2020

Online Education Trends Report

Tracking trends in learner demographics and program development with insights from students and administrators.





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Executive Summary

The BestColleges sixth annual Online Education Trends report provides insights gleaned through feedback provided by students and school administrators. This year, our fourth year of reporting original data, includes participation from 398 school administrators and 1,500 students (prospective students, current students, and online program alumni). Findings are presented in five categories: online learner demographics, the online learning experience, online program marketing and recruitment, online program design and development, and online student satisfaction.

KEY FINDINGS

Online Learner Demographics

- 77% of online students enroll in their programs to help them reach career and employment goals.
- 47% of school administrators report trends in student demographics related to age –
 25% see students trending older, 20% see them trending younger.
- School administrators also see some increased diversity related to gender and ethnic groups in their student enrollment online.

The Online Learning Experience

- "Reputation of a specific school" ranked low again this year in the reasons students choose online learning over on-campus learning.
- A little more than half (57%) of students currently enrolled in an online degree or certificate program report that they visit their school's physical campus.
- About half of online students (49%) report that their online classes have synchronous components.

Online Program Marketing and Recruitment

- The two primary sources of information for students thinking about online programs are contacting schools directly (19%) and researching rankings websites (19%).
- For the fourth year in a row, online program alumni say they would "compare more programs" (26%) and "do more research about costs and financial aid" (25%) if they had to do it over again.

Online Program Design and Development

- Institutions decide to offer a new online program primarily based on perceived demand from both employers (72%) and students (71%).
- "Marketing new online programs to prospective students and meeting recruitment goals" remains the top concern about launching a new program, according to 65% of school administrators.
- Demand for online programs continues to be high 99% of administrators say they saw an increase last year or demand has stayed the same in the past few years.

Online Student Satisfaction

• Student satisfaction with online learning is high – overall, 94% say it has, or will have, a positive ROI and 95% would recommend online education to others.

Introduction

PROJECT GOALS

Enrollment in online college courses and programs continues to grow. A recent report from the National Center for Education Statistics shared that while overall college enrollment dropped from 2016 to 2017, the number of students enrolled in "exclusively distance education courses" grew by more than 4%. The number of students enrolled in "at least one ... distance education course" increased by more than 6% (Ginder, Kelly-Reid, & Mann, 2018).

This sixth annual Online Education Trends Report shares our latest look at the state of online education. BestColleges brings together student and school administrator perspectives to learn more about the online learning experience. This report includes our fourth year of original data collection, in which 398 school administrators and 1,500 students (including prospective students, current students, and online program graduates) participated. Survey results are compiled and presented in five primary categories to share trends in:

- Online learner demographics
- The online learning experience
- Online program marketing and recruitment
- Online program design and development
- Online student satisfaction

METHODOLOGY

We conducted two online surveys beginning in October 2019 and ending in December 2019.

Our outreach team connects with schools offering online courses, as reported by the Integrated Postsecondary Education Data System, via the SurveyMonkey web-based survey platform. This group includes public and private two- and four-year institutions. This year, 398 school participants responded to questions about online program management, new program development, and the future of online education.

A separate survey was used to collect information from online students using the PollFish mobile survey platform. We reached 1,500 current, prospective, and former online students who shared feedback about their learning experiences, expectations, and advice for future online students.

Online Learner Demographics

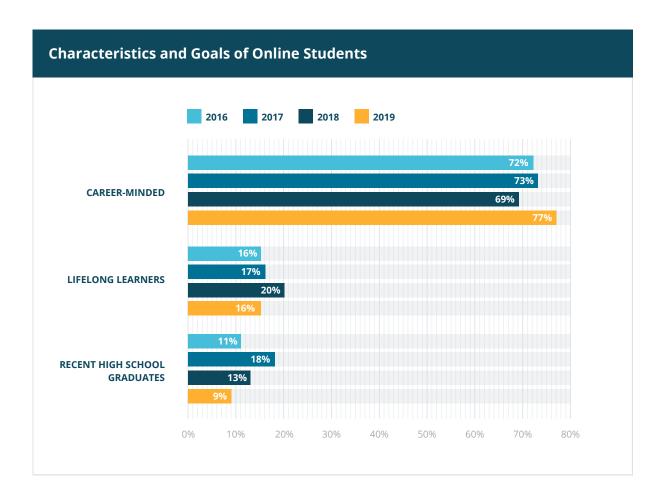
MOTIVATED BY CAREER AND EMPLOYMENT GOALS

Ladd, Reynolds, & Selingo (n.d.) identified six student segments, or categories, that move the conversation about demographics beyond the age-based labels of traditional and nontraditional. These categories describe different characteristics and motivations for pursuing a college education in addition to age.

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		

This work is used to frame our annual student survey in which participants are asked to identify their primary motivation for enrolling in an online program from among the six categories. We then collapse the six categories into three student types: recent high school graduates, career-minded students, and lifelong learners.

This year, 77% of respondents fell into the career-minded categories (i.e., industry switchers, career accelerators, career starters). This is the highest percentage in the history of this report, representing an 8% increase over the previous year. The graphic below shows the breakdown for this year's student participants.



This year, an equal number of 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 (37%) and industry switchers interested in changing their careers and entering a new field (37%).

Almost half (49%) of our school administrator respondents said prospective students are asking about placement or employment rates of online program graduates. They shared that students are also interested in a wide range of career-related information and support, such as graduate salaries, bar and board exam pass rates, alignment of careers with individual degree programs, transfer opportunities, and access to alumni mentors.



Online Students Enroll With Career Goals in Mind.

Many online programs are designed and developed around students' career goals. Share what you are doing to prepare online students for careers and employment. Consider how this information might resonate with prospective students as well as help create connections among current students and alumni.

EXPANDING AGE RANGE

Each year, we ask school administrators to share "the most significant trend in online student demographics" at their institutions. And each year, the responses have included references to student age.

This year, 47% of responses referenced age. Are online students getting older or younger? Perhaps both. School administrators' responses reflect a growing age range among online students, with 25% reporting a trend toward older (i.e., adult or nontraditional) learners and 20% reporting a trend of younger learners. Comments from school administrators include:

- "Adult learners trying to earn a bachelor's degree."
- "Skewing younger once we offered [a] full degree program online."
- "We used to have mostly older adults. We are now seeing an increase in first-time college students starting online."
- "Increase in students over the age of 40."

In addition to reflecting on age groups, school administrators also shared that they are seeing an increase in students returning after an absence or as transfer students. This group may be part of the increase in older students seen in some programs. Other administrators reported that they are seeing an increase in dual-credit or dual-enrollment students. These typically younger students are working to accrue college credits while still in high school.



Online Students Are Getting Older and Younger.

Our study provides a national look at online student demographics and shows, for the second year in a row, some evidence of a widening age range in online programs. Preparing to meet the needs, experience levels, and expectations of these students in your online classes should be a priority. This has potential implications for everything from recruiting and admissions to support services and faculty development. Take some time to explore student demographics in your online programs.

DIVERSE POPULATIONS

The "typical" student participating in our survey this year can be described as: female (56%), between the ages of 24 and 44 (58%), studying at the undergraduate level (57%), married or living with a partner (53%), having at least one child (60%), Caucasian (66%), employed (56%), low-income (50%), and enrolled full time (56%).

While our student survey did not capture a widely diverse population, school administrators report seeing increased diversity at their institutions and in individual programs online. This year, 12% of school administrator respondents said they are seeing a trend in more diversity in student enrollment across genders, ages, and ethnic groups. Comments from school administrators include:

- "As with our area, we are becoming more diverse particularly with our Hispanic population."
- "Average age is starting to come down and [we're seeing] an increase in males, which were lower than females by a significant amount."
- "As an HBCU, we are starting to see more of our online students be Caucasian or of Middle Eastern heritage."
- "More female students are taking online courses."

