2021

Online Education Trends Report

BestColleges' seventh annual Online Education Trends Report provides the latest online and remote learning experience data with insights from students and school administrators.

Best Colleges

Online Education Trends Report

An Annual Survey of Students and School Administrators

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Executive Summary

BestColleges' seventh annual Online Education Trends Report offers insights developed by analyzing feedback provided by students and school administrators. This report includes our fifth year of original data collection and features participation from 366 school administrators and 1,800 students. Students surveyed include prospective online students, current online students (i.e., those enrolled in fully online programs), current remote learners (i.e., those enrolled in courses not offered in person due to COVID-19), and online program alumni. Findings are presented in four categories: the learning experience, marketing and recruitment, program design and administration, and student satisfaction.

KEY FINDINGS

The Learning Experience

- Paying for college while minimizing student debt remains the top challenge to reaching graduation, as reported by online program graduates every year for the past four years.
- Almost half (49%) of remote learners anticipated enrolling in online courses after their campuses return to normal operations.
- More than one-quarter (28%) of remote students believed the impact of COVID-19-related changes on their college experience will have lasting effects on their mental health.

Marketing and Recruitment

- Almost half (48%) of online and remote students were motivated by career and employment goals to enroll in their programs.
- Students' biggest challenge to making a decision about online education was finding a program that met their needs and interests.
- Students were most likely to rely on college websites and online student reviews when researching and comparing online programs.
- If online program graduates could do it over again, they would conduct more research about costs and financial aid and compare more programs.

Program Design and Administration

- One-third (33%) of school administrators planned to continue with both remote and online course options after returning to normal campus operations.
- Twelve percent of administrators realized they don't need to be on campus to perform their jobs.
- Almost half (47%) of administrators said there is a need for more investment in instructional design-related processes and resources.
- A majority (58%) of administrators shared that institutional finances are the most challenging aspect of preparing for 2021.
- The vast majority (96%) of administrators said that faculty development is a top priority in the coming year.
- Eighty-three percent of administrators agreed that there will be an increased need for online courses over the next few years, related to issues such as social distancing.

Student Satisfaction

- Ninety-five percent of students overall, and 83% of remote learners, said they would recommend online or remote learning to others.
- An overwhelming majority (93%) of students said they have had or expect a positive return on their online education investment.
- Overall, a majority (74%) of students thought that online learning was better than or equal to on-campus learning; 64% of remote learners felt this way, too.

Introduction

PROJECT GOALS

BestColleges' research initiatives seek to identify and track long-term trends related to online education. In 2020, in addition to the annual Online Education Trends Report, we published separate reports related to online student demographics, college career and employment planning, and gender differences in online education.

This seventh annual Online Education Trends Report, which provides both student and school administrator perspectives, offers the most current view of online education, including a look at remote learning experienced in the wake of COVID-19. The 2021 report presents our fifth year of original data collection from 366 school administrators and 1,800 students. This year's student participants included online students, remote learners, graduates of online programs, and prospective online students. Our findings are organized into four categories:

- The Learning Experience
- Marketing and Recruitment
- Program Design and Administration
- Student Satisfaction

METHODOLOGY

Data Collection

Two online surveys were conducted in October and November 2020. All data are self-reported.

For the first survey, our outreach team connected with schools offering online courses, as reported by the Integrated Postsecondary Education Data System. Representatives from public and private two- and four-year institutions provided feedback via the SurveyMonkey platform. This year, 366 school administrators responded to questions about online program design and administration, student support needs, and the impact of COVID-19 on their work and higher education in general.

The second survey collected information from college students. This year we reached 1,800 participants, representing current remote and online learners, prospective online students, and online degree program graduates. These participants responded to questions about their learning experience, motivation and expectations, and overall satisfaction. Student respondents were fielded by Lucid LLC.

Definitions

Many schools and students experienced distance learning in 2020 due to campus closures caused by the coronavirus outbreak. While some had prior experience with the format, others were new to virtual learning environments. We asked school administrators and students to provide feedback about their year in education in terms of *remote* and *online* experiences. For the purposes of this study, we provided the following definitions:

Online Student: A student who chose or chooses an online program over an on-campus program, enrolling in a program that was designed for online delivery.

Online Courses and Programs: Courses and programs designed to be delivered online and take place predominantly online with no required face-to-face sessions, but may incorporate on-site activities, such as residencies, fieldwork, and practicum requirements.

Remote Student: A student who enrolled in an on-campus program but is taking all or some classes online because they are not offered in person due to COVID-19 restrictions to campus attendance.

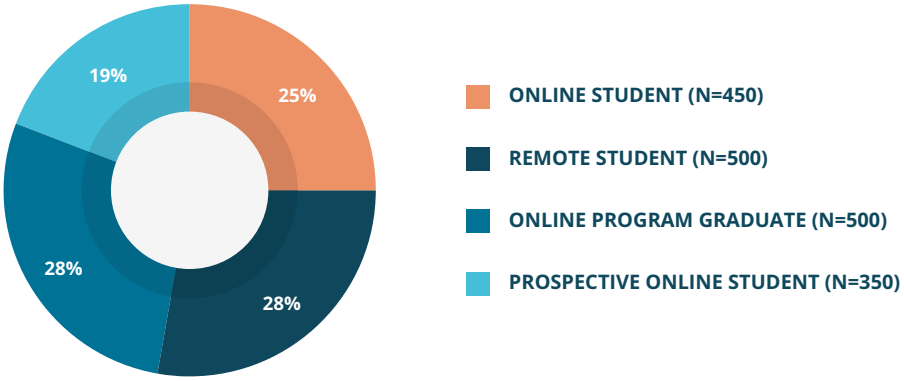
Remote Learning Courses and Programs: Courses and programs designed to be delivered in person but were moved to virtual learning environments when campuses closed due to COVID-19 restrictions.

PARTICIPANTS

Students

Each of the 1,800 student participants self-identified as belonging to one of four categories: currently enrolled online, currently enrolled remotely, graduate of an online program, or prospective online student.

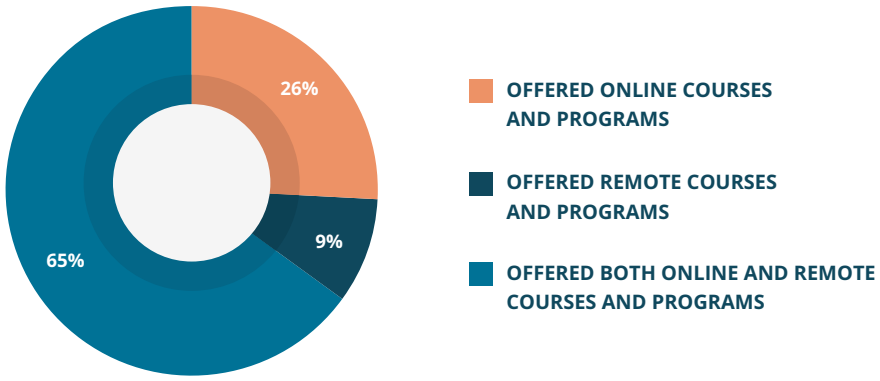
Student Types (n=1,800)



School Administrators

All 366 participants were screened with a question to ascertain whether or not their institution offered online and/or remote courses and programs in 2020. A majority (65%) indicated that their institutions offered both formats.

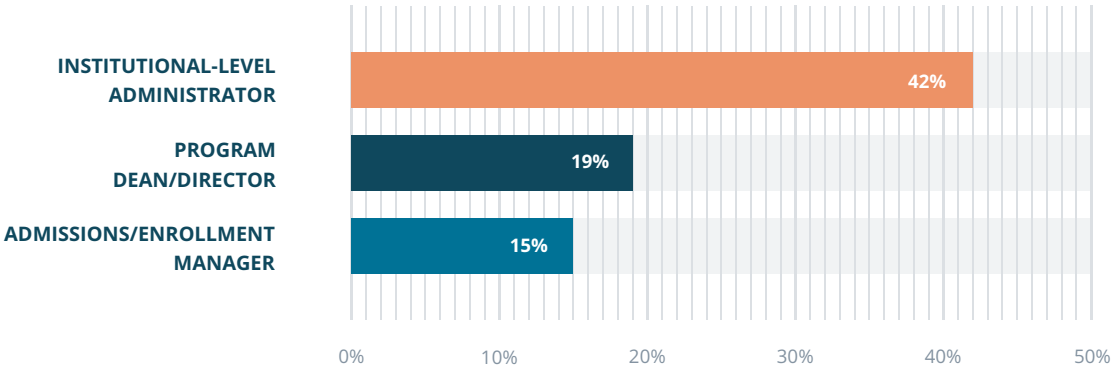
Remote and Online Offerings (n=366)



This year, 300 participants responded to our question related to offering online courses and programs prior to the COVID-19 outbreak. A majority (88%, n=264) indicated that their institutions offered online courses or programs before the switch to virtual learning environments due to COVID-19.

Many school administrators serve in multiple roles at their institutions. Out of 366 participants, 166 identified their primary role. The top three roles were institutional-level administrator, program dean/director, and admissions/enrollment manager.

School Administrator Roles (n=166)



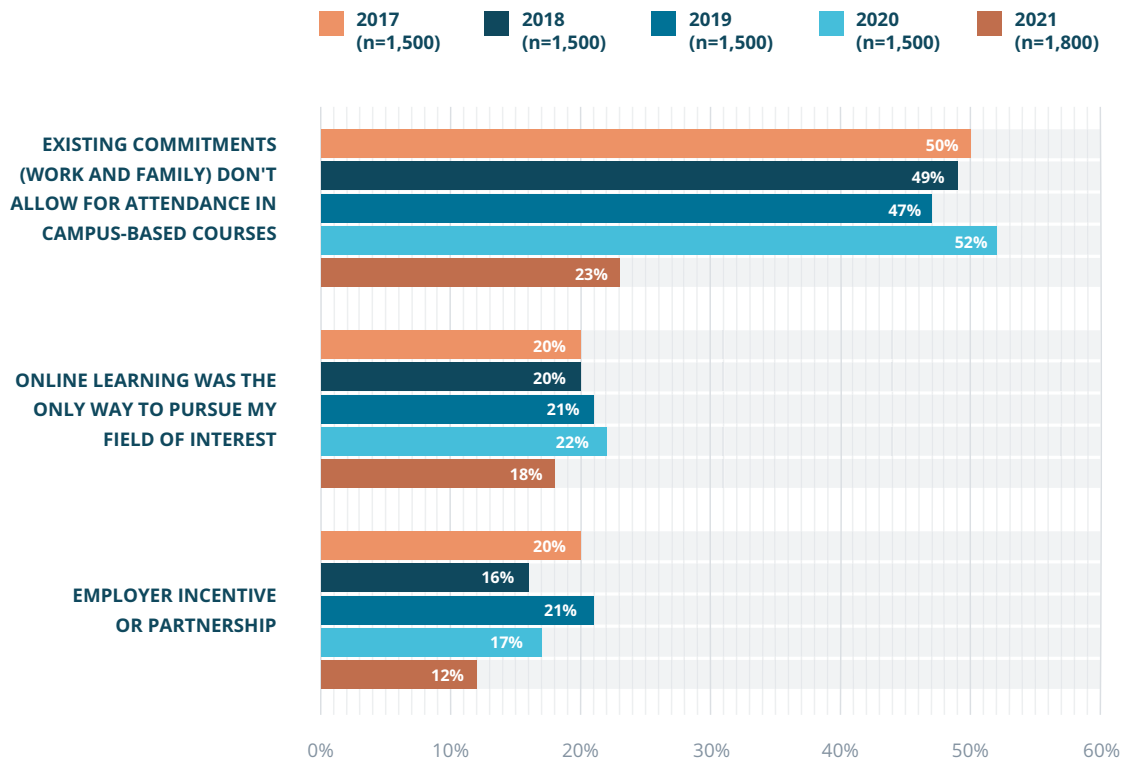
The Learning Experience

The college experience changed considerably in 2020. While many students were already enrolled in online programs or courses, some experienced distance education for the first time. We explored what motivated students to pursue their education online and the challenges they face or faced trying to reach graduation.

CHOOSING ONLINE VS. ON-CAMPUS PROGRAMS

Students are motivated to choose online degree programs for many reasons. In 2020, these reasons included COVID-19, perhaps due to some uncertainty about when traditional campus-based operations would resume. More than one-third (37%) of student participants said that COVID-19 was the reason they enrolled online. Convenience, however, was still a strong motivator for online students overall. Almost one-quarter (23%) of participants cited a need to schedule studying around existing commitments, such as work or family obligations.

Reasons for Choosing Online Learning Options - By Report Year



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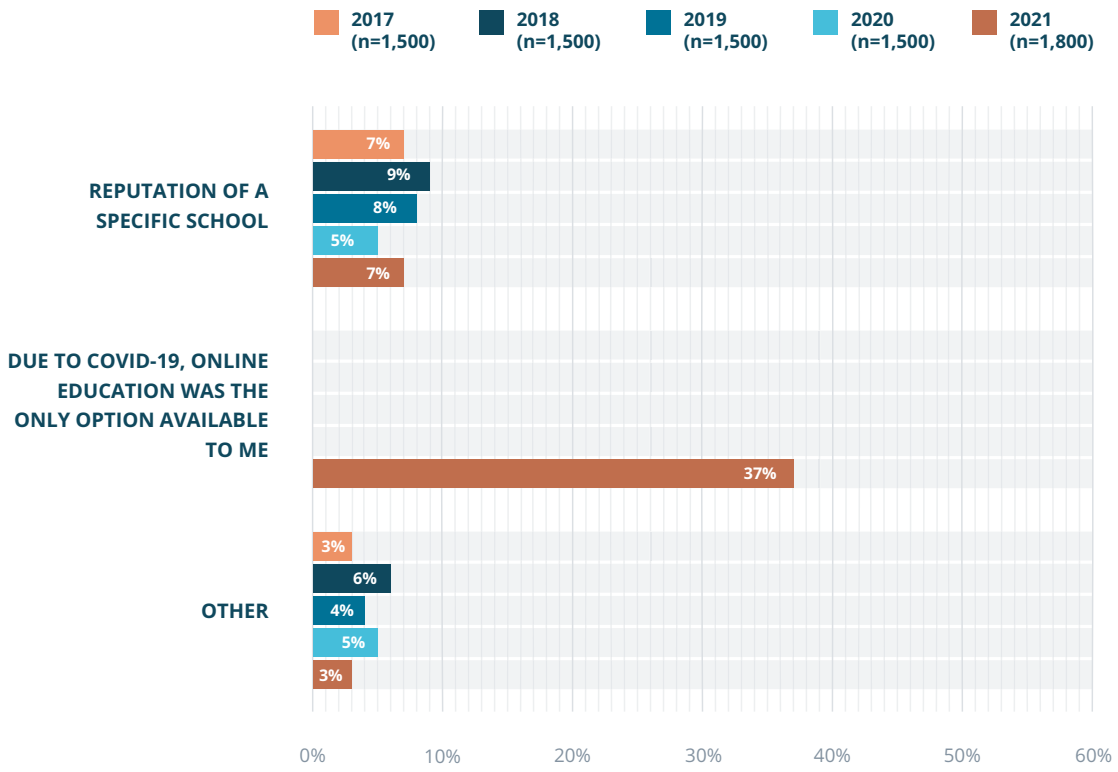
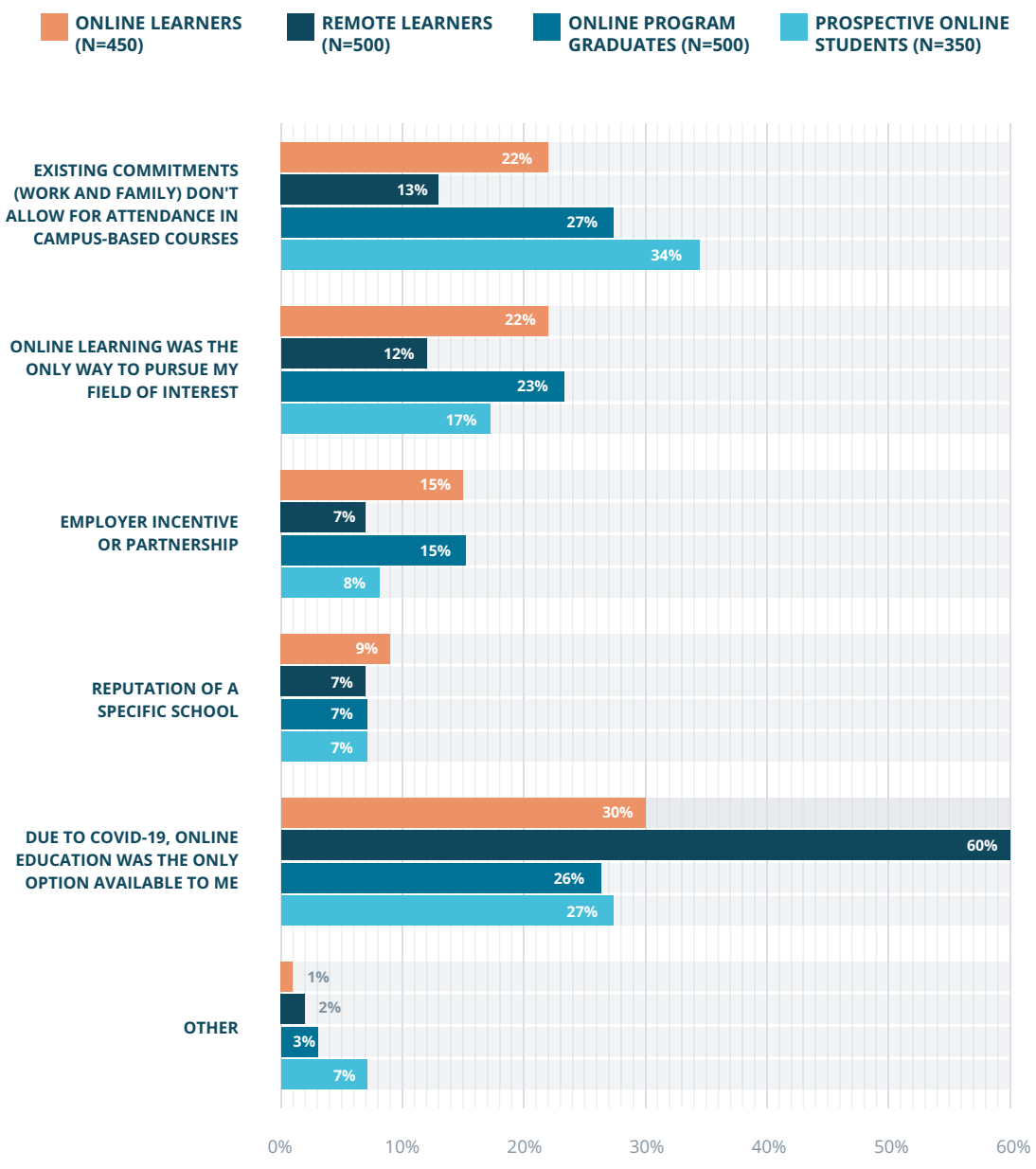
Reasons for Choosing Online Learning Options - By Report Year (Continued)



