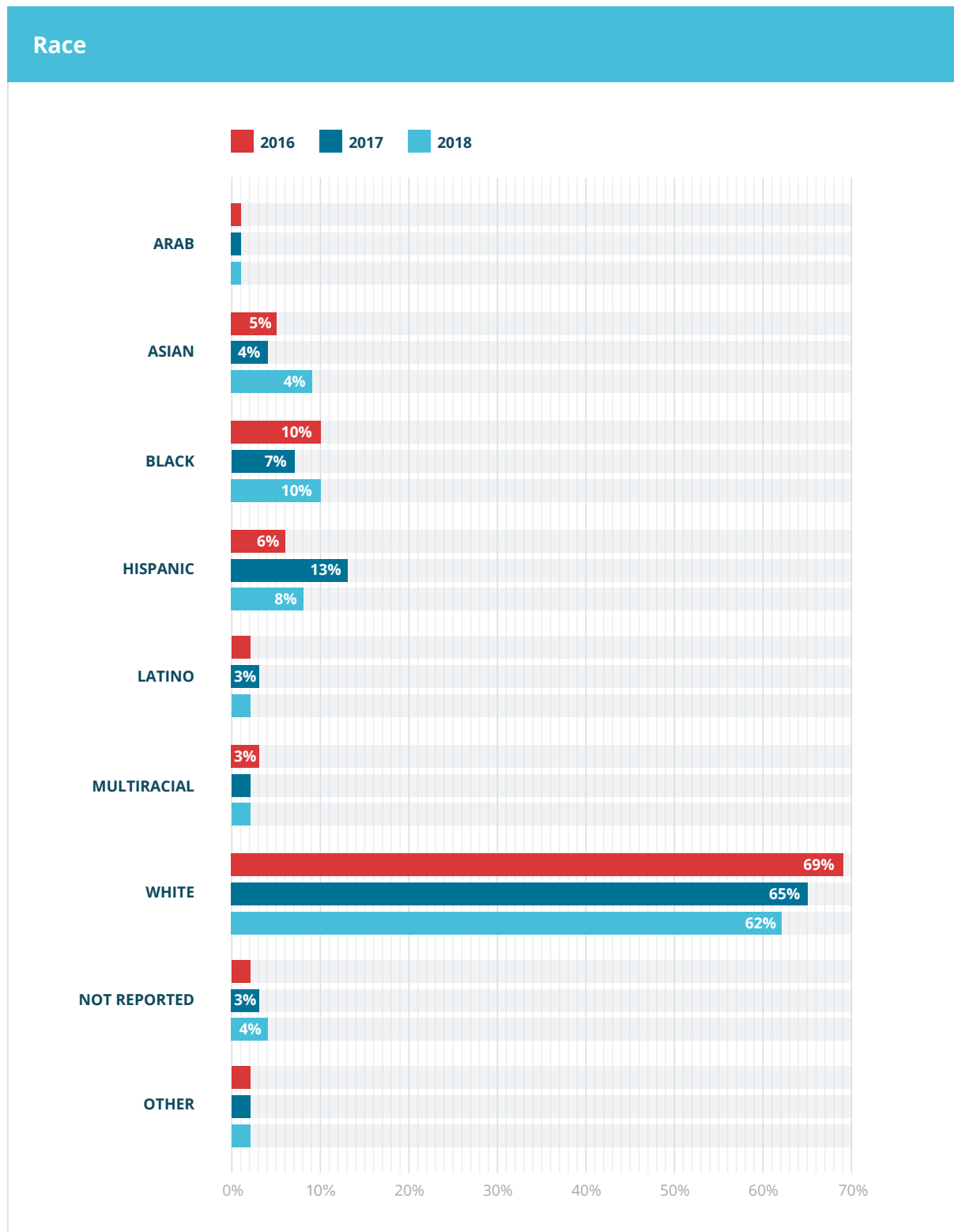
## Number of Children



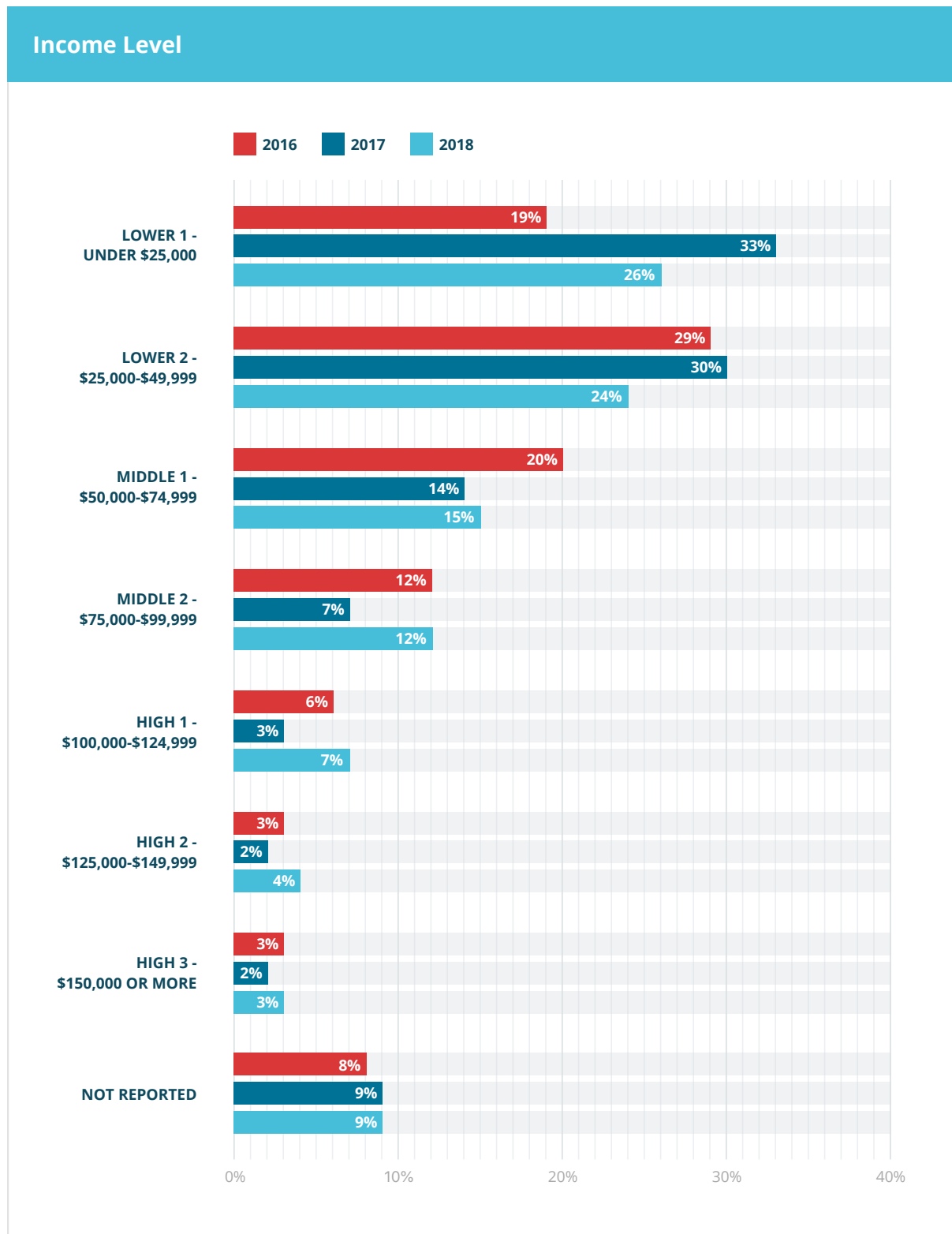
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# Appendices



# Appendices



# Appendices

## Number of Programs Offered at Each Degree Level/Percentage of Schools Reporting This Year

		0	1-5	6-10	11 - 25	26 - 50	51 OR >
CERTIFICATE	100% ONLINE	18.3%	56.5%	14.8%	6.1%	2.6%	1.7%
	BLENDED	28.4%	46.9%	14.8%	4.9%	2.5%	2.5%
ASSOCIATE	100% ONLINE	32.8%	45.4%	8.4%	9.2%	3.4%	.8%
	BLENDED	40%	30.6%	10.6%	10.6%	5.9%	2.4%
BACHELOR'S	100% ONLINE	24.8%	49.6%	12.4%	10.6%	1.8%	.9%
	BLENDED	36.8%	42.1%	6.6%	4%	6.6%	4%
MASTER'S (NON MBA)	100% ONLINE	18.7%	54.2%	15.9%	6.5%	3.7%	.9%
	BLENDED	31.5%	48%	11%	2.7%	5.5%	1.4
MBA	100% ONLINE	46.5%	52.3%	1.2%	-	-	-
	BLENDED	60.9%	39.1%	-	-	-	-
PROFESSIONAL (JD, ETC.)	100% ONLINE	84.1%	15.9%	-	-	-	-
	BLENDED	82.1%	16.1%	-	1.8%	-	-
PHD AND OTHER DOCTORATE (EDD, PSYD, ETC.)	100% ONLINE	71.1%	26.3%	1.3%	-	1.3%	-
	BLENDED	71.4%	25%	1.8%	-	1.8%	-

**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.

# Appendices

## REFERENCES

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