SOPHISTICATED DECISION-MAKING

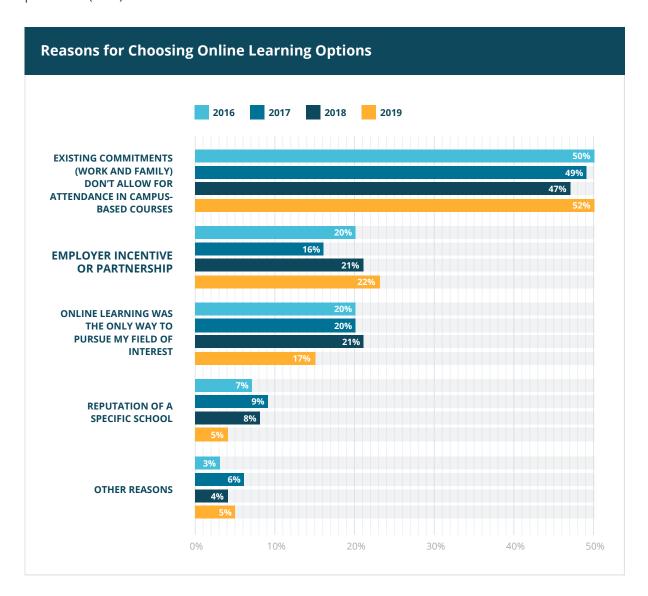
This year, school administrators shared additional observations about online students that offered clues about the ways their preferences, attitudes, and goals might impact their decision-making. Comments included the following:

- "Students in licensure- and certification-eligible programs want face-to-face instruction with some blending for convenience."
- "Students are more sophisticated, [more] outcomes- and value-proposition-oriented."
- "Increase in adult learners with full-time life factors they are balancing: families, work, illness, etc. (real-life factors)."

The Online Learning Experience

ONLINE VS. ON CAMPUS

When we asked students why they chose online learning instead of a traditional campusbased program, for the fourth year in a row, the convenience and flexibility to study around existing commitments topped the list (52%), followed by not having other options to pursue their fields of interest (22%) and employer incentives or partnerships with online education providers (17%).



"Reputation of a specific school" was again a low priority for prospective distance learners. While this option has never had a high response rate, it also has seen a slight but steady decline over the four years of data collection.

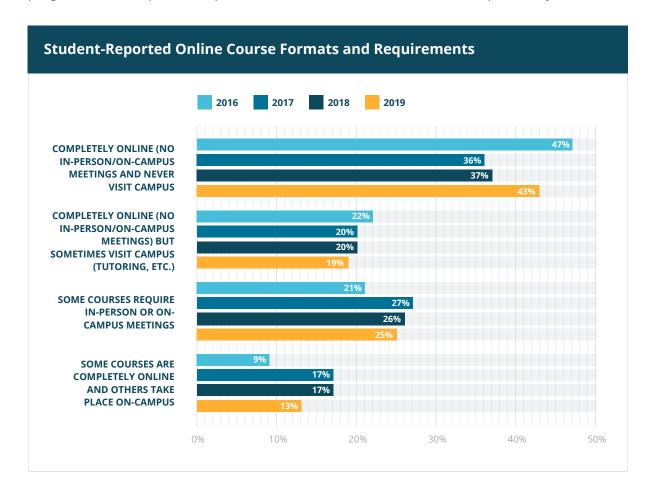


Students Don't Choose a Program Based on Reputation Alone.

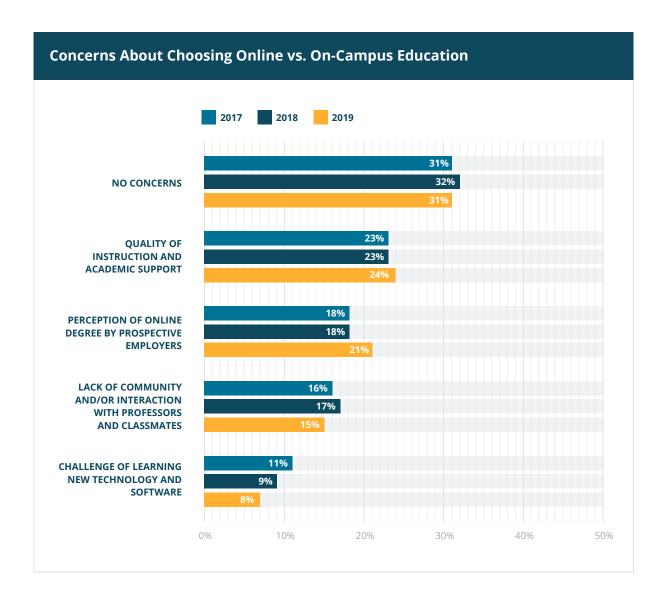
In all years of data collection for this study, students have indicated that the "reputation of a specific school" is not a high-priority factor in their decision to enroll. Perhaps reputation is most impactful when there are negative connotations. Almost 20% of students choose their program because of an employer incentive or partnership, which may mean reliance on any vetting that might have been done by the employer. Building a positive reputation is important, but schools should also focus on sharing how their programs offer scheduling flexibility and provide access to study specific areas of interest.

VISITING CAMPUS LOCATIONS

A little more than half (57%) of students currently enrolled in an online degree or certificate program report that they visit their school's physical campus, either by choice or because their program has an in-person requirement. This is a decrease from 63% the previous year.

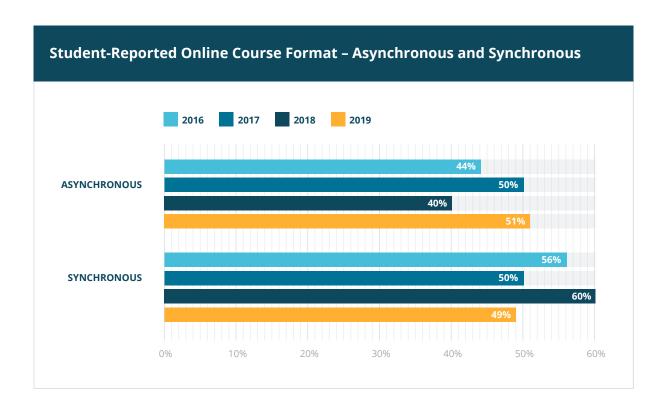


Are online students concerned about choosing online learning instead of on-campus options? For the third year in a row, almost one-third (31%) reported "no concerns," while "quality of instruction and academic support" topped the list for those who did have concerns.



SYNCHRONOUS VS. ASYNCHRONOUS

This year, we saw a decrease in the number of currently enrolled students reporting synchronous components in their online courses (i.e., live, scheduled class meetings). In 2018, we observed a small surge in use of synchronous formats, but 2019 saw a return to the 50/50 divide seen in 2017.



This ratio is similar when we look at program level – undergraduate (52%) and graduate (50%). Of all the students who report synchronous components in their online classes, 35% say they "never visit campus," while that number jumps to 51% for those reporting primarily asynchronous classes.

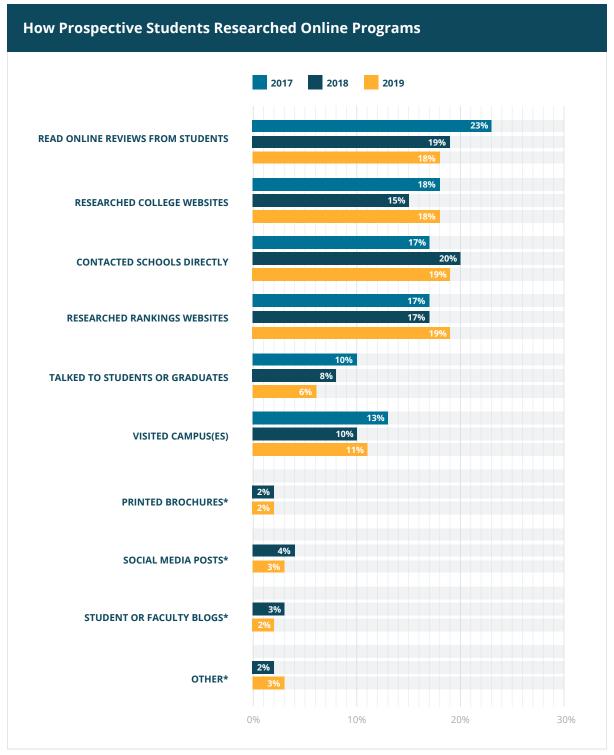
Online Program Marketing and Recruitment

COMPARING AND CHOOSING ONLINE PROGRAMS

This year, our student survey participants shared that their primary sources of information as prospective students researching the online options were "contacting schools directly, e.g., email, texts, phone calls" (19%) and "researching rankings websites" (19%).