When we look at this year's participants by student category (online, remote, graduated, and prospective), we find that many learners reported choosing an online program because of the coronavirus outbreak. COVID-19 was by far the top motivator for choosing an online format among both online students (30%) and remote learners (60%), whereas the top motivator for prospective students (34%) and online program graduates (27%) was related to flexibility and convenience.

Reasons for Choosing Online Learning Options - By Student Category in 2021



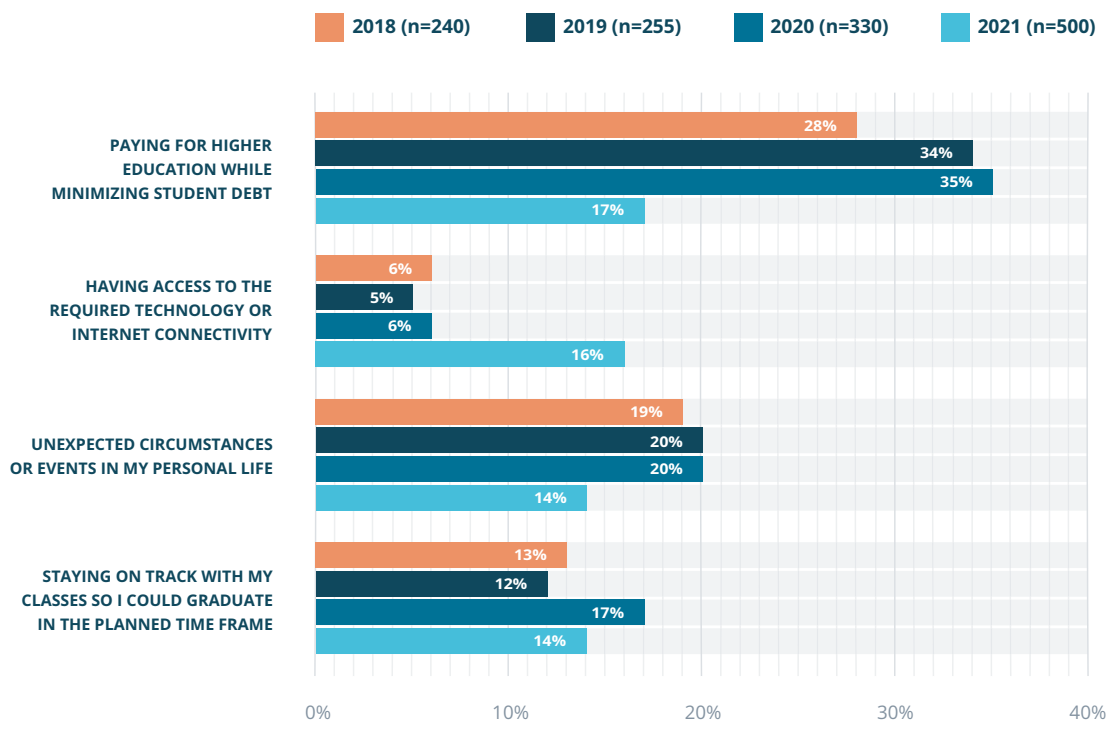
CHALLENGES TO REACHING GRADUATION

Deciding to enroll in an online program is just the beginning. As students add academic responsibilities to their already busy lives as employees (65% of online students were employed at the time of this study) and parents (65% of online students have children), multiple challenges can stand in the way of their success. We asked students and school administrators with online teaching experience to share their insights about potential roadblocks.

Student Perspective

Students who successfully completed an online degree program provide a helpful perspective, as they can reflect on their entire journey from enrollment to graduation. This year, the top challenges reported by this group were *paying for higher education while minimizing student debt* (17%) and *having access to required technology or internet connectivity* (16%). While finances were still the primary concern, the number of students reporting this as a challenge decreased from last year's high of 35%.

Top Roadblocks to Completing an Online Program (Program Graduate Responses Only)



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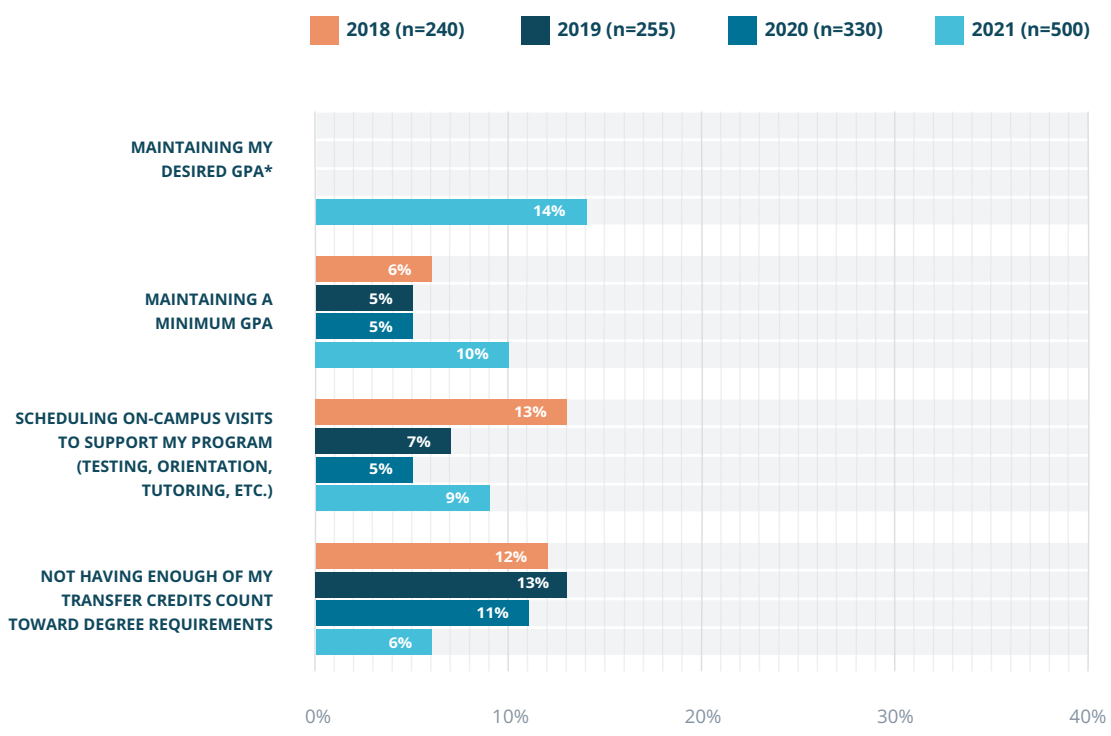
Top Roadblocks to Completing an Online Program (Program Graduate Responses Only) (Continued)

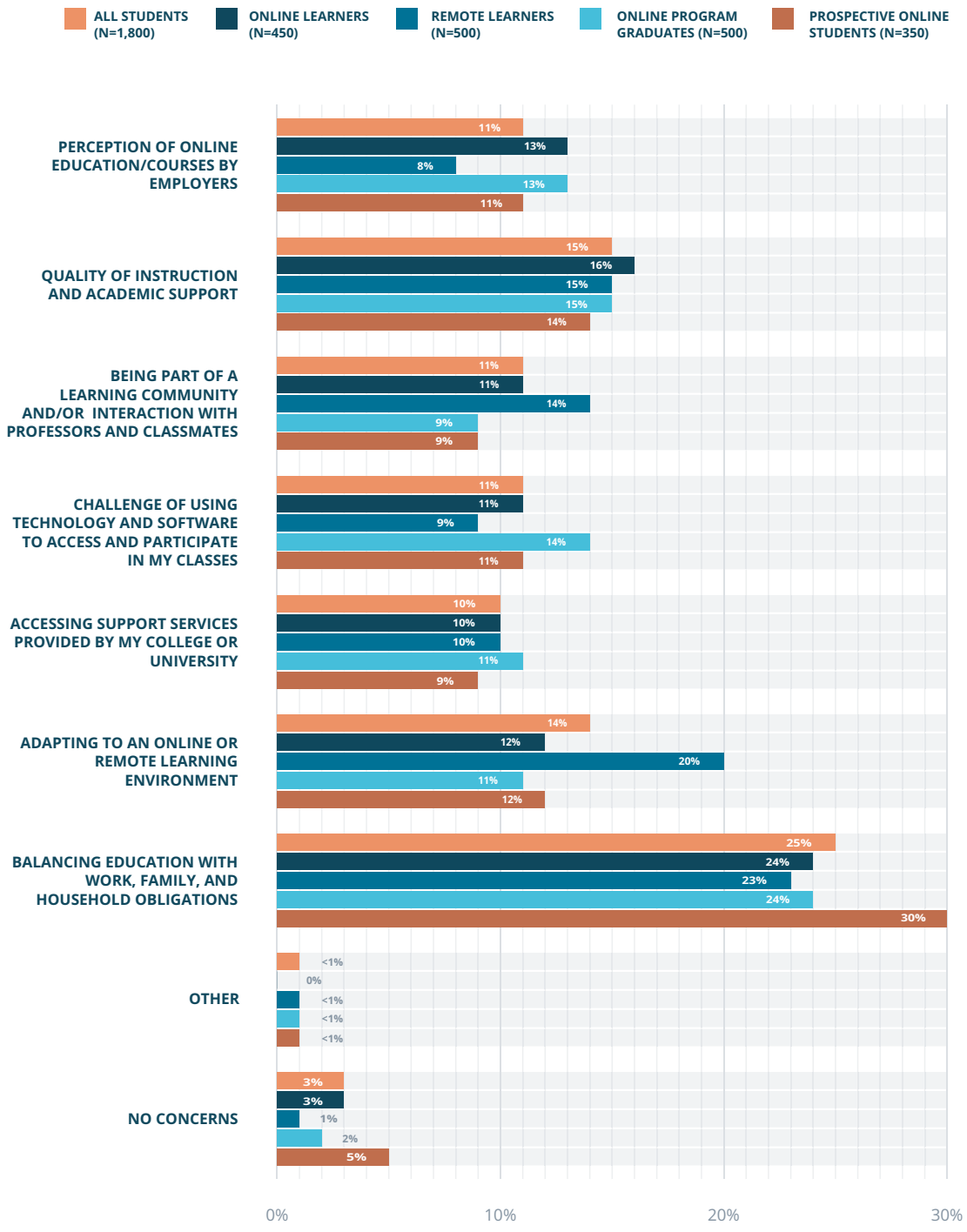


*New response option added in 2021

A new response item, *maintaining my desired GPA*, was identified as a top roadblock by 14% of our participants. These students might have been progressing satisfactorily toward graduation, but not meeting their own expectations for academic achievement.

After several years of low numbers of students reporting technology as a roadblock to reaching graduation, this emerged as a primary challenge for graduates this year. Interestingly, remote students were the least likely to select *having access to the required technology or internet connectivity* as their biggest challenge to reaching graduation. Of the 225 students who reported technology and internet connectivity as their top roadblock this year, only 20% were remote learners. Additionally, 76% of this group were under 45 years old, and 86% had previous college experience.

Biggest Concerns About the Remote/Online Learning Experience (n=1,800)



Remote learners were the most concerned about adapting to a virtual learning environment (20%); however, they were less likely than online students to be concerned about an employer's perception of online education (8% vs. 13%).

BESTCOLLEGES INSIGHT

One-Size-Fits-All Services May Leave Some Students Behind

While remote learners participating in this study reported fewer than expected challenges with technology, the digital divide revealed by widespread campus closures and an abrupt switch to virtual learning environments should not be ignored. The students participating in our study may see some challenges as temporary and anticipate a return to normal campus operations in 2021.

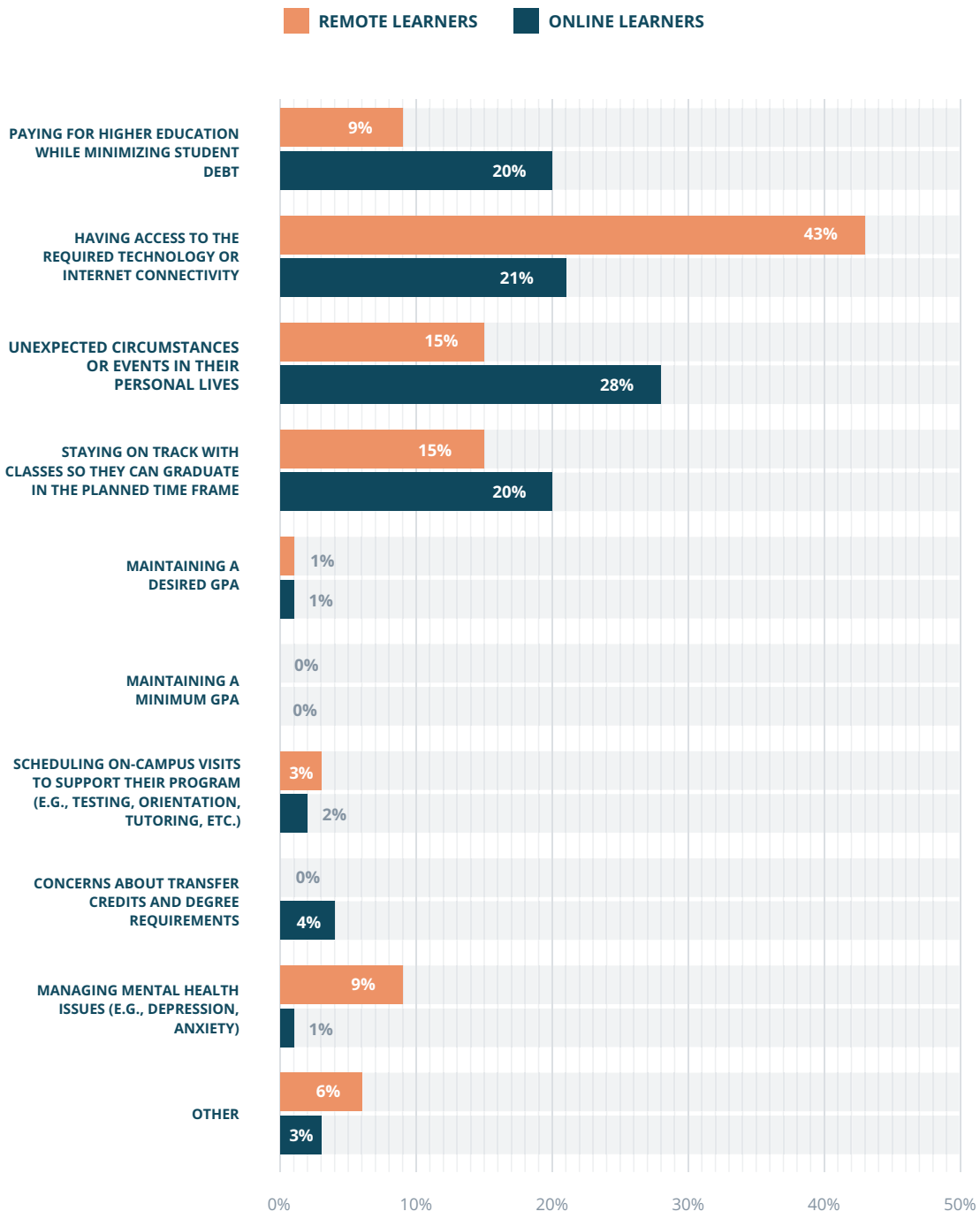
The biggest issue for all students appears to be balancing their academic and nonacademic obligations. Institutions can potentially do more to help students plan for and implement the support they need to complete their academic programs while fulfilling other work and life roles, understanding that each student brings their own combination of needs to the virtual learning environment.