Other popular research methods were "reading online reviews from students on sites such as Cappex, GradReports, Unigo" (18%) and "researching college websites" (18%).

In addition to the options we provided in the survey, some students added that their research was narrowed to 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 or had taken courses previously.



* NEW CATEGORIES IN 2018

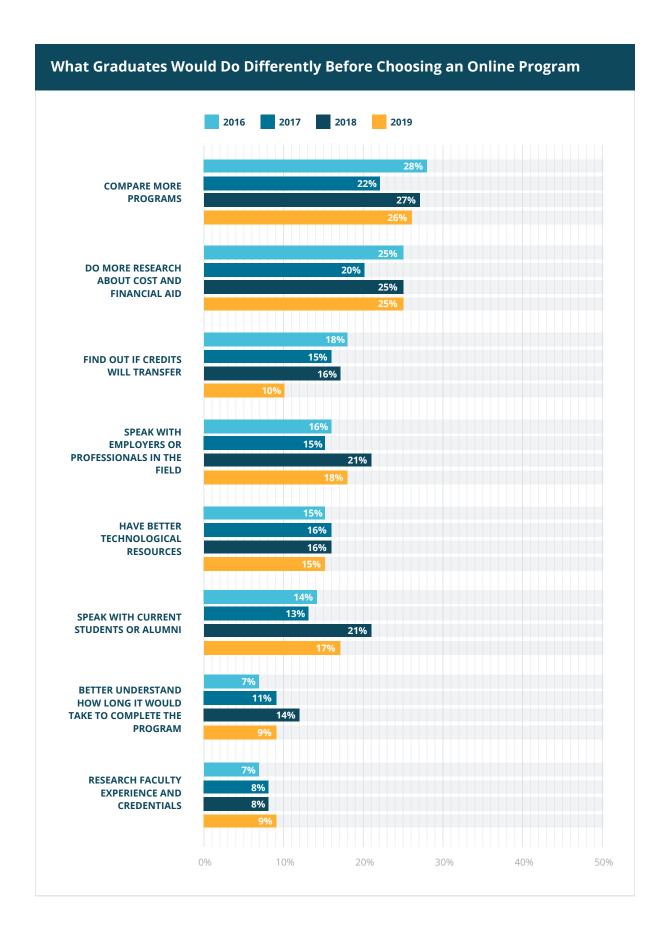


It May be Time to (Re)Assess Outreach Efforts.

This year, we saw some small changes in how prospective students research online learning options. Four primary methods are almost evenly split, led by "researching ratings websites" and "contacting schools directly." How are prospective students interacting with your institution and individual programs? Explore those initial points of contact, ranging from online forms and chat tools to admissions offices and rankings in which your programs are featured. While social media can be a powerful resource for connecting with an audience, our surveyed students are not heavily engaged on those platforms for college research purposes.

ADVICE FROM ONLINE ALUMNI

For the fourth year in a row, alumni said they would "compare more programs" and "do more research about cost and financial aid" if they were to revisit the process of choosing an online program. This year, we saw the biggest decreases in the number of online alumni who wish they had done more to "find out if credits would transfer" and "better understand how long it would take to complete the program."



Making the decision to attend an online program can be daunting. With so many choices and sources of information, what are the biggest challenges students face when making this decision? In all four years of our data collection, the top two responses are consistently "estimating actual costs" and "applying for financial aid and identifying sufficient funding sources."

Biggest Challenges Students Face When Choosing an Online Program				
	2016	2017	2018	2019
Estimating actual costs (tuition, books, etc.)	#1	#1	#1	#1
Applying for financial aid and identifying sufficient funding sources	#2	#2	#2	#2
Finding a program that meets my needs and interests	#6	#3	#3	#3
Finding sufficient information about academic requirements	#3	#5	#4	#4
Finding information about how graduates fared in the job market	#5	#4	#5	#6
Contacting a real person to ask detailed questions about specific programs	#4	#6	#6	#5

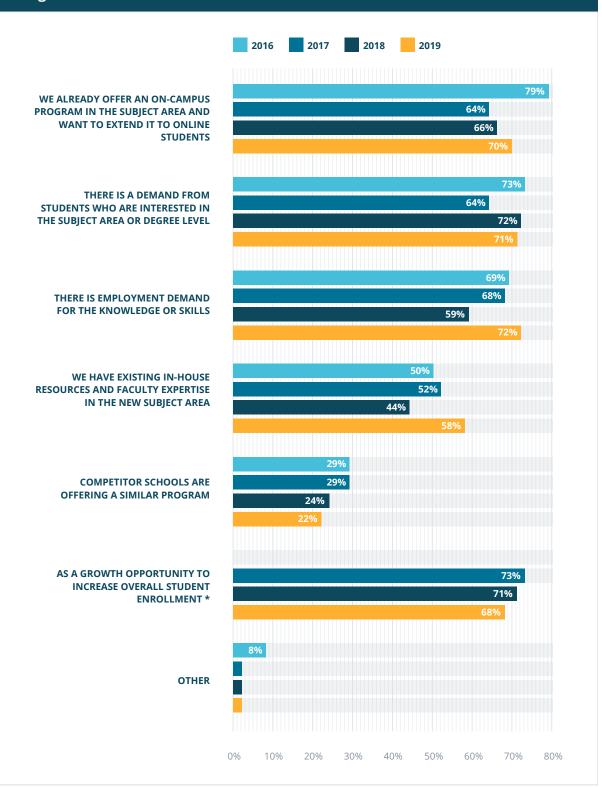
LAUNCHING NEW PROGRAMS

We asked our school participants to provide some insight into how their institutions decide to offer a new online program. This year's primary factors were related to perceived demand from both employers (72%) and students (71%). While the potential for growth often found in adding new online programs is still a factor, the percentage of administrators identifying that as a primary motivation has decreased slightly over the past three years.

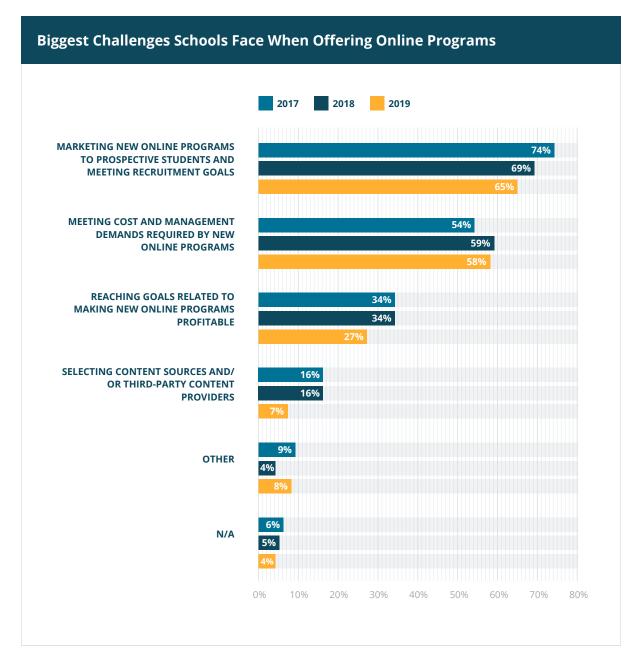
Deciding to offer a new program is the beginning of a complex process. We asked school administrators to share their biggest challenges related to launching these programs. "Marketing new online programs to prospective students and meeting recruitment goals" remains the top concern this year, reported by 65% of respondents, though that response has decreased slightly each year.

"Reaching goals related to making new online programs profitable" and "selecting content sources and/or other third-party content providers" saw the largest decrease in response this year.