School Perspective

The school perspective is also helpful when considering the challenges students have while enrolled in their online and remote classes. Administrators were asked to share their thoughts about areas in which the remote and online students at their institutions struggle.

Overall, remote and online learners were perceived as having the same primary challenges — access to technology, staying on track to graduate on time, and dealing with unexpected life events — but to varying degrees. That said, these areas didn't necessarily align with the feedback from students about their challenges. Students appeared to be more concerned with academic achievement and finances.

Challenges Faced by Remote and Online Students - School Perspective (n=163)



BESTCOLLEGES INSIGHT

Invite Student Participation in the Planning Process to Avoid Resource Misalignment

How does your institution assess student challenges? Every institution's and every program's student population is unique. Student input can enhance decision-making and help avoid assumptions that lead to the misalignment of resources that are likely already limited. This input could come from many directions, including student participation in committees, student leadership organizations, focus groups, and end-of-term evaluations.

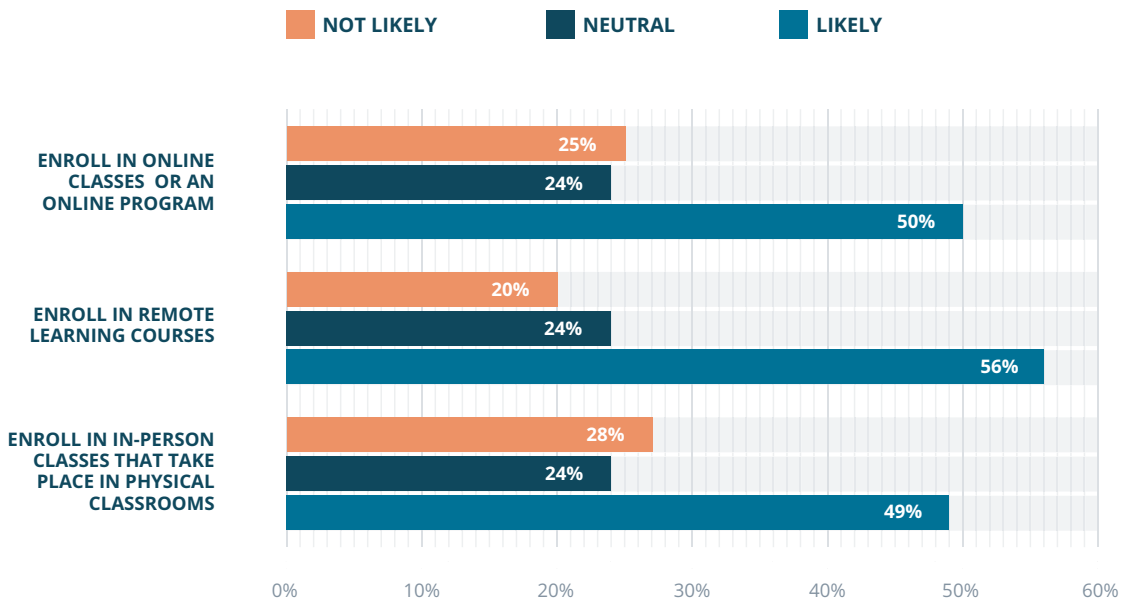
REMOTE LEARNERS

This year, we were particularly interested in getting feedback from remote learners — that is, those who unexpectedly found themselves in virtual learning environments due to campus closures amid the coronavirus outbreak. These students did not necessarily choose to learn online, so how did this experience affect their future enrollment decisions? And how did they think their experiences would impact their lives moving forward?

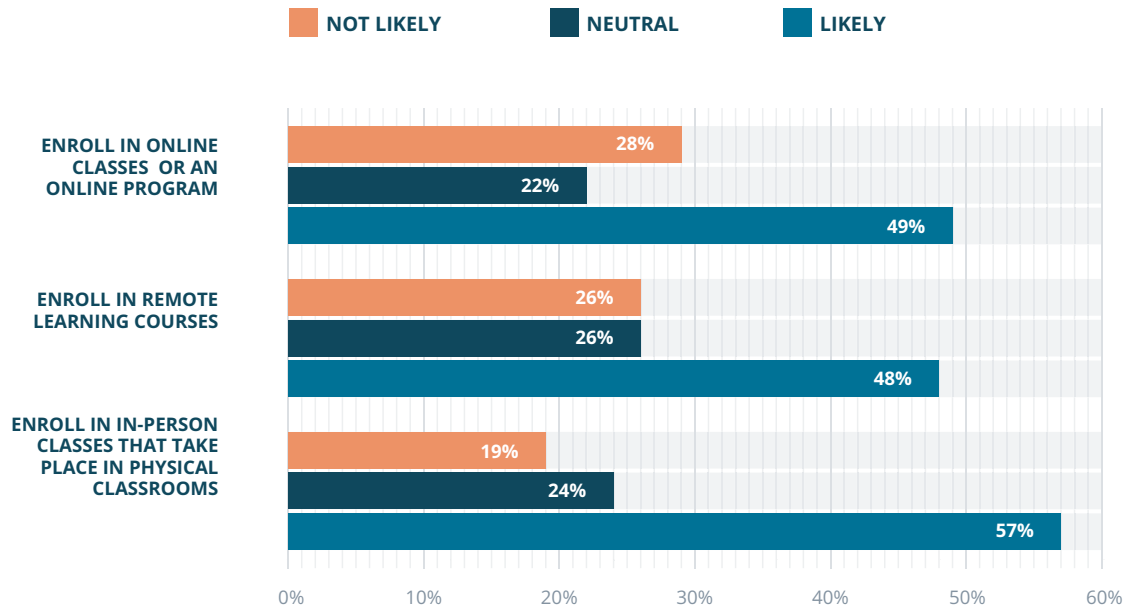
We asked remote learner participants (n=500) to share how likely they would be to enroll in different course formats next semester (which would have been the spring 2021 semester at the time of this survey) and after their schools return to normal operations, though the timeline for that might not have been known. About half of remote learners expected to learn either online (50%) or remotely (56%) in the spring.

These numbers were slightly lower when asked about enrollment after returning to normal campus operations. Almost half were likely to engage in online (49%) and/or remote (48%) learning, while a majority (57%) were likely to enroll in in-person options at that time.

Remote Student Plans for Enrollment - Next Semester (Spring 2021) (n=500)



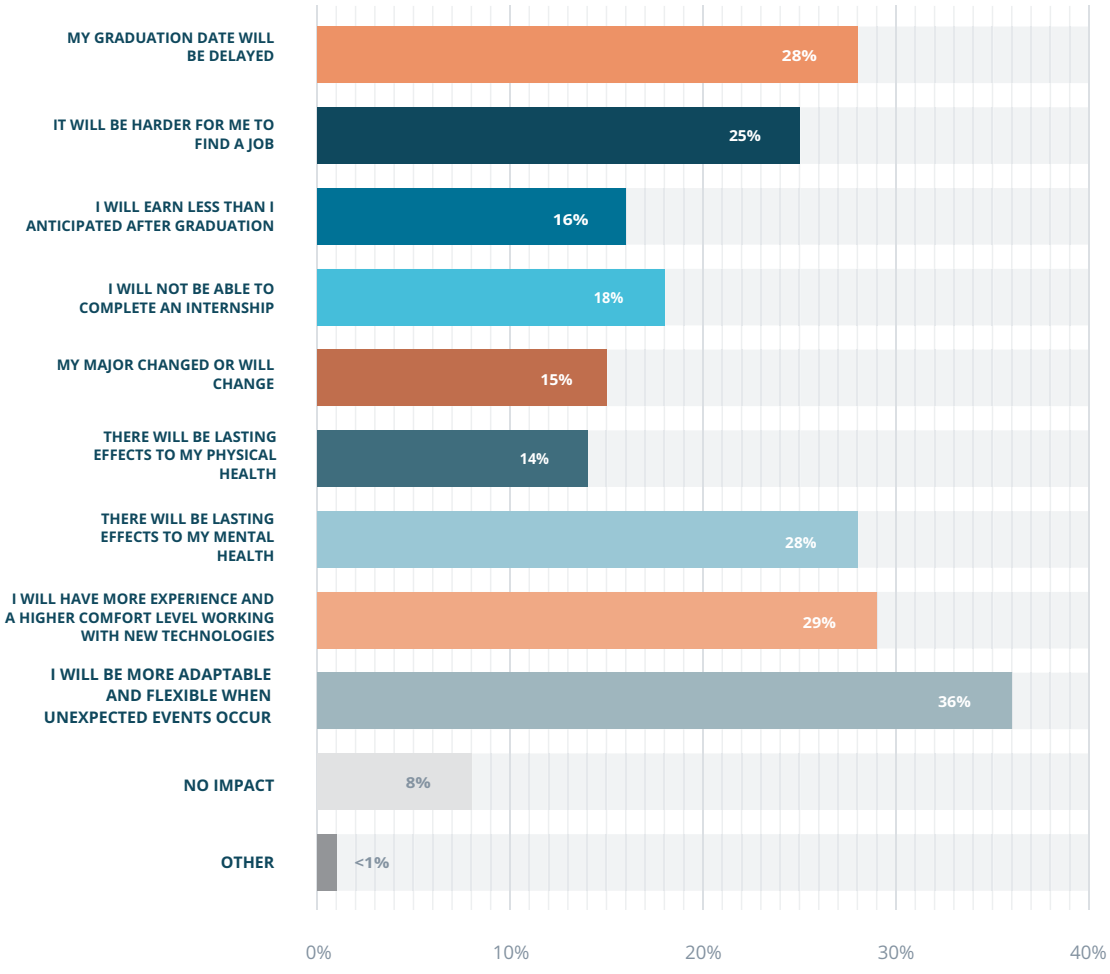
Remote Student Plans for Enrollment - After Campuses Return to Normal Operations (n=500)



These findings suggest an openness to virtual learning, or an acceptance of the increased need for virtual learning in the future. Today's remote students may be more interested in and willing to enroll in online programs later on, such as for graduate school, certificate programs, and other continuing education opportunities. While many students said they would return to in-person classes, more seemed to display an inclination to enroll in a variety of class formats during an academic term.

Remote students also shared interesting insights about how their college experiences this year may affect various aspects of their lives in the future, from when they will graduate to lasting effects on their health and well-being. More than one-third (36%) of remote learners said that *[they] will be more adaptable and flexible when unexpected events occur*. Additionally, nearly 3 in 10 (29%) said that *[they] will have more experience and a higher comfort level working with new technologies*.

Impact of COVID-19-related College Changes on Your Future - Remote Students (n=500)



Troubling responses were also related to the potential long-term impact on remote learners' mental health. While concerns about college student health and wellness are not new, they are likely intensifying due to COVID-19. Remote learners also shared concerns about being able to graduate within their expected timeline (28%), and one-fourth (25%) believed it will be harder to find a job after graduation.

Marketing and Recruitment

At the time of this report, traditional higher education institutions are still in flux as a result of the coronavirus outbreak and the related impact on the college learning environment and campus experience (The Chronicle of Higher Education, 2020). Many students are also unsure about how to proceed with their education (Nadworny, 2020). Indeed, it's more complicated than it's ever been for students to make decisions about their academic future.

This year we continued to explore motivations for online enrollment, as well as how students research and compare programs, with the added perspective of remote learners. Having an awareness of what motivates students to enroll, their concerns about the process, and the information they're using to make their decisions can help inform the strategies used by professionals in marketing and recruitment roles.

STUDENT MOTIVATION TO ENROLL

As in past years, we continue to use Ladd, Reynolds, and Selingo's (n.d.) work to frame our categorization of student characteristics beyond the age-based labels of *traditional* and *nontraditional*. Our focus on motivation to enroll centers on career-minded students, lifelong learners, and recent high school graduates.

We also added a category this year to capture the feedback of remote learners — those students who were enrolled online at the time of the survey not by choice, but due to the impact of COVID-19 on the delivery of their college courses.

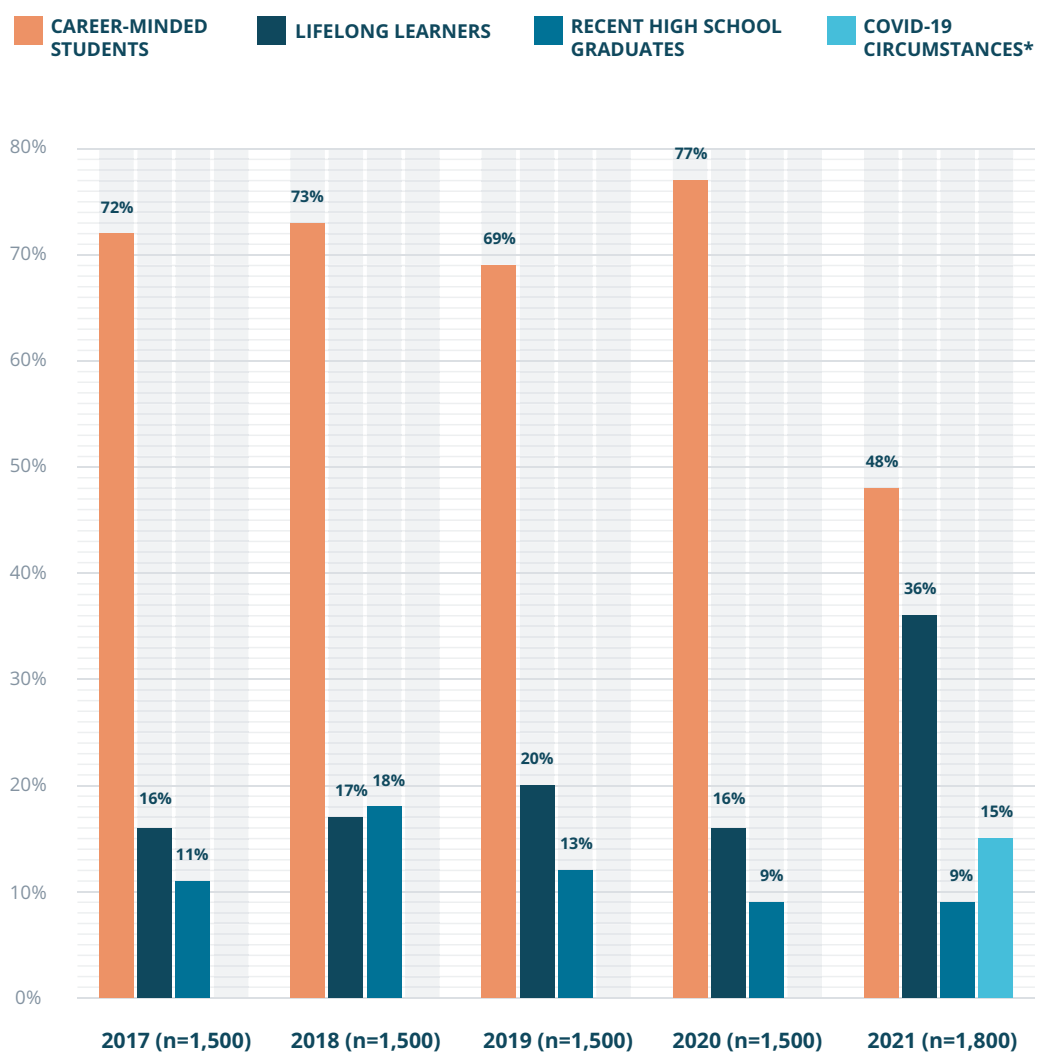
College Student Characteristics and Motivations to Enroll Online

CATEGORY	STUDENT SEGMENT	DESCRIPTION
RECENT HIGH SCHOOL GRADUATES	ASPIRING ACADEMICS*	18-to-24-year-olds focused on academic studies
	COMING OF AGE*	18-to-24-year-olds exploring college academics, social offerings, and a variety of activities
LIFELONG LEARNERS	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-MINDED STUDENTS	CAREER STARTERS*	Wide 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
COVID-19 CIRCUMSTANCES	REMOTE LEARNERS	Circumstances related to COVID-19 led to pursuing new programs online

*Based on Ladd, Reynolds, and Selingo, n.d.