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



^{*} NEW OPTION BEGINNING IN 2017



^{*} E.G., FACULTY TRAINING, TECHNOLOGY INFRASTRUCTURE, HELP DESK, ADMINISTRATIVE FUNCTIONS)

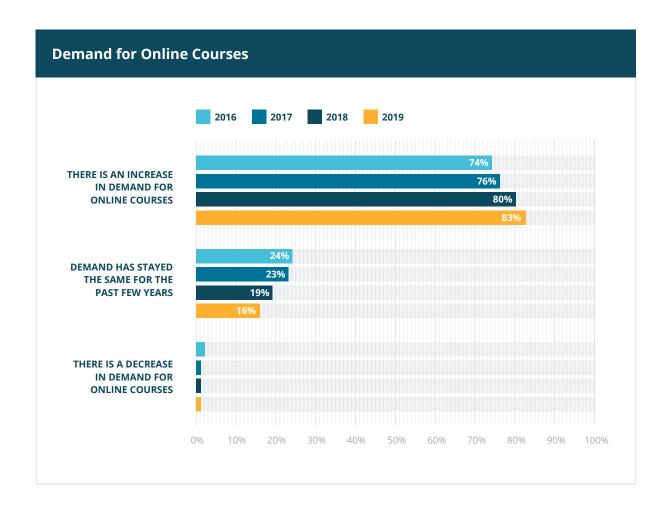
The "other" challenges reported by online program administrators this year reflect three primary areas of concern:

- Staffing Administrators report challenges related to finding faculty members that match the market demand and qualified instructional designers. Limited budgets also play a role in reported staffing issues.
- Enrollment Several concerns were shared related to retention of online students and concerns about cannibalization of on-campus students to fill online programs.
- Quality Efforts to maintain online academic rigor and integrity, efficient access to materials and services, and compliance with U.S. Department of Education and accreditation requirements were all cited as concerns.

Online Program Design and Development

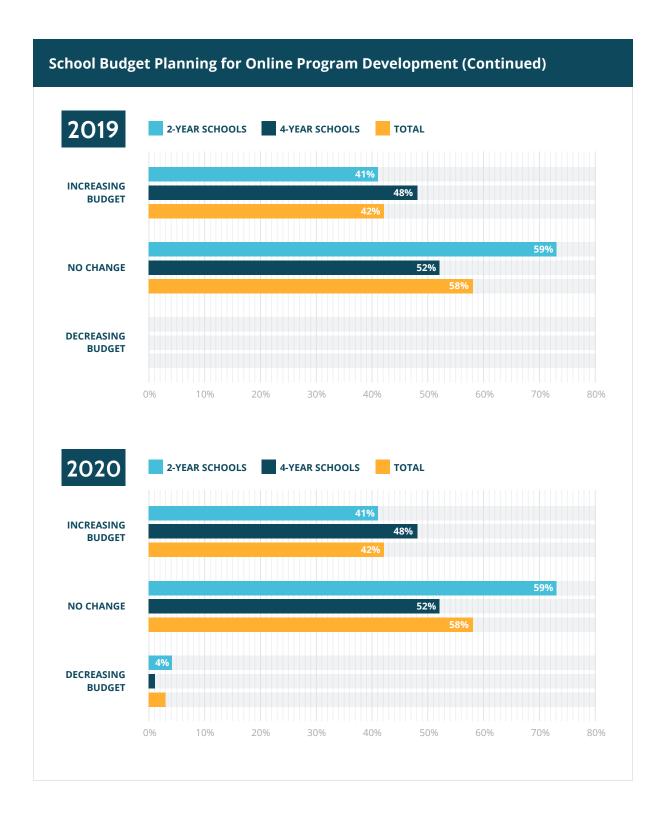
BUDGETS AND DEMAND

What is the demand for online programs in the higher education industry? In each of the past four years, the majority of school administrators shared that the demand for online education has increased compared to the previous year. This year, 99% report that this demand has increased or stayed the same.



This year, almost half (49%) of the administrators participating in our survey said that they anticipated increasing budgets for online programs, while 48% said there will be no change from last year. These findings are similar to those in previous years of this study. A few administrators are planning to decrease online education budgets this year. This is a small group overall (3%), but it's up from no schools decreasing their budgets last year.





The top three areas of anticipated growth in online education have remained relatively unchanged over the past three years. Business, healthcare, and computer and information science majors continue to lead the lists provided by school administrators. This year, several additional subject areas entered the top five, including human services degrees (e.g., counseling, psychology, social work) and general education and associate of arts programs.

Тор	Top Areas for Growth in the Next 5 Years – Academic Disciplines				
	2017	2018	2019		
1.	Business (30%)	Healthcare (30%)	Business (20%) / Healthcare (20%) TIE		
2.	Healthcare (23%)	Business (26%)	Business (26%)		
3.	Computer Science (12%) / Faith-Based Topics (12%) TIE	Computer Science (13%)	Faith-Based Topics (8%)		
4.	General Studies (8%)	Education (6%)	Human Services (Counseling, Psychology, Social Work) (7%)		
5.	Education (7%)	Faith-Based Topics (4%)	General Education & Associate of Arts (6%)		

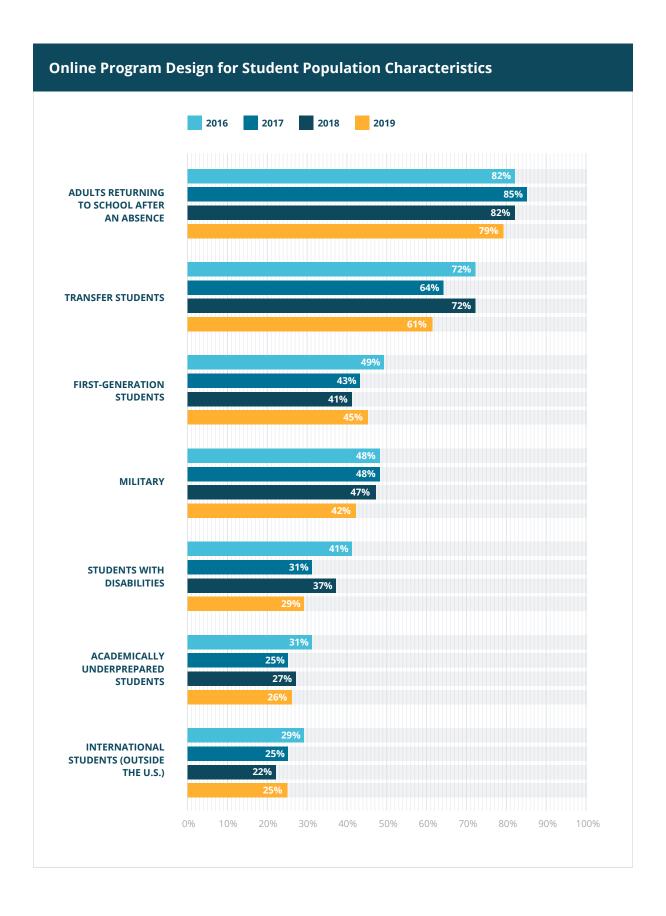


Schools Are Thinking Beyond the "Big 3" to Consider Additional Majors and Courses.

Each year, we ask school administrators to share their thoughts on which specific academic majors or disciplines will see growth in online education over the next five years. It may be no surprise to see the "Big 3" often listed: business, healthcare, and computer science programs. This year, we saw these listed – although in decreasing numbers – and the addition of other majors and topics, such as human services and general education.

TARGET STUDENT POPULATIONS

As we have seen in reporting learner demographics over the past several years, students bring a variety of backgrounds and needs to their online classrooms. Many institutions and programs take these specific student characteristics into consideration when designing a new program. For the fourth year in a row, schools seem most focused on designing offerings with adult/returning students, transfer students, military students, and first-generation students in mind.



ONLINE STUDENT SUPPORT

Students who have successfully completed online programs are a helpful source of information about the challenges faced on the way to graduation. The top reported roadblocks have been consistent throughout the years of this study, led by "paying for higher education while minimizing debt" and "unexpected circumstances or events in my personal life."

This year, we also saw a slight increase in the number of students reporting difficulties with "staying on track with my classes so I could graduate in the planned time frame."