Career-minded students made up almost half (48%) of our survey participants. While still the largest group of learners, this number was down from the previous year, when a majority (77%) of career-minded students participated. Additionally, 15% of those surveyed this year indicated that one of their motivations to enroll online was that circumstances due to the COVID-19 pandemic led them to pursue a new program.

Characteristics and Goals of Online Students - By Report Year



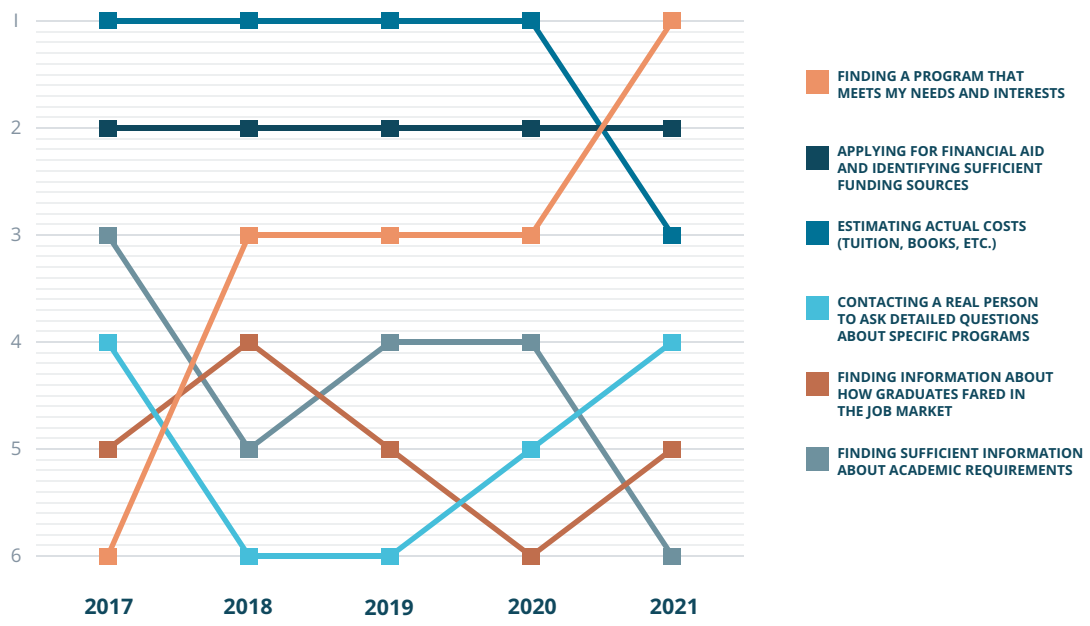
*New response option added in 2021

STUDENT RESEARCH AND DECISION-MAKING

With a growing number of online programs to choose from, the college selection process can be overwhelming for students, who don't always have all the information they need to make the best decisions. Though the top three challenges reported by students when it comes to choosing an online program haven't changed in the past four years, this year witnessed a flip in how students ranked these obstacles.

For this year's report, the top challenges to online college decision-making were *finding a program that meets my needs and interests* (20%), *applying for financial aid and identifying sufficient funding sources* (18%), and *estimating actual costs* (17%).

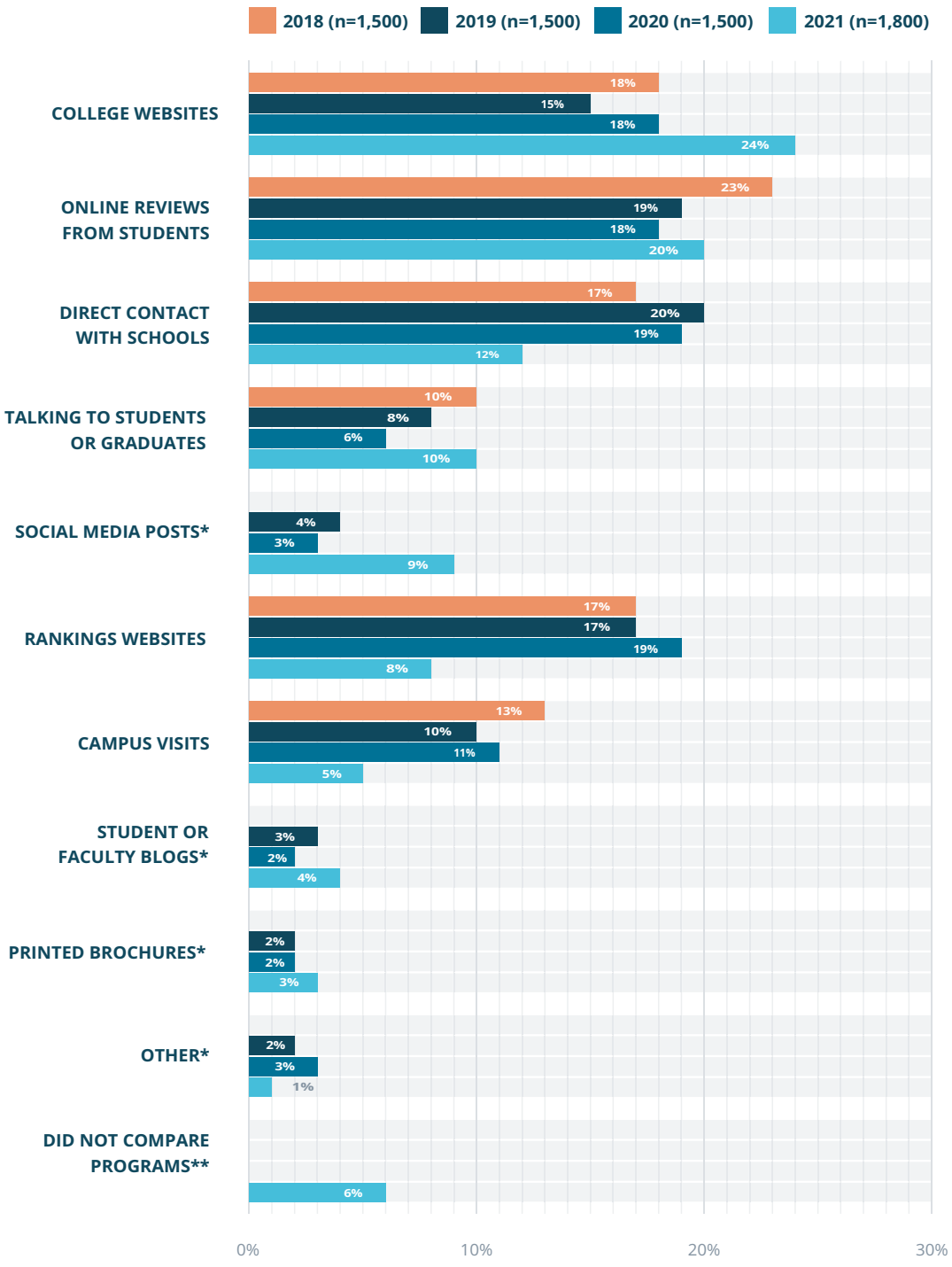
Biggest Challenges Students Face When Choosing an Online Program - By Report Year



For the first time since conducting our initial surveys in 2016, *finding a program that meets my needs and interests* emerged as the biggest challenge for student participants. This may be a result of several factors, such as the growing number of online programs available, demand for something that isn't available, or difficulty locating needed information.

When we asked participants what sources they relied on to research and compare programs, responses show how their primary resources have evolved over the years.

Sources of Student Research and Program Comparison - By Report Year



*New response option added in 2019

**New response option added in 2021

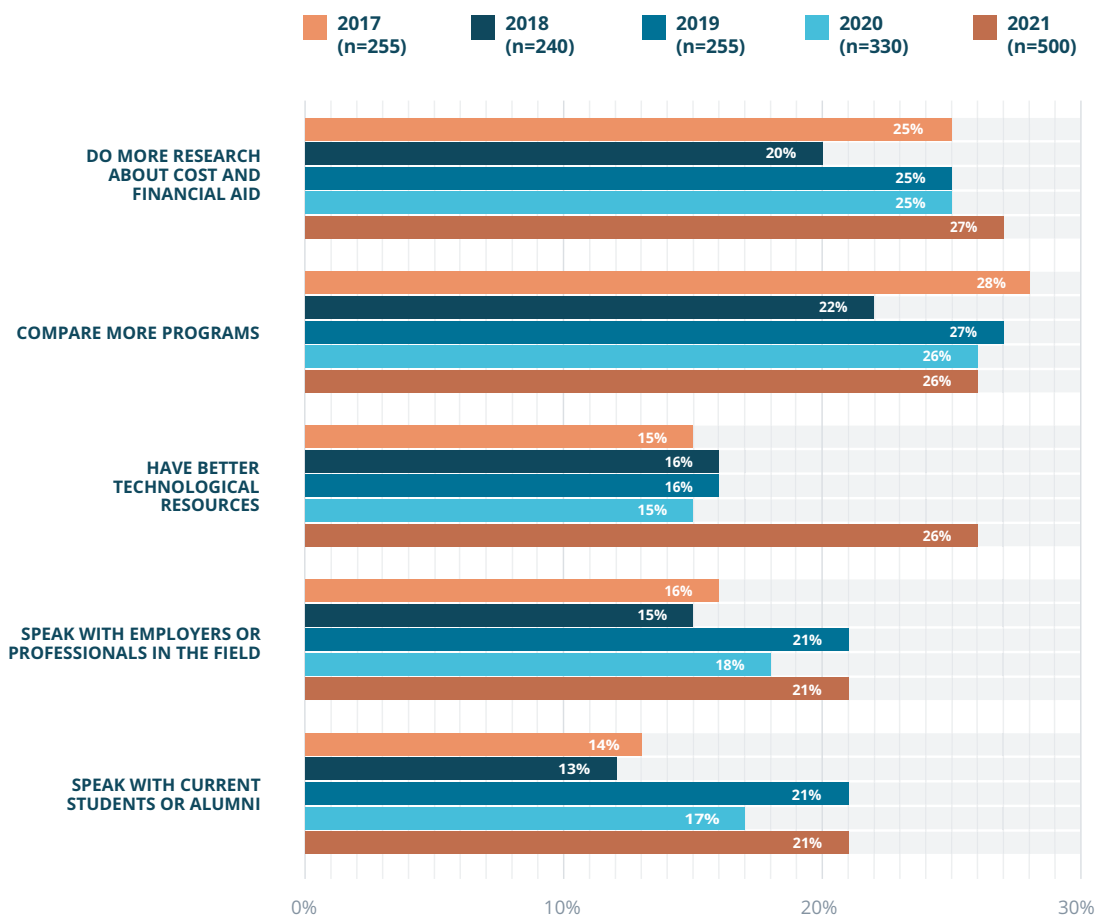
The top two sources of information reported this year were *college websites* (24%) and *online reviews from students* (20%). Understandably, *campus visits* as a research method fell sharply this year due to COVID-19-related school closures — only 5% of participants reported visiting colleges. Reliance on *rankings websites* (8%) and *direct contact with schools* (12%) also declined from previous years. Interestingly, more students relied on social media to find out about schools and programs: 9% in 2021 compared to just 3% in 2020 and 4% in 2019.

ADVICE FROM ONLINE GRADUATES

Many graduates would do something differently if they could go back and make their decisions about college again. Overall, this group's biggest regrets and lessons learned related to finances. Once again, online program graduates wished they had *[done] more research about cost and financial aid* (27%) and *compare[d] more programs* (26%).

This year, however, responses of *hav[ing] better technological resources* increased. This option was reported by more than one-quarter (26%) of graduates this year, but only 15% in 2020.

What Online Graduates Would Do Differently When Choosing an Online Program - By Report Year



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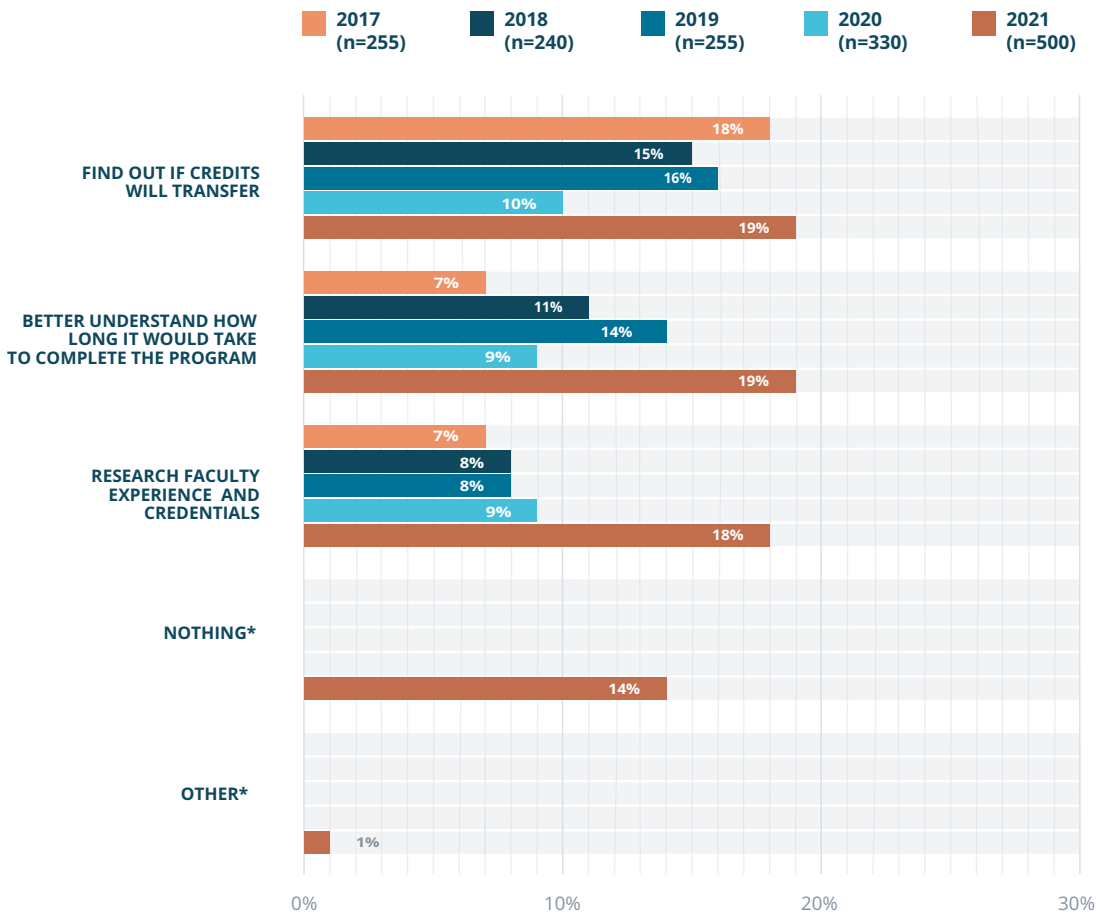
What Online Graduates Would Do Differently When Choosing an Online Program - By Report Year (Continued)



*New response option added in 2021

When we look at responses from other student categories, those currently enrolled in online programs wished they had *better under[stood] how long it would take to complete the program* (27%) and talked to more people about the program and their plans, i.e., talked to *current students or alumni* (25%) and *employers or professionals in the field* (24%).

BESTCOLLEGES INSIGHT

Provide Easy Access to the Information Students Want and Need

What information and resources do students encounter when they look for information about online program costs and funding? What happens when they contact your school or program directly or follow your school's social media accounts? Consider the many potential modes of communication available to prospective students. Provide access to their areas of interest — finances, how programs compare, why your program may be a good fit — and opportunities to connect with school representatives for more information. It is also important to be aware of what your current and prior students are posting on review sites, such as GradReports, Cappex, and Unigo.

Program Design and Administration

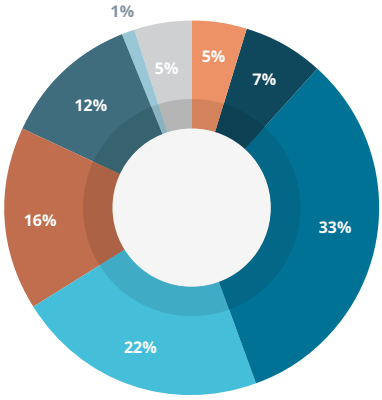
Last year, we saw colleges and universities across the globe make an unprecedented shift to remote and online learning as campuses closed in the wake of the COVID-19 outbreak. This shift was not only quick but has also lasted longer than might have been expected initially. We asked school administration participants to share details about the ongoing impact of this transition on their faculty and students, the lessons they've learned from the experience, and their predictions for the future of higher education.

IMPACT OF COVID-19

Institutional leaders continue to face tough decisions about reopening campuses and providing online learning options. Many administrators (n=302) shared insights about how their institutions were planning to move forward once they are able to resume normal operations.

One-third (33%) planned to continue both remote and online course options for students, while 22% said their schools will pursue more online options in the future. As of our November 2020 survey of school administrators, 12% weren't sure how their schools would proceed.

Plans for Remote and Online Learning Formats Upon Return to Normal Operations (n=302)



- WE WILL CONTINUE TO OFFER THE REMOTE LEARNING OPTIONS THAT BEGAN DURING THE COVID-19 OUTBREAK
- WE WILL FURTHER DEVELOP REMOTE LEARNING OPTIONS INTO ONLINE OPTIONS
- WE WILL CONTINUE WITH BOTH REMOTE AND ONLINE OPTIONS FOR STUDENTS
- WE WILL PURSUE MORE ONLINE OPTIONS IN THE FUTURE
- WE WILL REMOVE THE REMOTE OPTIONS THAT BEGAN DURING THE COVID-19 OUTBREAK AND RETURN TO ON-CAMPUS CLASSES
- NOT SURE
- WE DID NOT OFFER REMOTE OPTIONS DURING THE COVID-19 OUTBREAK
- OTHER

We asked administrators to respond to two open-ended questions related to what they have learned from their experiences while adjusting to changes related to COVID-19 at their institutions. The first question asked them to share details about the potential impact of the pandemic on their own work, while the second asked them to address the potential impact on higher education overall.

IMPACT ON INDIVIDUAL WORK

Responses from participants (n=182) revealed several major themes related to what was learned from the changes they experienced in their work due to COVID-19. These themes cover a variety of topics, reflecting the scope of work required to successfully offer and support effective learning opportunities at a distance. While the responses were more focused on positive outcomes, some limitations were also noted.

Faculty Preparedness

More than one-fourth (26%) of participants indicated the need to help faculty members develop their online teaching and technology skills through formal training and other preparation activities. Additionally, many felt that the emergency shift to teaching online in 2020 gave reluctant faculty the opportunity to experience an online learning environment firsthand, resulting in increased acceptance of this method of instruction.

Selected responses:

- “After experiencing remote learning, faculty are more interested in quality online learning.”
- “[We should] continue to push for all faculty to have technology training even if the benefit does not seem obvious at first.”
- “More classroom faculty will benefit from professional development in areas related to instructional technologies.”
- “The Faculty, who were originally against putting certain courses online, were surprised at the outcome and will continue to offer some of those courses online.”
- “Instructors and students were sometimes unable to get into an online mindset and expected synchronous sessions and structure similar to face-to-face classes.”
- “Given enough training and support, instructors can make anything work for their students.”

Instructional Design - Process and Resources

Several participants (14%) expressed the need to move forward with the design and development of all courses so that they could be offered in multiple modalities, are of high academic quality, and use sound educational strategies. The importance of planning and ongoing training was emphasized, as was the need to consider an array of formats and student needs.

Selected responses:

- "It's possible to effectively teach online about any course. It's just a matter of good planning and solid teaching and learning foundations."
- "Synchronous online learning may deserve more of a place in the future of distance education at our college, and training needs to shift to accommodate this. Also, quality assurance needs attention."
- "I foresee more space for hybrid learning … experiences that have historically taken place on campus may be translating well to the remote environment and will mostly likely stay there."
- "Students looking for a fully online program do in fact have uniquely different needs than those looking for a fully in-person or hybrid program.

Remote Work

Twelve percent of school administrators shared the realization that they don't need to be in a campus-based office to successfully perform their jobs. Some even found that specific aspects of their work could be carried out more efficiently in a remote setting.

Selected responses:

- "Online meetings and less travel for meetings at the institution will continue to save time and promote efficiency."
- "It is possible to work from home — I expect that in the future, the institution will find ways to be more flexible with employees in regard to this. Also since space is sometimes an issue, I wouldn't be surprised if shared work spaces become a trend on our campus where schedules vary between who works on campus vs. who works from home."
- "Most of the work we do can be done remotely, with the new procedures in place. I will be more attentive to staying home when faced with any illness."
- "Online college services, although housed in the main administration building, could continue providing services remotely, thus saving space and money."
- "Remote meetings for faculty may need to stay; they have better attendance and in some ways discussion is improved."

IMPACT ON HIGHER EDUCATION

Responses from school administrators (n=171) revealed themes related to how higher education overall might change as a result of the COVID-19 outbreak's impact on campus and college operations. Some overlap was found with the responses related to individual work, but feedback also focused on what aspects of the remote experience might be beneficial to continue after campuses fully reopen.

Instructional Design - Process and Resources

Almost half (47%) of respondents shared the need for an industry-wide effort to invest in resources for designing high-quality courses that can be offered in multiple modalities and effectively use available technologies.

Selected responses:

- "More classes can be taught online than faculty thought. This may have opened pathways for our institution."
- "The limitations of online learning are greater than anticipated."
- "The strict division between remote and in-person learning may be gone now."
- "Learning is the focus, not systems."
- "Slow and steady wins the race. While we are building our courses it has been apparent that the student can tell if it's been rushed and not thought out well. The standard for online classes is going to be high and the quality needs to be high. As we move further down the road of online higher education, there will no doubt be more innovative ideas and design templates [becoming] available. I foresee this moving at a fast pace."

Student Support

Almost one-quarter (22%) of participants acknowledged the scope of student support that is required for successful remote and online learning. From access to technology (e.g., broadband internet, hardware) to other services (e.g., advising, counseling, libraries), institutions need to ensure they can adequately support students. Some administrators found that online access to support services during the pandemic was more effective than campus-based offerings prior to the outbreak, and this type of support may even be preferred by many campus-based learners.

Selected responses:

- "Offering the entire suite of college support services online provides a beneficial option for many learners."
- "Equity and access are amplified and we can't hide behind it anymore — we have to face it head on."
- "The post-pandemic online student is different and could include students who prefer a virtual classroom as opposed to an entire asynchronous program."
- "Students not engaged or stopped out. [They] will be missing some skills in the future and will have to be retrained."
- "[We found] new and/or more effective presentations to present the admissions consultation, information sessions, and new student orientations through Zoom."

Adaptability and Flexibility

For many administrators (19%), the COVID-19 outbreak served as a warning shot. Higher education institutions need to be ready for emergencies of any kind, and schools no longer have an excuse for being unprepared. Several administrators called for the development of new and/or better contingency plans so they can effectively pivot when needed.

Selected responses:

- "Prior to COVID, we had one remote learning program. We may add more in the future due to the success of this program and our ability to adapt our classes during COVID."
- "We don't ever have to close for any reason. We have the tools to keep going and deliver instruction to students."
- "We were not prepared, but adjusted. I think we will be more prepared to meet a variety of instructional delivery needs in the future."
- "Face-to-face learning and operations are NOT always the only way to offer educational opportunities to students. Also, the faculty is aging and many more of them have health or family issues that need to be accommodated."
- "Flexibility is going to be a large part of all education in the future — the ability to adapt to changes, and the ability to serve students who expect flexibility."
- "[We learned] the profound need to embed flexibility into everything we do."

BESTCOLLEGES INSIGHT

Embrace the Opportunities to Integrate Technology in New Ways

Through the rushed development of virtual learning in 2020, many institutions gained a sense of how applying instructional strategies and tools in different ways can help them reach and support a wider variety of students. There is potential for remote learning as a specific strategy. For example, remote learning could be used to reach students at a distance, while still maintaining traditional approaches related to scheduling and regular interactions with instructors — but with more extensive use of synchronous online tools, such as Zoom, Blackboard Collaborate, and Webex. On-campus students can also benefit from online services. And by embracing remote work, schools can change how resources are allocated so that they better benefit students, faculty, and staff alike.

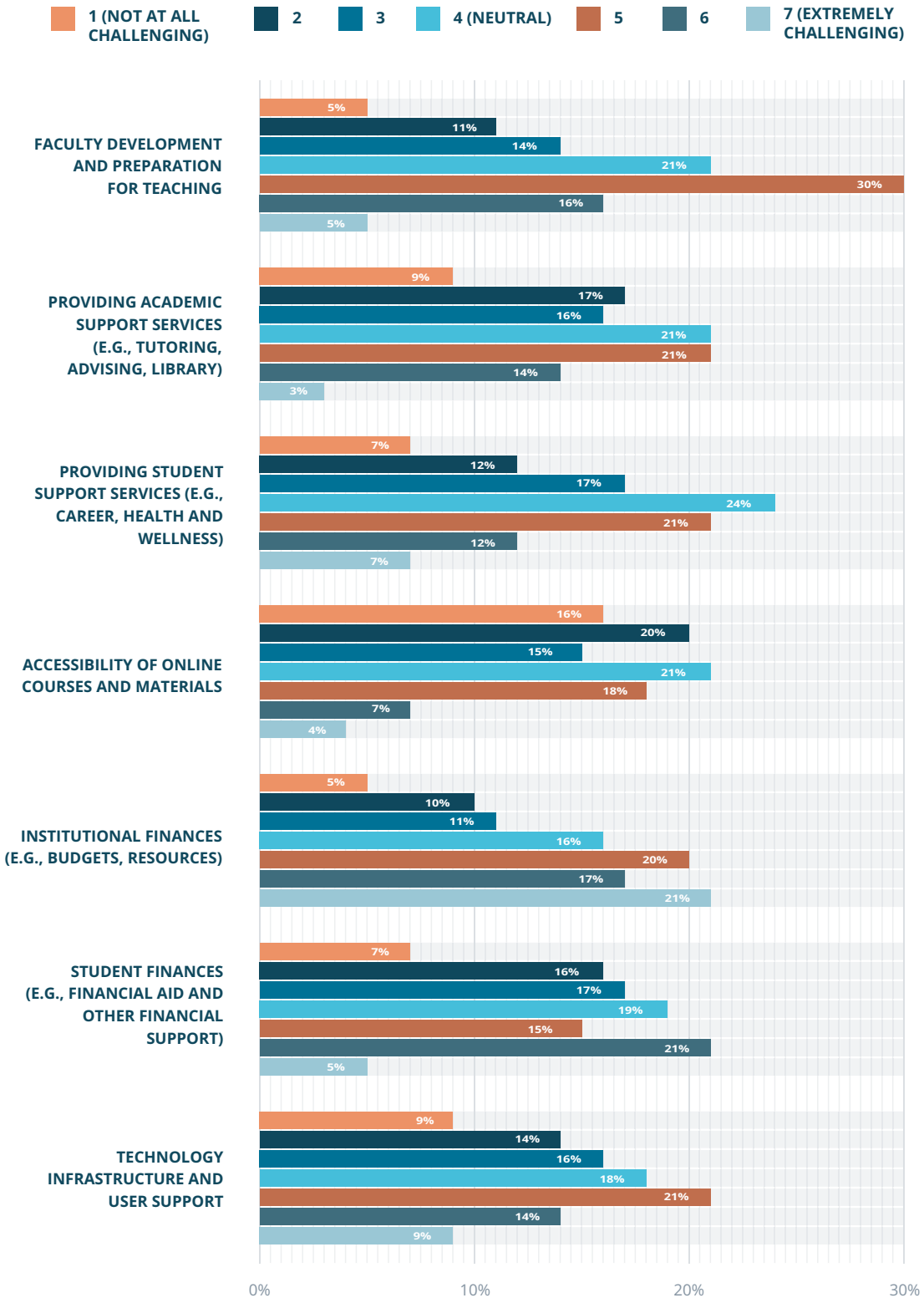
THE FUTURE OF ONLINE EDUCATION

Many aspects of life and work have been impacted by COVID-19, and higher education is no exception. But how will the changes made in 2020 affect the college experience in 2021 and beyond? Administrators shared their expectations for the year ahead, as well as their predictions for future demand.

Preparing for 2021

We asked school administrators (n=211) to provide feedback about the challenges they anticipate in the coming year and how they will prioritize their work. Finances were indicated as a major factor by 58% of respondents, and 21% said this area will be *extremely challenging*. Fifty-one percent also identified faculty development as an obstacle when preparing for remote and online learning delivery in 2021.

Challenges Preparing for Remote and Online Learning in 2021 (n=211)

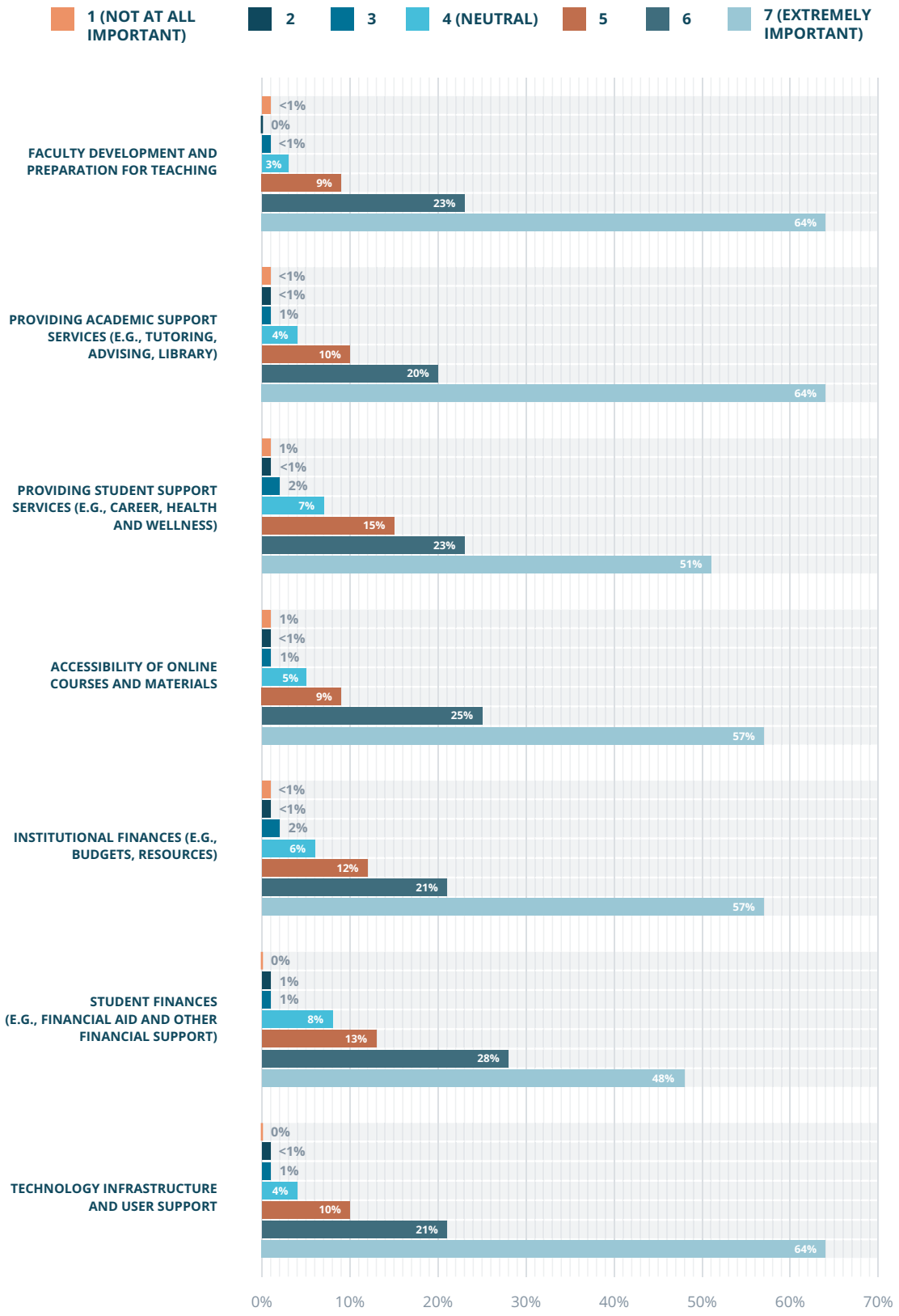


The responses were split in several areas, including how challenging providing technology infrastructure and support would be: 39% said this area would be less challenging and 44% said it would be more challenging. Some schools might have been better prepared at the outset to handle the technical requirements of remote and online education, while others were starting from scratch or working with a smaller set of resources they could not scale quickly.

Making sure online courses and materials were accessible was viewed as less challenging by more than half (51%) of participants. School administrators also considered providing academic support services, such as academic advising and library access, less challenging.