Top Roadblocks to Completing an Online Program (Alumni Responses Only)					
	2017	2018	2019		
Paying for higher education while minimizing student debt	28%	34%	35%		
Unexpected circumstances or events in my personal life	19%	20%	20%		
Staying on track with my classes so I could graduate in the planned time frame	13%	12%	17%		
Not having enough of my transfer credits count toward degree requirements	12%	13%	11%		
Scheduling on-campus visits to support my program (testing, orientation, tutoring, etc.)	13%	7%	5%		
Maintaining a minimum GPA	6%	5%	5%		
Having access to the required technology or internet connectivity	6%	5%	6%		

While this year none of our school administrators indicated that their primary role was "faculty," some did respond that they teach online classes. These administrators shared that their students' most significant challenges involve college finances (35%), managing unexpected life events (28%), and staying on track with their courses (24%). This aligns with what online students shared this year.



BEST COLLEGES INSIGHT

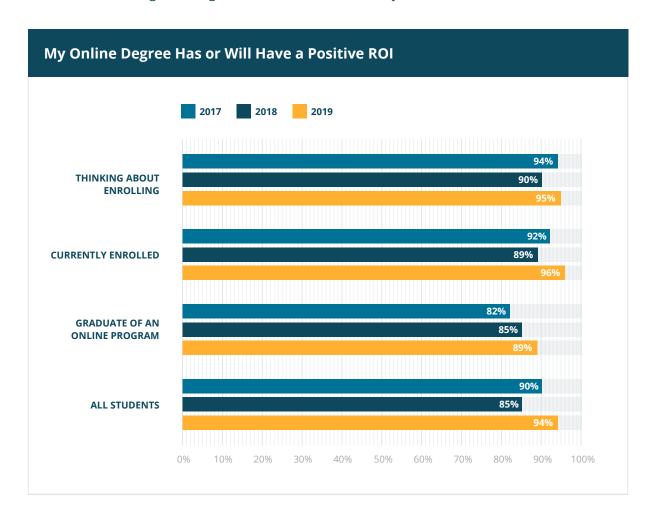
Schools and Programs Are Aware of the Challenges Faced by Online Students.

It's probably no surprise that online students are most challenged by finances and unexpected life events. And these challenges can easily impact each other, as in the case of a student facing an unexpected illness that comes with medical bills, for example, or dealing with a job loss that impacts employer-contributed tuition, and subsequently impact learning progress. Staying on track in online courses, which are often offered in short academic terms, can quickly become a roadblock to graduation. Understanding and acknowledging these challenges is the first step. Integrating academic curricula and online delivery with support services and targeted interventions may help students connect with the assistance they need as early as possible to improve their chances of graduating.

Online Student Satisfaction

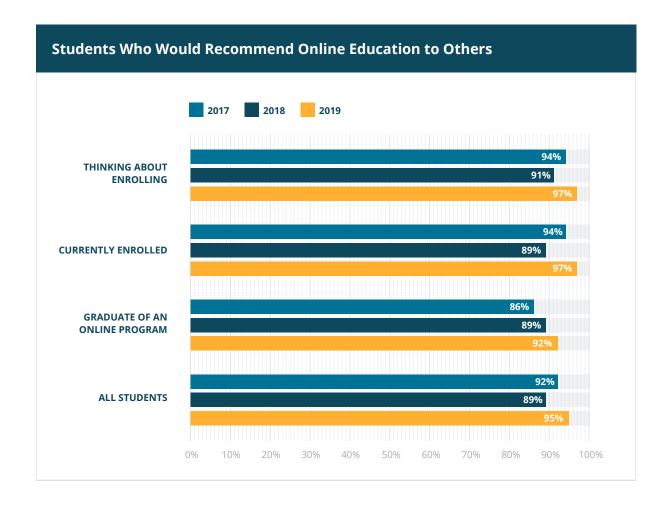
RETURN ON INVESTMENT

Currently enrolled students are the most positive about the potential return on investment (ROI) of their online programs. While all student status categories reported higher percentages this year, the trend of lower perceptions of ROI across the student journey continues. Students who have graduated from online programs report a less positive outlook for ROI than students who are considering enrolling and those who are currently enrolled.



RECOMMENDING ONLINE EDUCATION TO OTHERS

When asked if they would recommend online education to others, the response from students across the student journey are again overwhelmingly positive. This year, 95% of all students said they would recommend online education, with a slight decrease from those who are considering enrolling and those currently enrolled (97%) to those who have already graduated (92%).



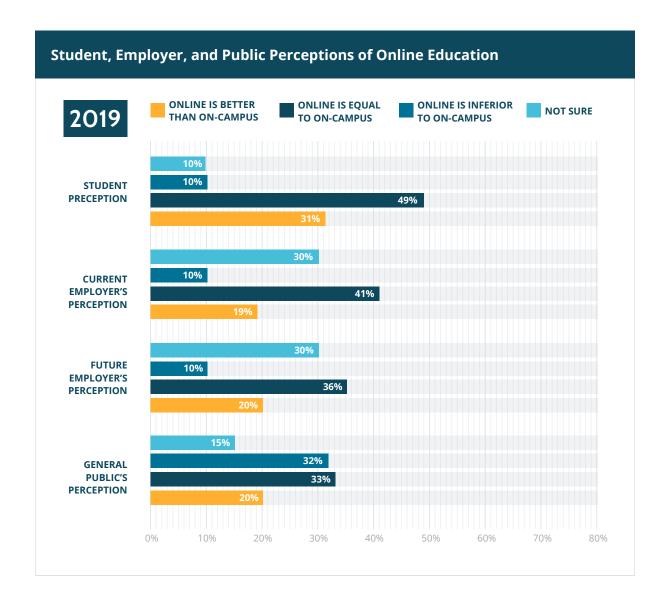
PERCEPTIONS OF ONLINE EDUCATION

For the past three years, we've also asked students about their perceptions of online education in comparison to on-campus education. We also asked them to share thoughts about employers' perceptions.

Do learners think online education is better than, equal to, or inferior to on-campus education? As in previous years, responses this year indicate that a majority of students (80%) feel that online learning is "better than" or "equal to" on-campus learning.

Students' largest area of uncertainty is related to ideas about what their future employers might think about online education. The percentage of students stating that they are "not sure" about these employers' perceptions has risen slightly over the past three years. Students' ideas about society's perception of online education are generally positive; however, there has been a slight increase annually in those who think society's perception is that online education is inferior.







BEST COLLEGES INSIGHT

Overall, Student Satisfaction With Online Education Is High.

We explored online student satisfaction through student responses to questions related to return on investment (ROI), willingness to recommend to others, and overall perception. In all years of this study, the responses have been overwhelmingly positive. These students are busy, managing work, school, and family life. They've voiced their challenges, but they've also shared encouraging results achieved through persistence and focus on their goals.

Conclusion

How can colleges and universities support students pursuing their degrees online? These learners have more options to consider than ever, and they are enrolling with specific needs and goals in mind. The upcoming decade will require continued monitoring of changing demographics and students' needs along with a renewed commitment to improving support services.

Our insights from this year's trends study include a variety of considerations for online programs and institutions.

Online Students Enroll With Career Goals in Mind.

Many online programs are designed and developed around students' career goals.
 Share what you are doing to prepare online students for careers and employment.
 Consider how this information might resonate with prospective students as well as help create connections among current students and alumni.

Online Students Are Getting Older and Younger.

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Take some time to explore your current student demographics. Preparing to meet
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classes should be a priority. This has potential implications for everything from
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concerned.

Schools Are Thinking Beyond the "Big 3" to Consider Additional Majors and Courses.

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Contributors



About Melissa A. Venable Ph.D.