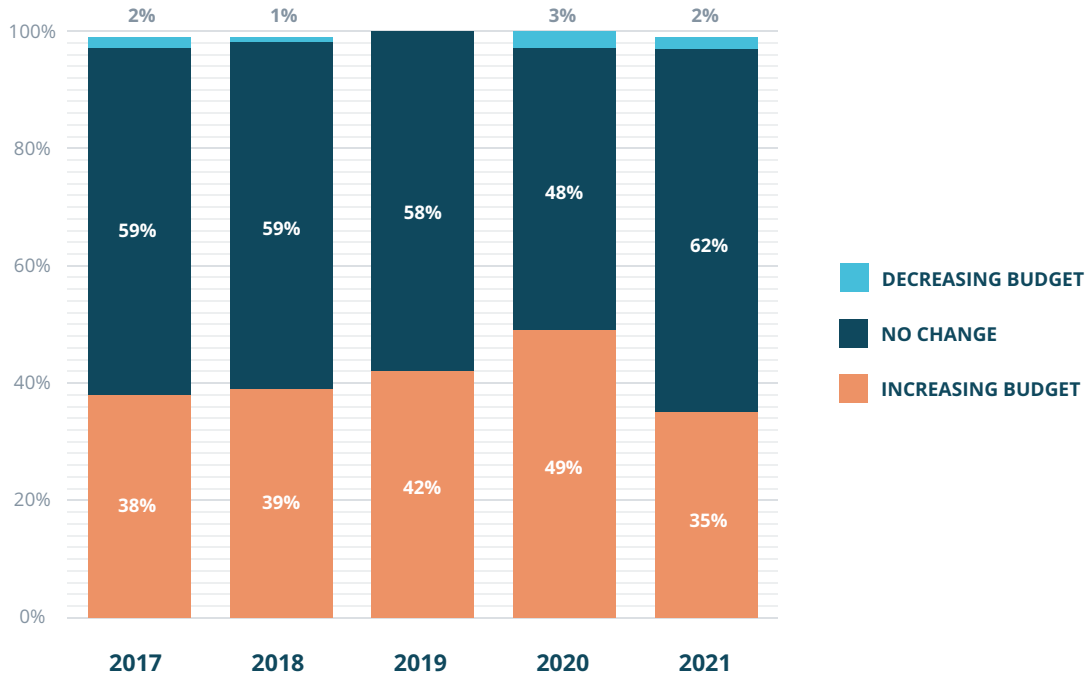
When asked about priorities in 2021, participants sent a clear message that all aspects of preparing for remote and online learning are important. An overwhelming majority of responses indicated the importance of each item, especially those related to faculty development (96%), technology infrastructure and support (95%), and student academic support services (94%). While students have expressed considerable concern about the financial implications of paying for their education, student finances appeared to be a slightly lower priority for administrators.

Priorities for Preparing Remote and Online Learning in 2021 (n=208)



With institutional finances identified as a major challenge by many administrators this year, budgets will likely be reviewed with increased scrutiny. Fewer participants planned to increase their budgets for online and remote learning in 2021, ending a pattern of year-over-year increases since 2017. There seems to be a shift from *increasing budget* to *no change*, as some schools may be holding their financial course to see what happens in the coming semesters regarding the extended impact of COVID-19 and/or the demand for online and remote options.

School Budget Planning for Online Program Development



BESTCOLLEGES INSIGHT

Institutional Financial Decisions Require Careful Prioritization

With finances in question, and a long list of priorities, it will be important for each school to carefully and purposefully move forward with the needs of their specific students, faculty, and staff members in mind. It's unlikely that schools will be able to fully address all priorities simultaneously. Strategic plans may need to be revisited, and strategic planning may become a more frequent exercise at colleges and universities as the pace of changing circumstances and decision-making increases.

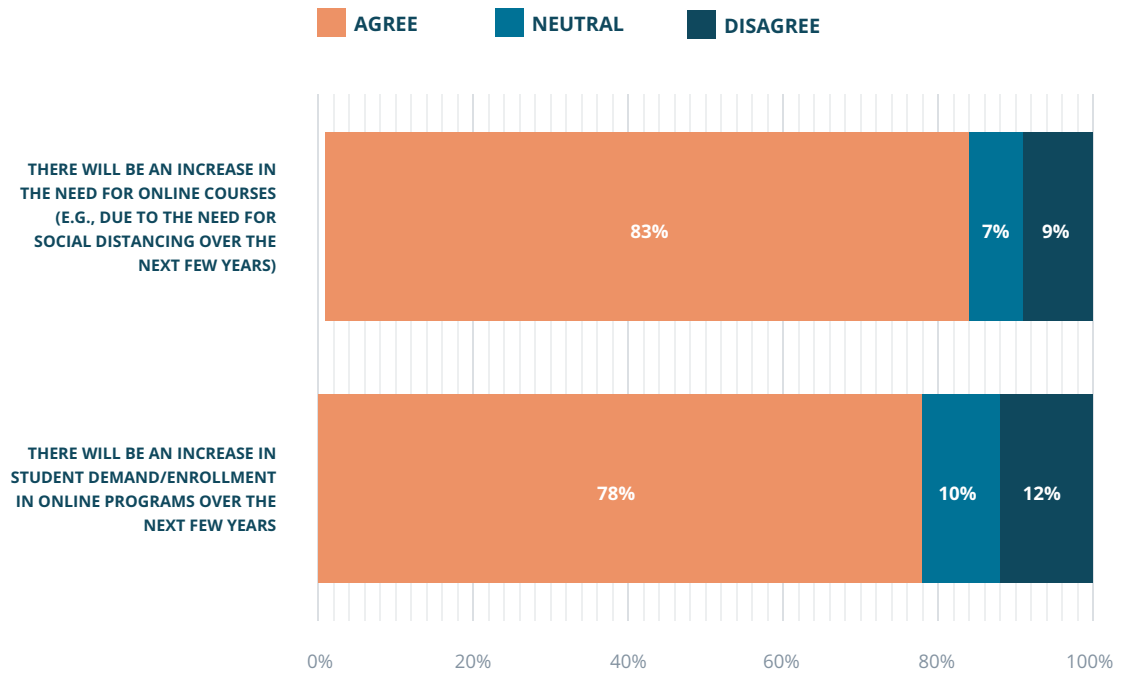
Demand and Majors

The extended nature of remote and online learning in 2020 will no doubt impact schools, faculty, and students in some way and to varying degrees. But will more experience with remote learning increase the demand for courses offered online?

To help shed light on this question, we asked school administrators to make predictions about the demand and growth of certain academic majors. Specifically, we asked participants to address not only general demand for online courses, but also demand related to continued campus closures and adjustments to how physical space might be used (e.g., with regard to measures like social distancing).

A vast majority (83%) said there will be an increase in the need for online courses due to COVID-19-related issues. A slightly smaller majority (78%) of administrators felt there will be increased demand/enrollment over the next several years.

Impact of COVID-19 on Demand for Online Education (n=211)



We also wanted to know which fields of study school administrators believed would experience the most growth online over the next five years. This year 173 participants shared their predictions, which were similar in some ways to responses received in previous years. Computer sciences, health-related majors, and business-related majors remained the top three majors poised for growth, though their order shifted somewhat in our 2021 survey, with computer sciences now claiming a top spot.

Top Areas for Online Growth in the Next Five Years - Academic Disciplines				
RANK	2018	2019	2020	2021
1	BUSINESS (30%)	HEALTHCARE (30%)	BUSINESS (20%)	COMPUTER SCIENCES (25%)
2	HEALTHCARE (23%)	BUSINESS (26%)	HEALTHCARE (20%)	HEALTHCARE (25%)
3	COMPUTER SCIENCES (12%)	COMPUTER SCIENCES (13%)	COMPUTER SCIENCES (16%)	BUSINESS (20%)
4	FAITH-BASED TOPICS (12%)	EDUCATION (6%)	FAITH-BASED TOPICS (8%)	HUMAN SERVICES (COUNSELING, PSYCHOLOGY, SOCIAL WORK) (8%)
5	GENERAL STUDIES (8%)	FAITH-BASED TOPICS (4%)	HUMAN SERVICES (COUNSELING, PSYCHOLOGY, SOCIAL WORK) (7%)	HUMANITIES AND LIBERAL ARTS (6%)

Student Satisfaction

Each year, we explore student satisfaction with online learning through three lenses related to (1) whether or not students would recommend online education to others, (2) their perception of a positive return on their investments in online education, and (3) their overall perception of online education compared to traditional, campus-based education.

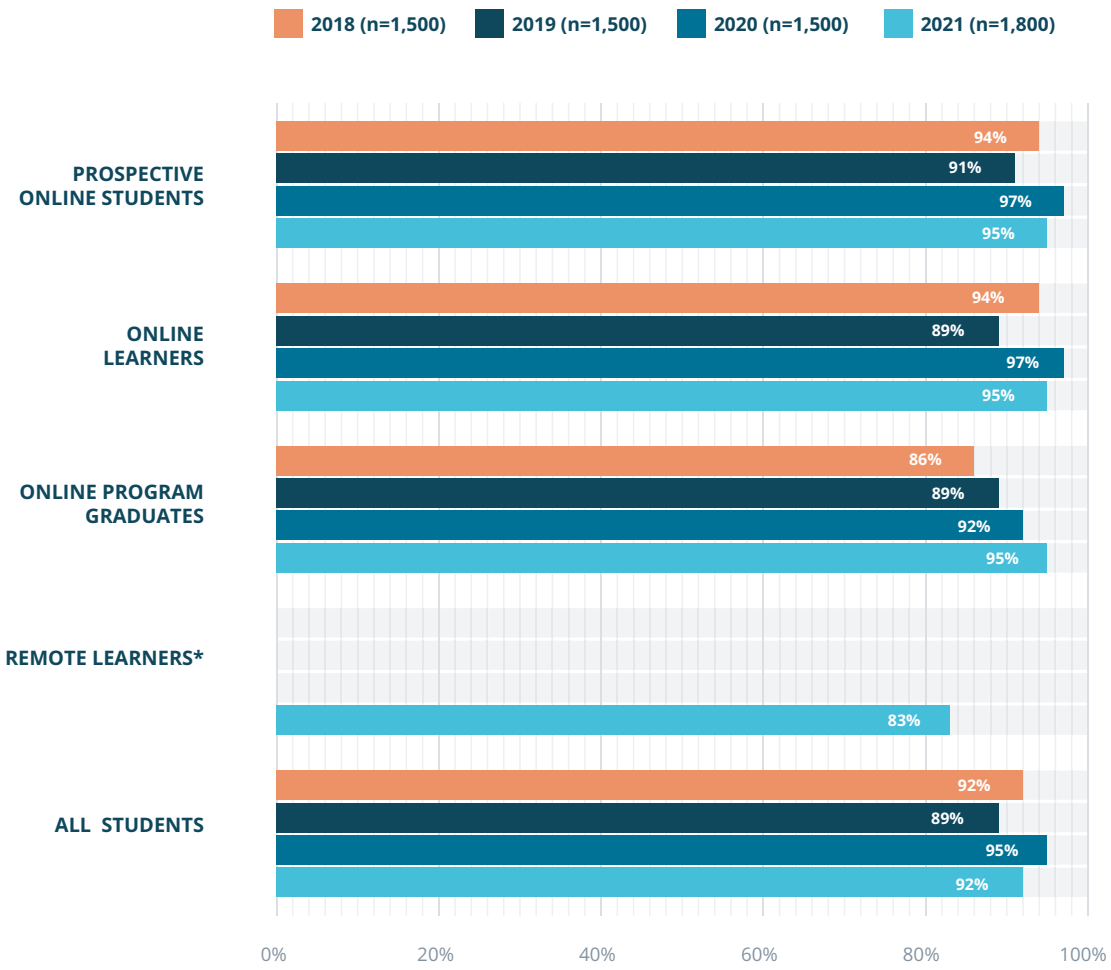
RECOMMENDING ONLINE EDUCATION TO OTHERS

Recommendations and referrals can be influential in major buying decisions, such as those related to higher education. As reported previously, many prospective college students relied on student reviews when researching and comparing college programs.

When asked if they would recommend their learning experiences to others, the response this year was once again overwhelmingly positive, with 92% of students willing to recommend online or remote education. This was 3 percentage points lower than last year's response, when a record 95% of students were willing to recommend online learning to others.

Remote learners, who did not choose distance learning when they enrolled, were the least likely to say they would recommend online or remote learning; however, their willingness to recommend this educational format was still extremely high at 83%.

Students Who Would Recommend Online/Remote Education to Others



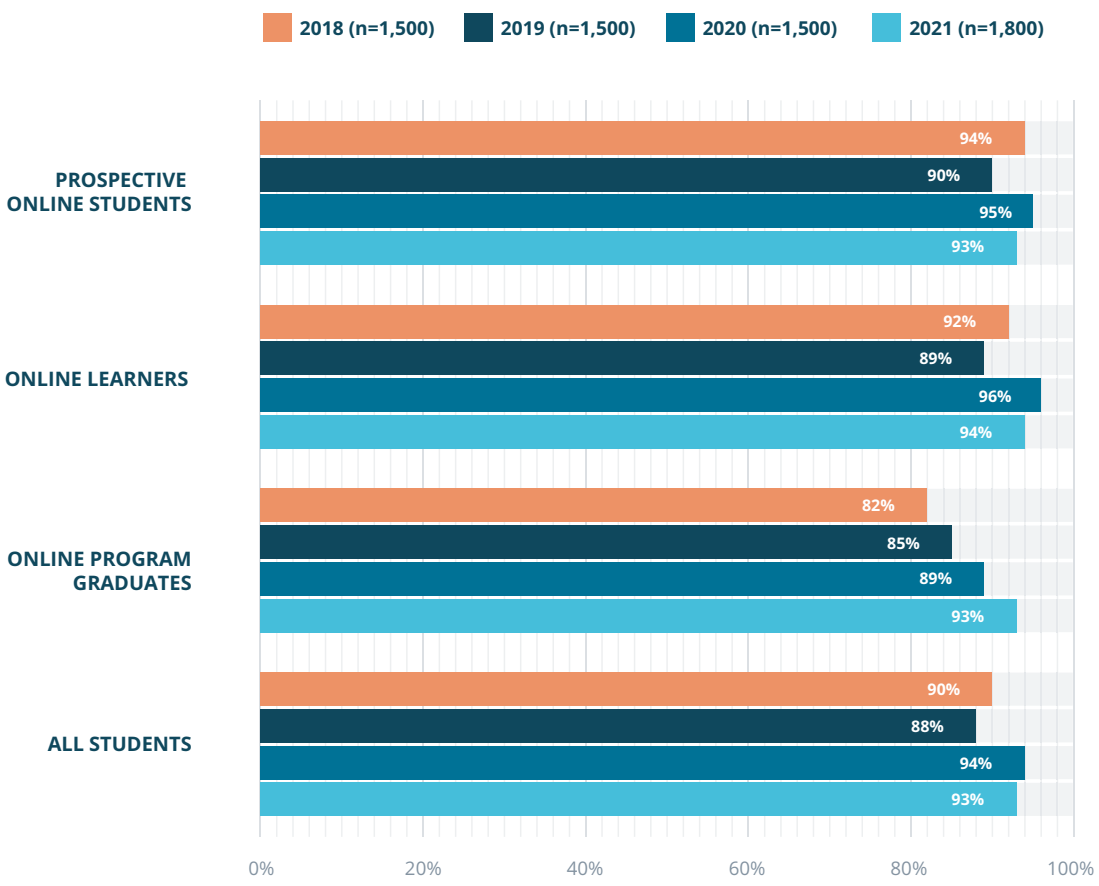
*New student category added in 2021

The number of online program graduates saying they would recommend online education rose slightly from last year (92% vs. 95%), while the numbers of online students and prospective students each fell 2 percentage points, from 97% in 2020 to 95% in 2021.

RETURN ON INVESTMENT (ROI)

Many students view paying for a college education as an investment in their future in terms of employment and income potential. In total, more than 9 in 10 participants (93%) reported or anticipated a positive return on their education investment. Last year this number reached 94%, the highest in the history of this report.

My Online Degree Has or Will Have a Positive ROI



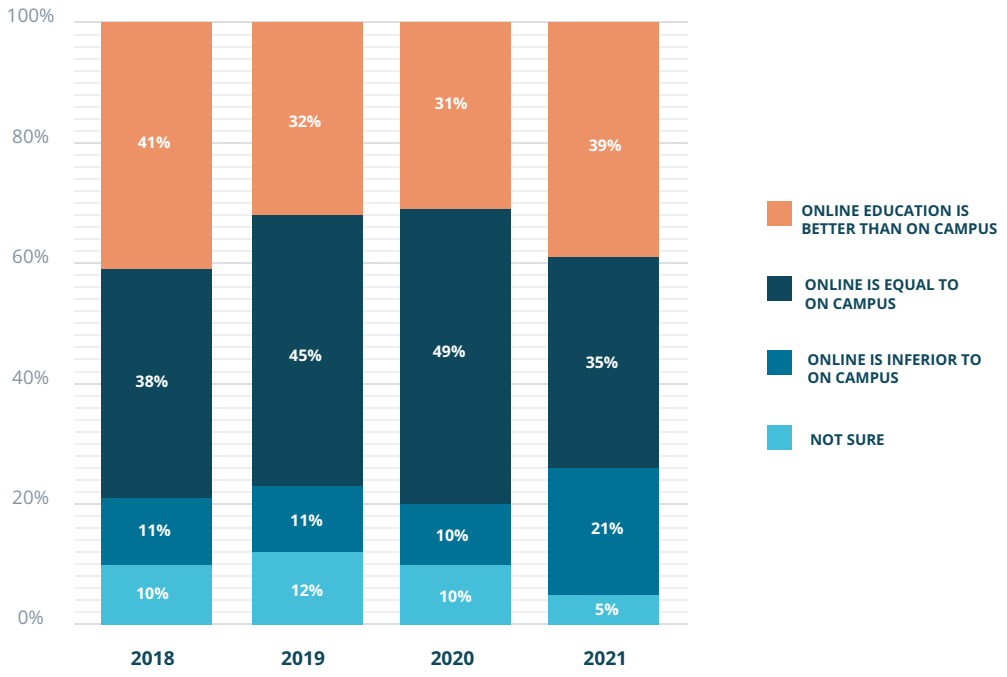
For online program graduates, 93% reported a positive ROI this year, which is the highest percentage reported in this study by this group. This also reflects an increase of 4 percentage points over last year.

PERCEPTION OF ONLINE EDUCATION

Questions about the quality of online education when compared to traditional, campus-based education continue to drive discourse in higher education. That said, this year most colleges and university students are participating in distance learning on some level. Will this experience change the way online education is generally perceived?

While more students this year said online learning was inferior to on-campus learning (21%), more also said it was better (39%). Additionally, fewer (5%) were unsure about its quality, which may be due to the fact that more students have now had the opportunity to experience online/remote learning firsthand following the coronavirus outbreak.

Perceptions of Online Education - All Student Categories (n=1,800)



Overall, a majority (74%) of all students surveyed felt online learning was better than or equal to on-campus learning, though this response was slightly higher last year at 80%. Students currently enrolled in online programs were the most likely to indicate a positive perception of online education (83%), followed by online program graduates (81%). Remote students, by contrast, reported the least positive perception of learning in an online environment: Just 64% said it was better than or equal to on-campus learning.

The impact of COVID-19 on the educational experience in 2020 — and the widespread coverage of that experience — may influence students' thoughts about enrolling in fully online programs. This year, 67% of prospective students held a positive perception of online education, compared to 79% the previous year.

BESTCOLLEGES INSIGHT

Student Satisfaction Remains High, but Action Is Required to Maintain This Trend

The year 2020 asked a lot of everyone, including those involved in higher education. It would have been understandable to expect low satisfaction ratings from students, especially those who became remote or online students due to circumstances beyond their control; however, we found high satisfaction levels overall, tempered by some potential hesitation from students who are now just thinking about enrolling in online programs.

The ball seems to be in higher education's court. Learning from the experiences of 2020, and making changes based on those experiences, will determine the future path of higher education and the choices of tomorrow's online students.

Conclusion

As stakeholders of higher education continue to experience changes related to the coronavirus outbreak, many report positive outcomes amid the frustrations and hard-won lessons learned. Change continues to impact how, when, and where courses are offered, but we must not forget who is involved and who is in need of support — especially students. Insights from this year's study provide a starting point for institutional leaders as they plan for the future of their academic and student support programs.

One-Size-Fits-All Services May Leave Some Students Behind

While remote learners participating in this study reported fewer than expected challenges with technology, the digital divide revealed by widespread campus closures and an abrupt switch to virtual learning environments should not be ignored. The students participating in our study may see some challenges as temporary and anticipate a return to normal campus operations in 2021.

The biggest issue for all students appears to be balancing their academic and nonacademic obligations. Institutions can potentially do more to help students plan for and implement the support they need to complete their academic programs while fulfilling other work and life roles, understanding that each student brings their own combination of needs to the virtual learning environment.

Invite Student Participation in the Planning Process to Avoid Resource Misalignment

How does your institution assess student challenges? Every institution's and every program's student population is unique. Student input can enhance decision-making and help avoid assumptions that lead to the misalignment of resources that are likely already limited. This input could come from many directions, including student participation in committees, student leadership organizations, focus groups, and end-of-term evaluations.

Provide Easy Access to the Information Students Want and Need

What information and resources do students encounter when they look for information about online program costs and funding? What happens when they contact your school or program directly or follow your school's social media accounts? Consider the many potential modes of communication available to prospective students. Provide access to their areas of interest — finances, how programs compare, why your program may be a good fit — and opportunities to connect with school representatives for more information. It is also important to be aware of what your current and prior students are posting on review sites, such as GradReports, Cappex, and Unigo.

Embrace the Opportunities to Integrate Technology in New Ways

Through the rushed development of virtual learning in 2020, many institutions gained a sense of how applying instructional strategies and tools in different ways can help them reach and support a wider variety of students. There is potential for remote learning as a specific strategy. For example, remote learning could be used to reach students at a distance, while still maintaining traditional approaches related to scheduling and regular interactions with instructors — but with more extensive use of synchronous online tools, such as Zoom, Blackboard Collaborate, and Webex. On-campus students can also benefit from online services. And by embracing remote work, schools can change how resources are allocated so that they better benefit students, faculty, and staff alike.

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The ball seems to be in higher education's court. Learning from the experiences of 2020, and making changes based on those experiences, will determine the future path of higher education and the choices of tomorrow's online students.

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 a certified career coach with a background in career development services. She earned her doctorate in instructional technology at the University of South Florida where her research interests focused on 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.

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 the delivery of online programs, were optional.
4. Data are self-reported.

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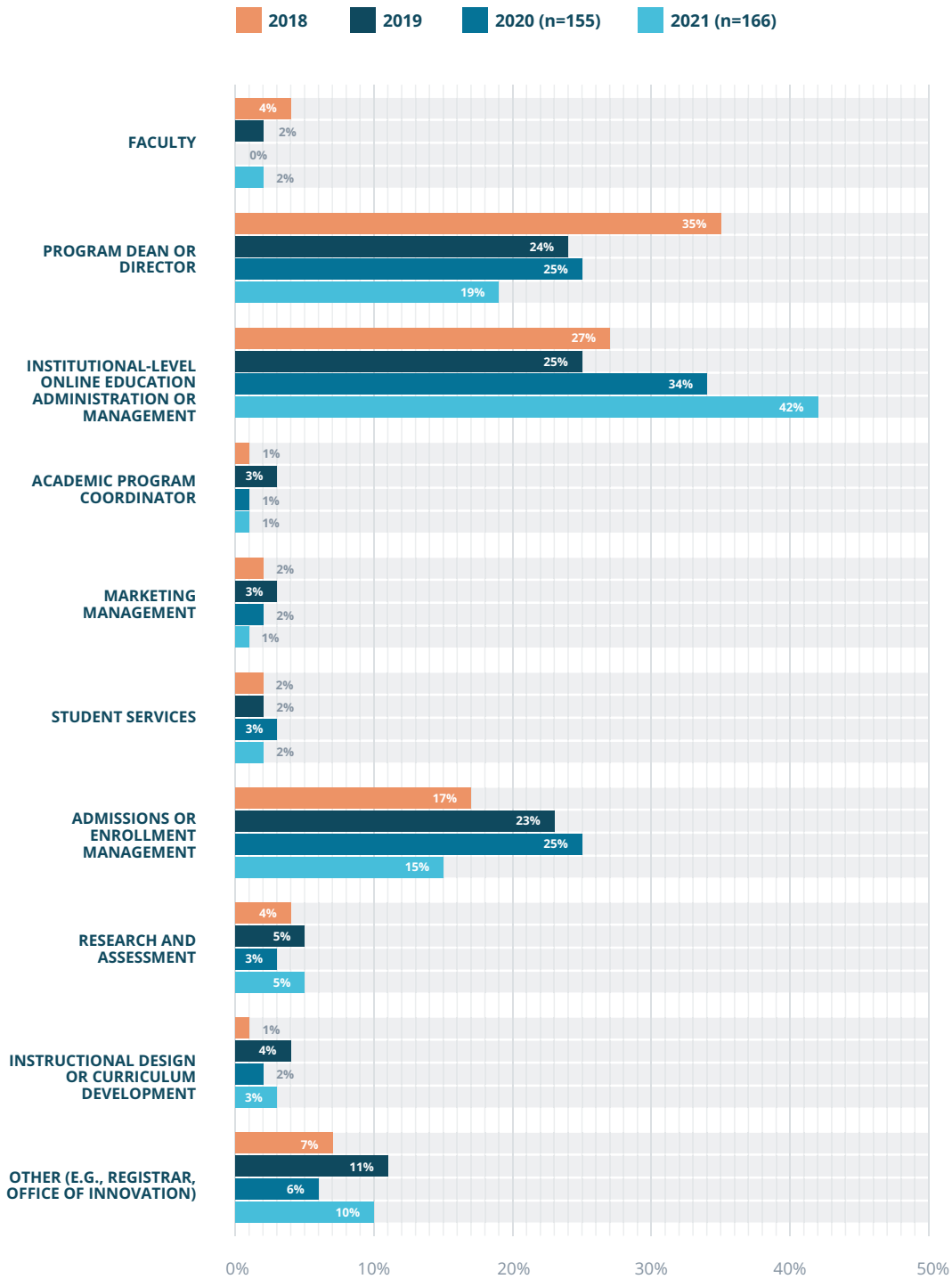
Appendix: Participant Demographics