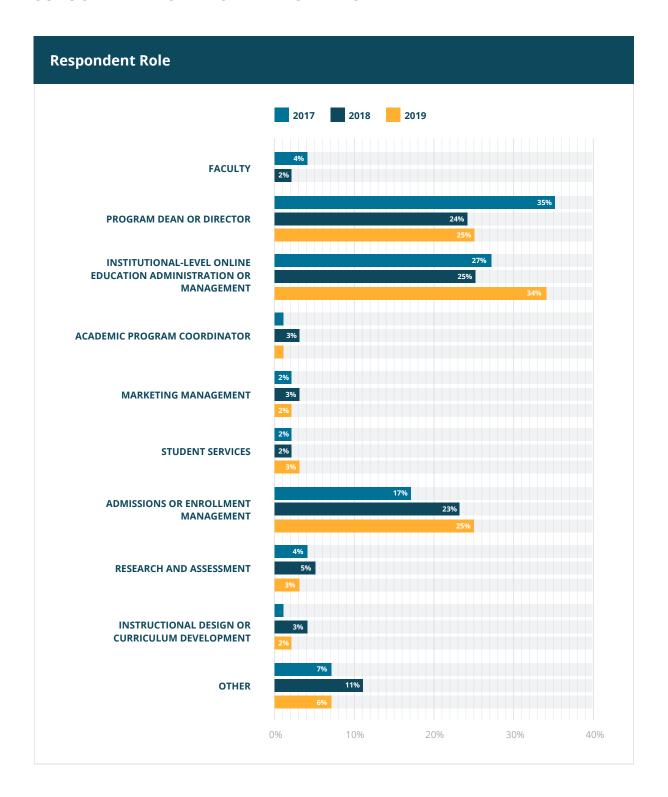
Melissa A. Venable, Ph.D. is an online education advisor for BestColleges. In this role, she leads this annual survey research project reporting online education trends found through student and school administrator feedback. Melissa is an adjunct faculty member and course designer at Saint Leo University and the University of South Florida and a certified career coach with a background in career development services. She earned her doctorate in instructional technology at the University of South Florida with research interests in distance education and support services for online students.

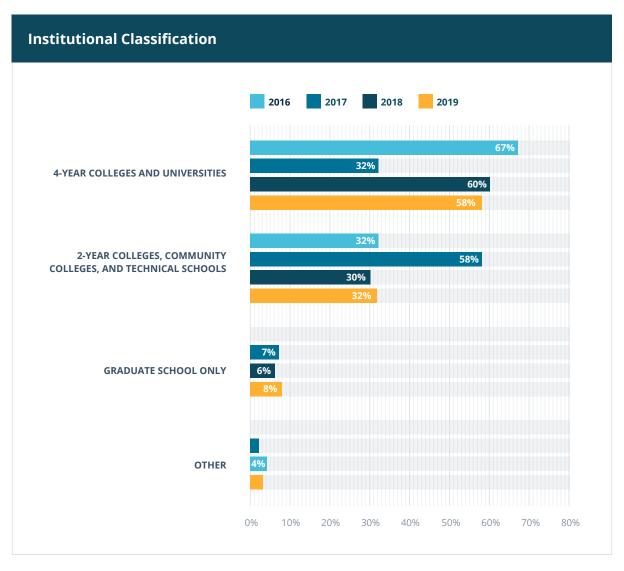
ABOUT BESTCOLLEGES

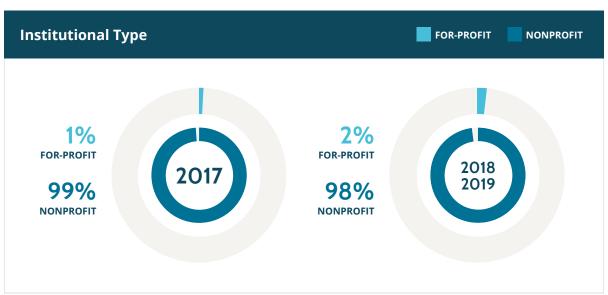
BestColleges empowers students to make smarter educational decisions and find schools that best fit their needs through proprietary research, user-friendly guides, and hundreds of unique college rankings. As a trusted education advisor, BestColleges also provides a wide array of college planning, financial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

Appendices

SCHOOL ADMINISTRATOR PARTICIPANTS



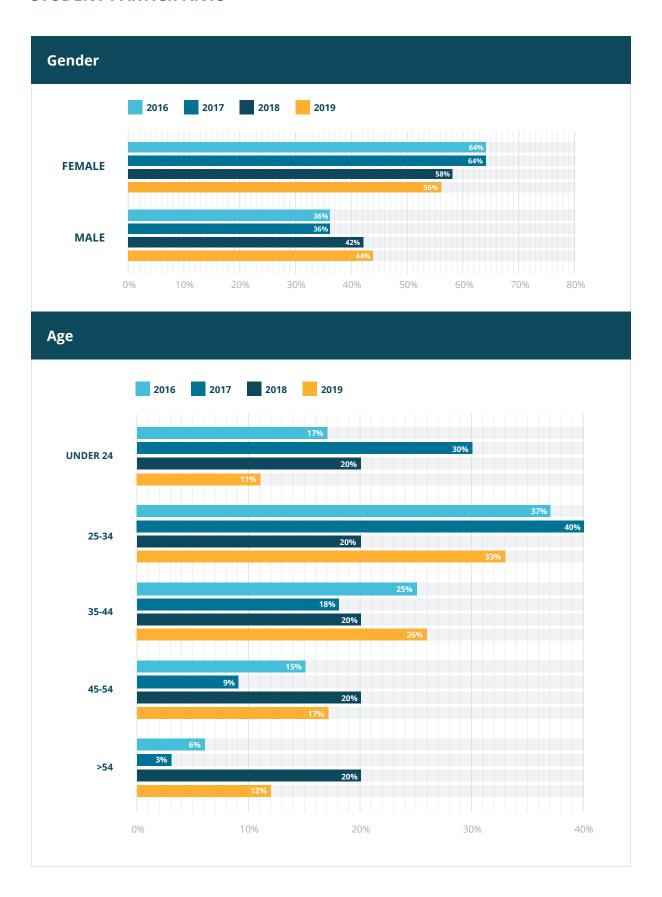


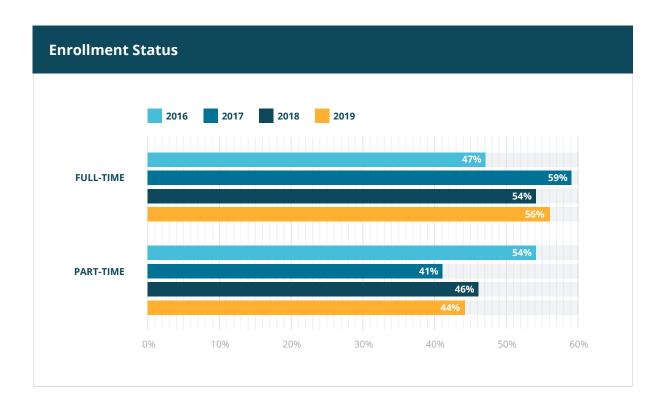


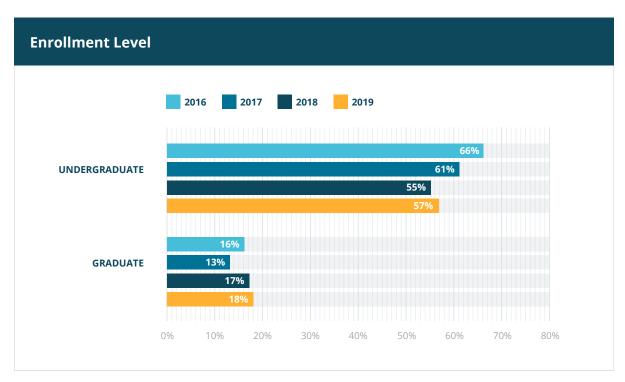
Number of Programs Offered at Each Degree Level/Percentage of Schools Reporting This Year

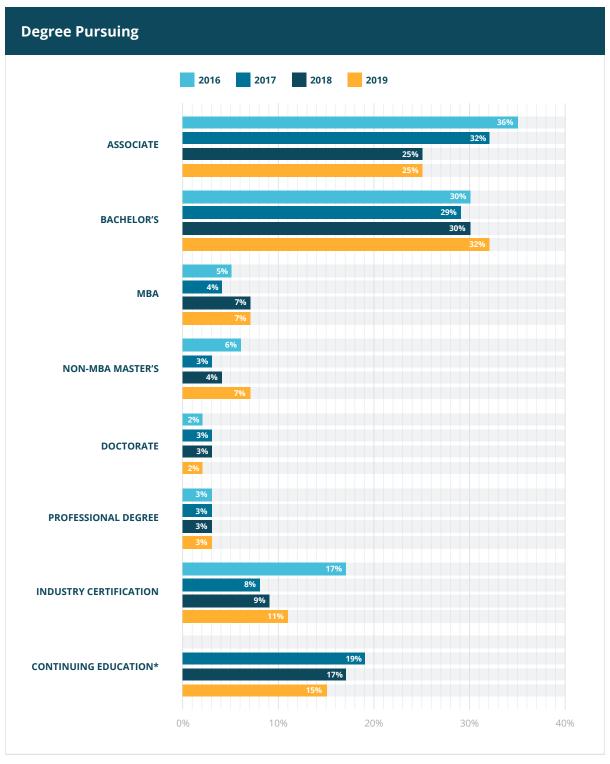
		0	1-5	6-10	11 - 25	26 - 50	51 OR >
CERTIFICATE	100% ONLINE	16%	51%	14%	12%	4%	4%
	BLENDED	33%	31%	13%	11%	3%	10%
ASSOCIATE	100% ONLINE	32%	46%	12%	8%	1%	1%
	BLENDED	39%	24%	7%	13%	8%	8%
BACHELOR'S	100% ONLINE	25%	45%	15%	10%	4%	1%
	BLENDED	44%	37%	7%	6%	4%	1%
MASTER'S (NON MBA)	100% ONLINE	23%	49%	14%	12%	1%	-
	BLENDED	36%	55%	6%	1%	-	1%
МВА	100% ONLINE	48%	48%	4%	1%	-	-
	BLENDED	78%	22%	-	-	-	-
PROFESSIONAL (JD, ETC.)	100% ONLINE	88%	12%	-	-	-	-
	BLENDED	76%	24%	-	-	-	-
PHD AND OTHER DOCTORATE (EDD, PSYD, ETC.)	100% ONLINE	58%	42%	-	-	-	-
	BLENDED	63%	37%	-	-	-	-

STUDENT PARTICIPANTS

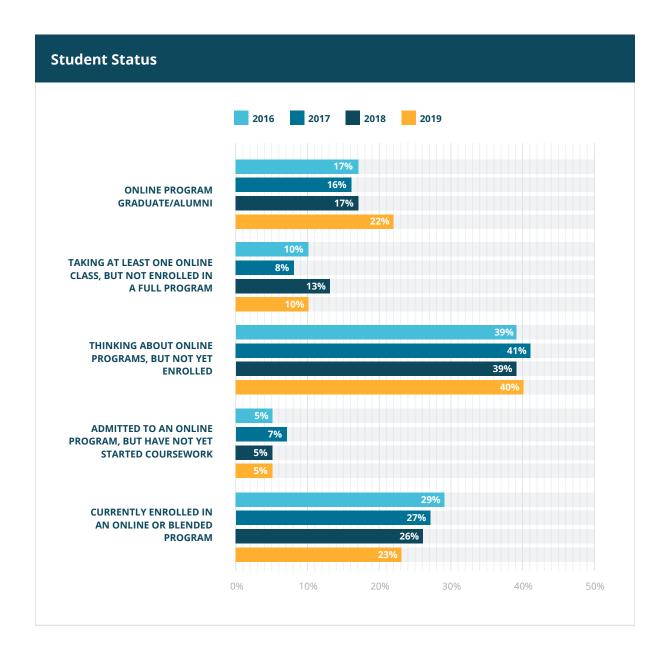


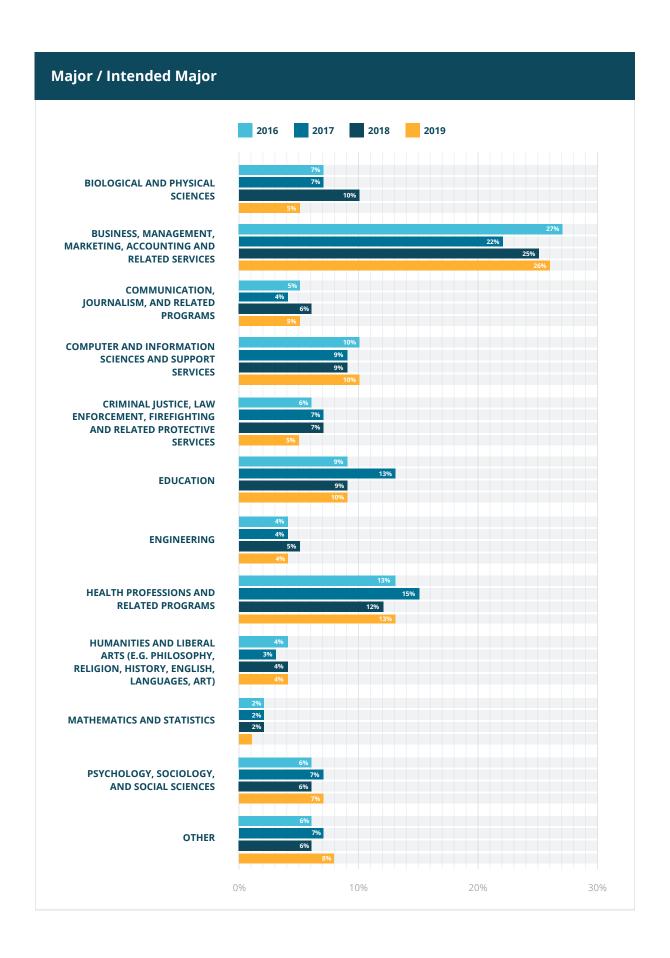


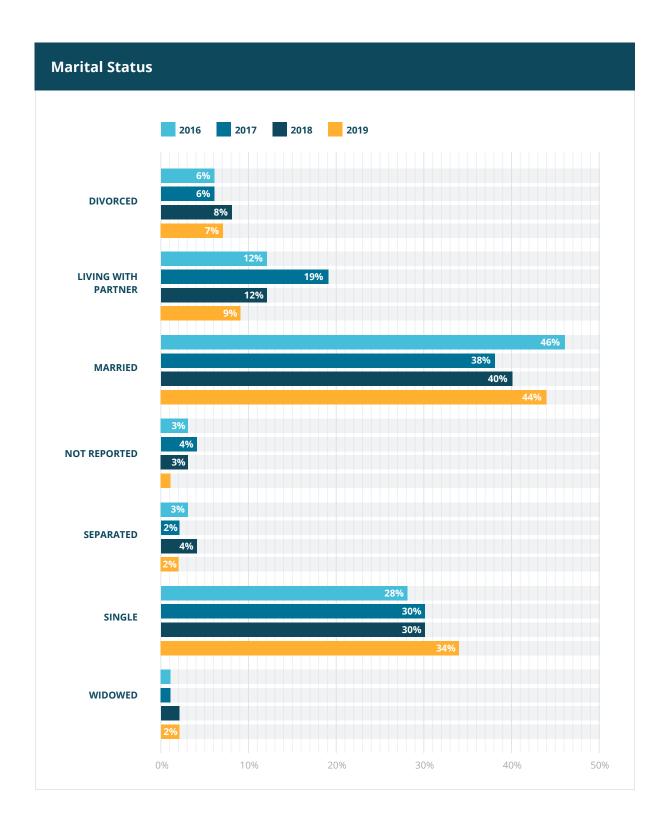


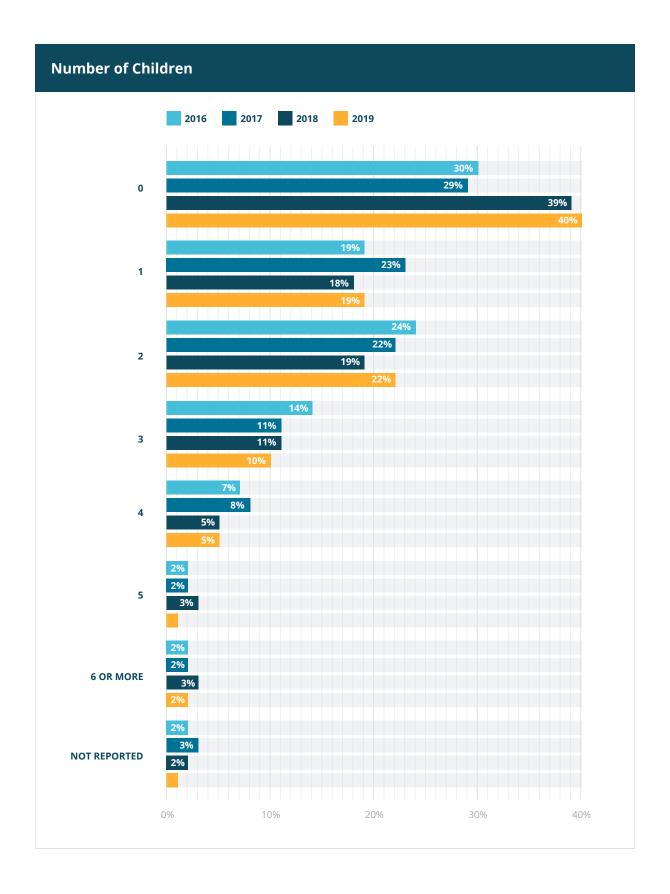


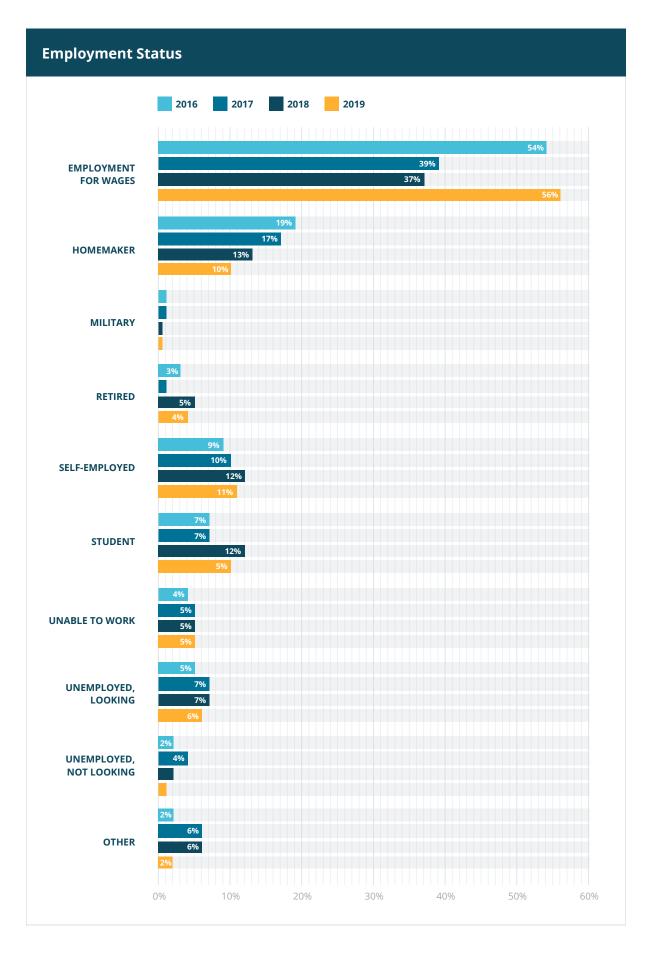
* NEW CATEGORY BEGINNING IN 2017

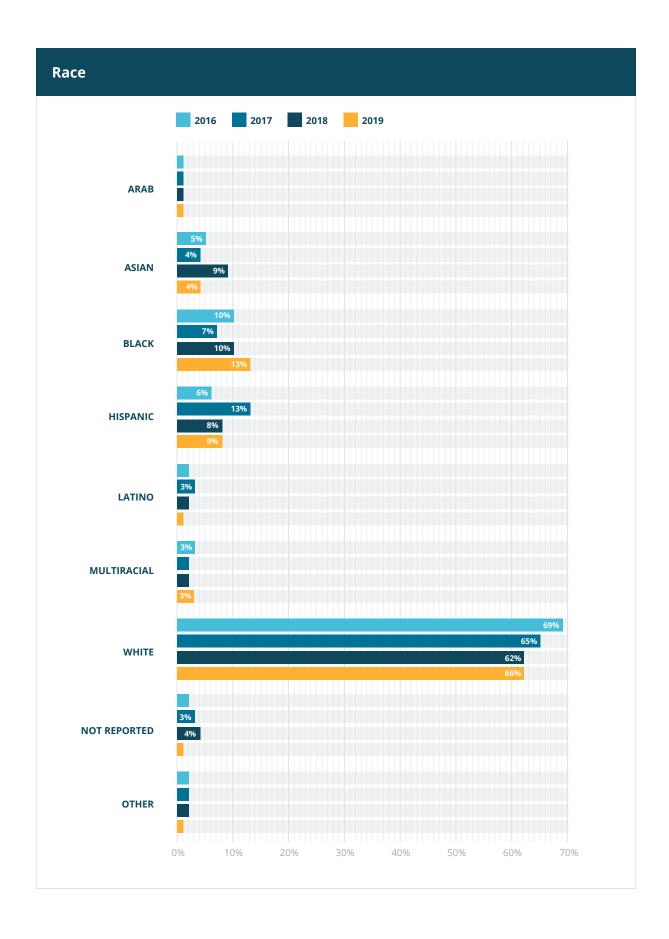


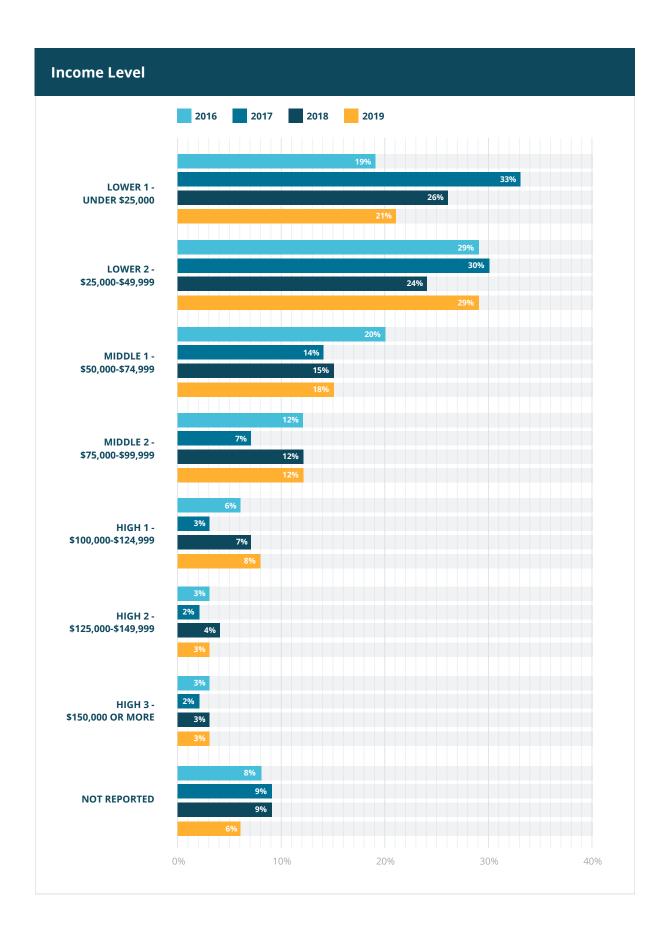












DATA NOTES

- 1. Percentages reported in this document have been rounded, resulting in some totals adding up to just under or over 100.
- 2. Several charts and descriptions present results for questions in which survey participants could select more than one response.
- 3. Findings reported from school administrators are based on the number of participants responding to each question; all questions, except a screening question related to delivery of online programs, were optional.
- 4. All data is self-reported.

REFERENCES

Ginder, S.A., Kelly-Reid, J.E., and Mann, F.B. (2018). Enrollment and Employees in Postsecondary Institutions, Fall 2017; and Financial Statistics and Academic Libraries, Fiscal Year 2017: First Look (Provisional Data) (NCES 2019- 021rev). U.S. Department of Education. Washington, DC: National Center for Education Statistics. Retrieved January 6, 2020 from http://nces.ed.gov/publications

Ladd, H., Reynolds, S., & Selingo, J. (n.d.). The Differentiated University: Recognizing the Diverse Needs of Today's Students. The Parthenon Group. Retrieved January 6, 2020 from https://www.luminafoundation.org/files/resources/the-differentiated-university-wp-web-final.pdf





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