SCHOOL ADMINISTRATOR PARTICIPANTS

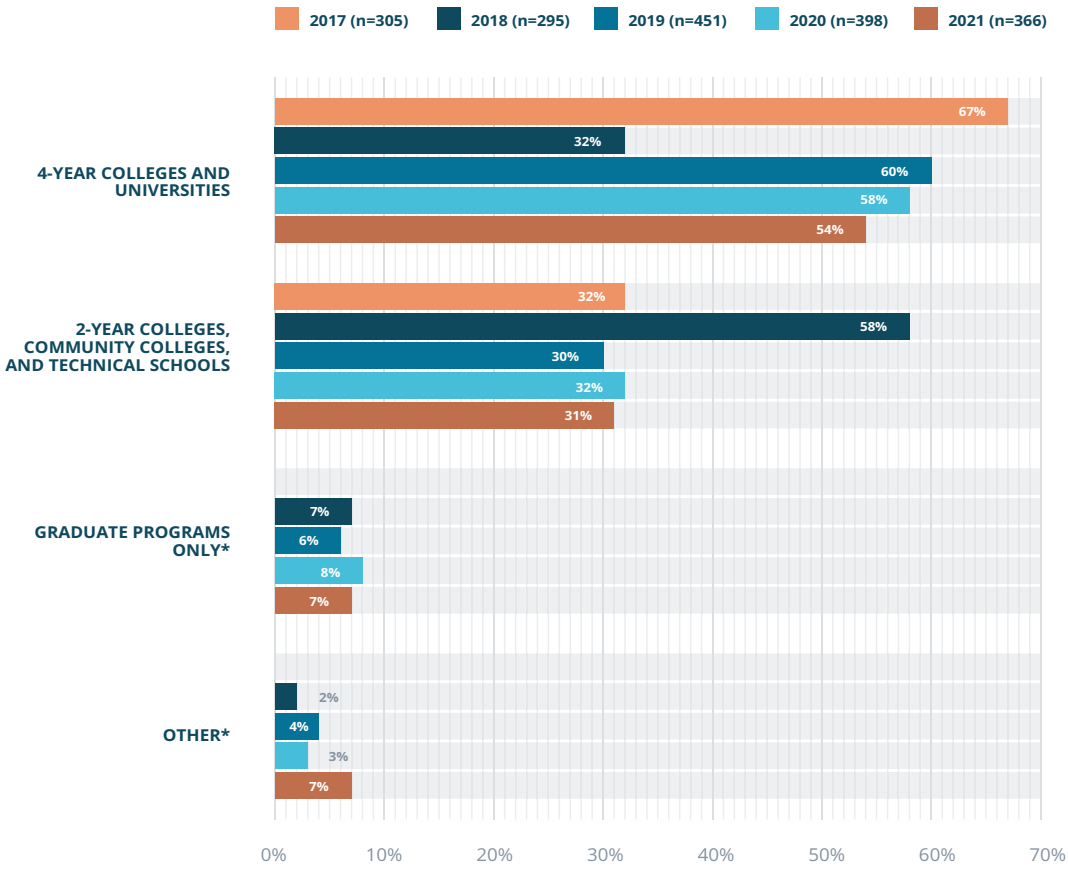
Data collection – SurveyMonkey

Respondent's Primary Role



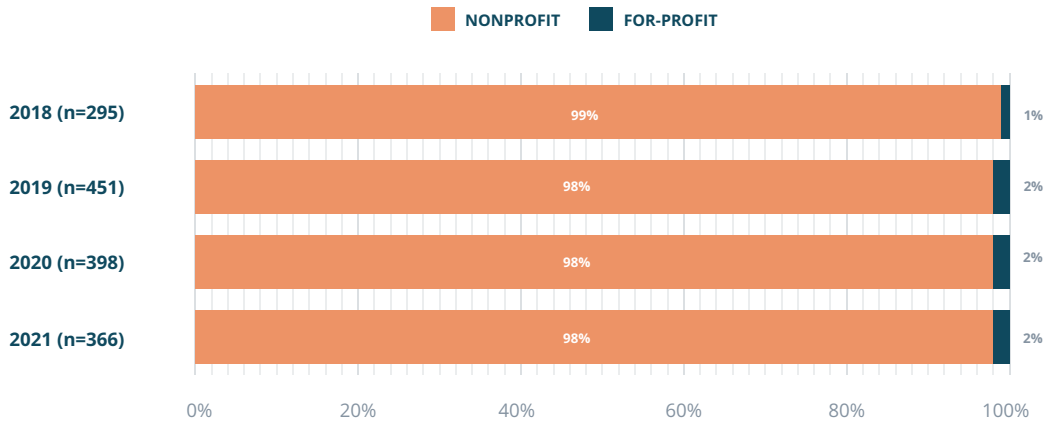
This data not collected prior to 2018

Institutional Classification



*New response option added in 2018

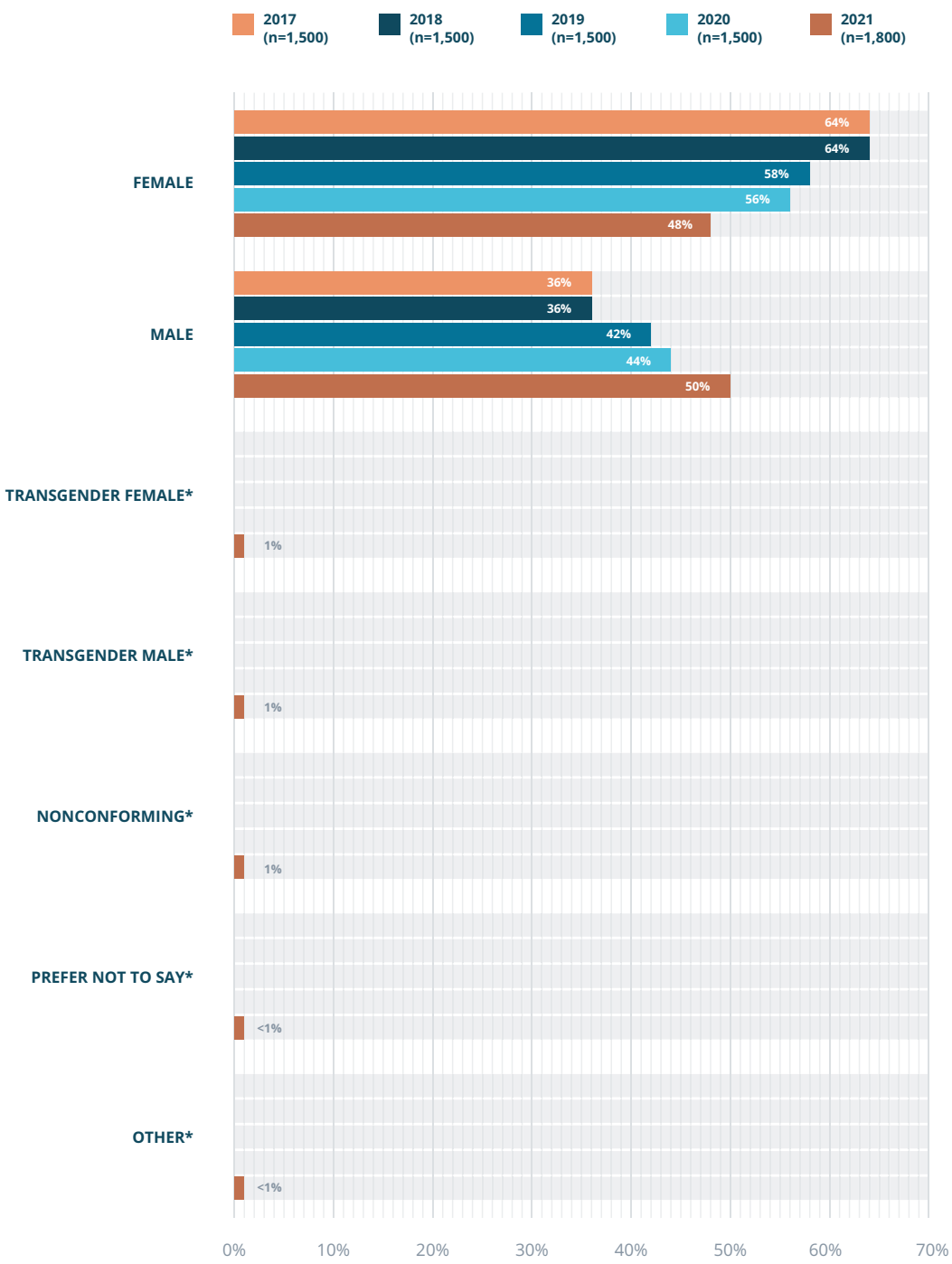
Institution Type



STUDENT PARTICIPANTS

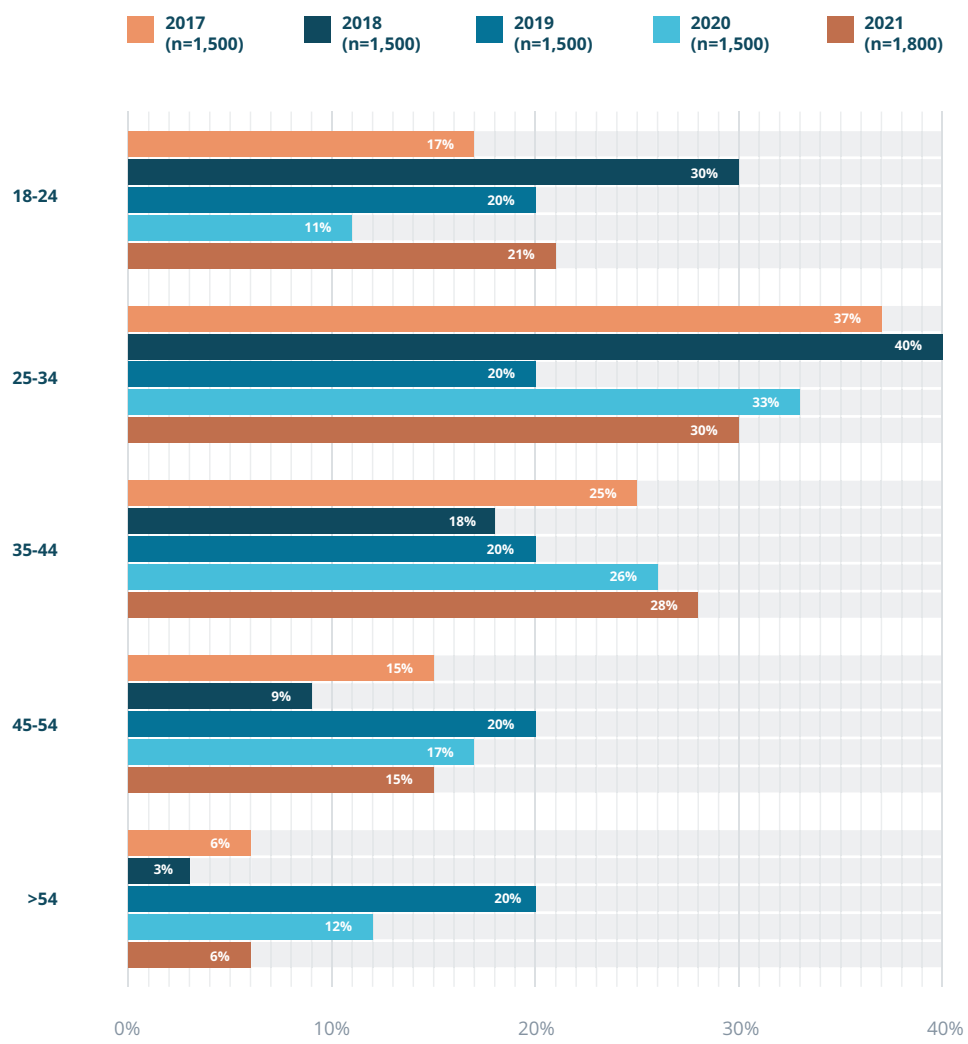
Data collection – Lucid LLC

Gender



*New response option added in 2021

Age


2017 (n=1,500)
2018 (n=1,500)
2019 (n=1,500)
2020 (n=1,500)
2021 (n=1,800)
18-24
17%
30%
20%
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21%
25-34
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40%
20%
33%
30%
35-44
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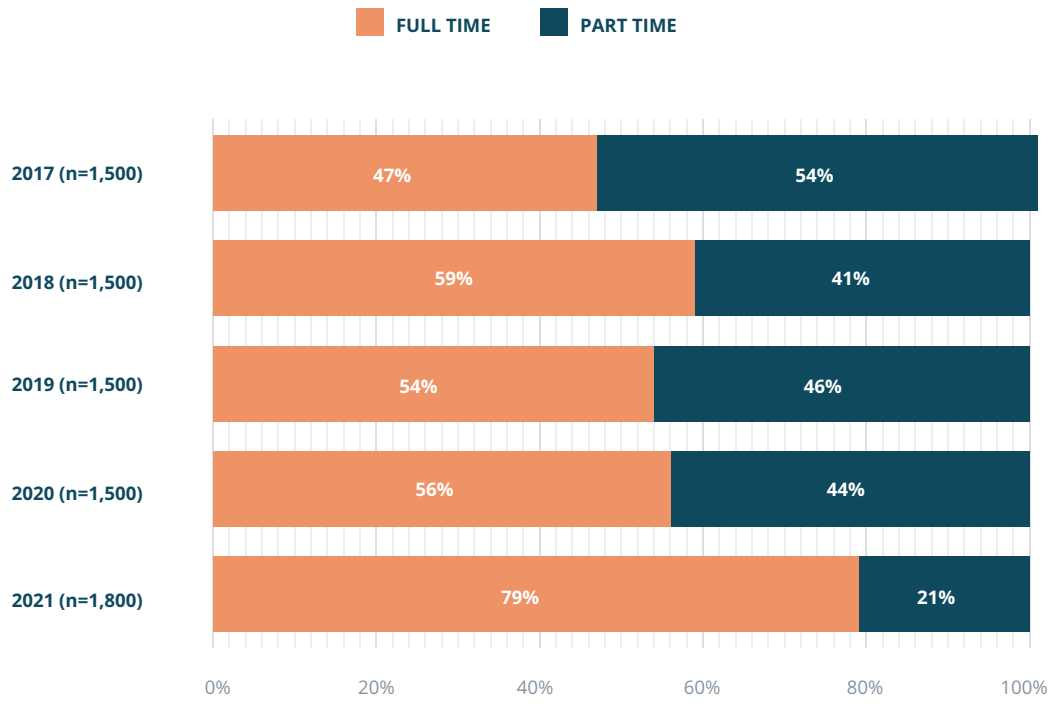
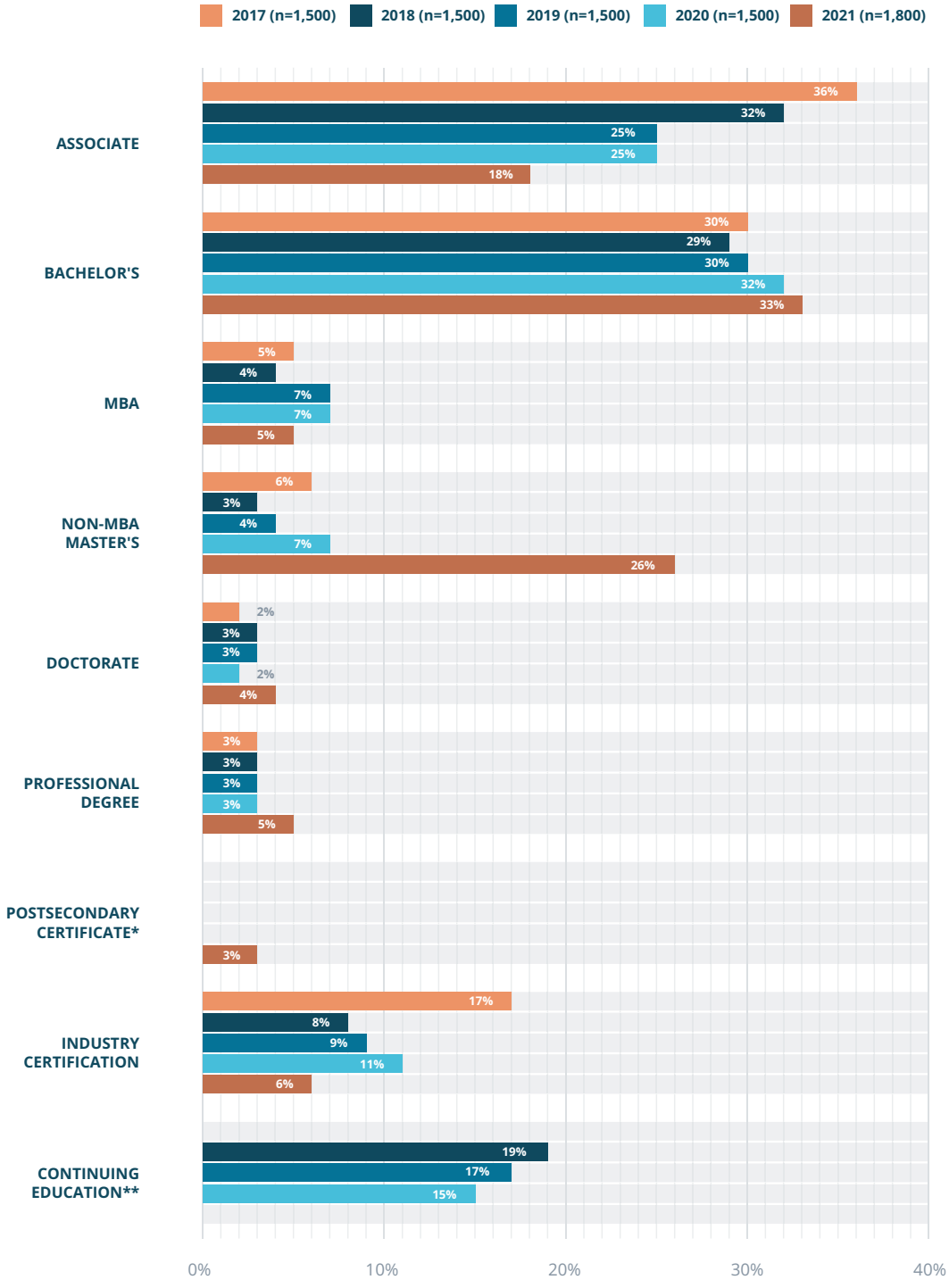
40%

Enrollment Status



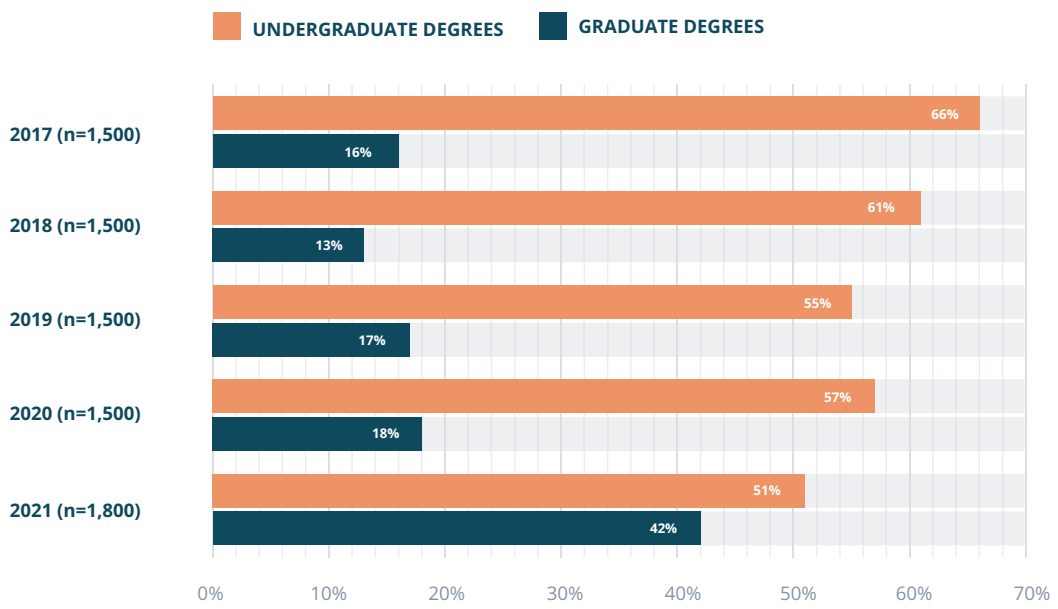
Degree Pursuing



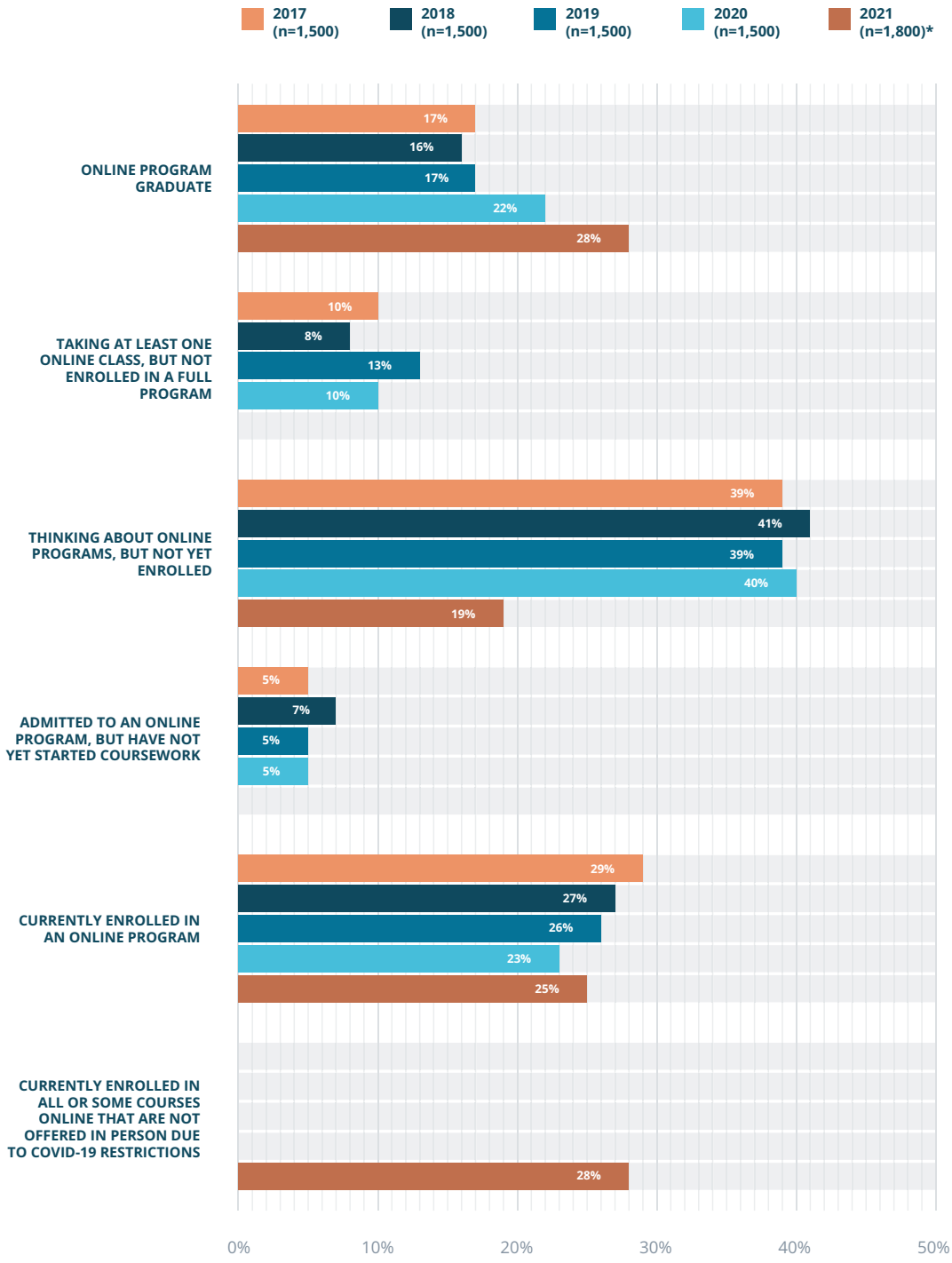
*New response option added in 2018

** Response option added in 2018, removed in 2021

Enrollment Level

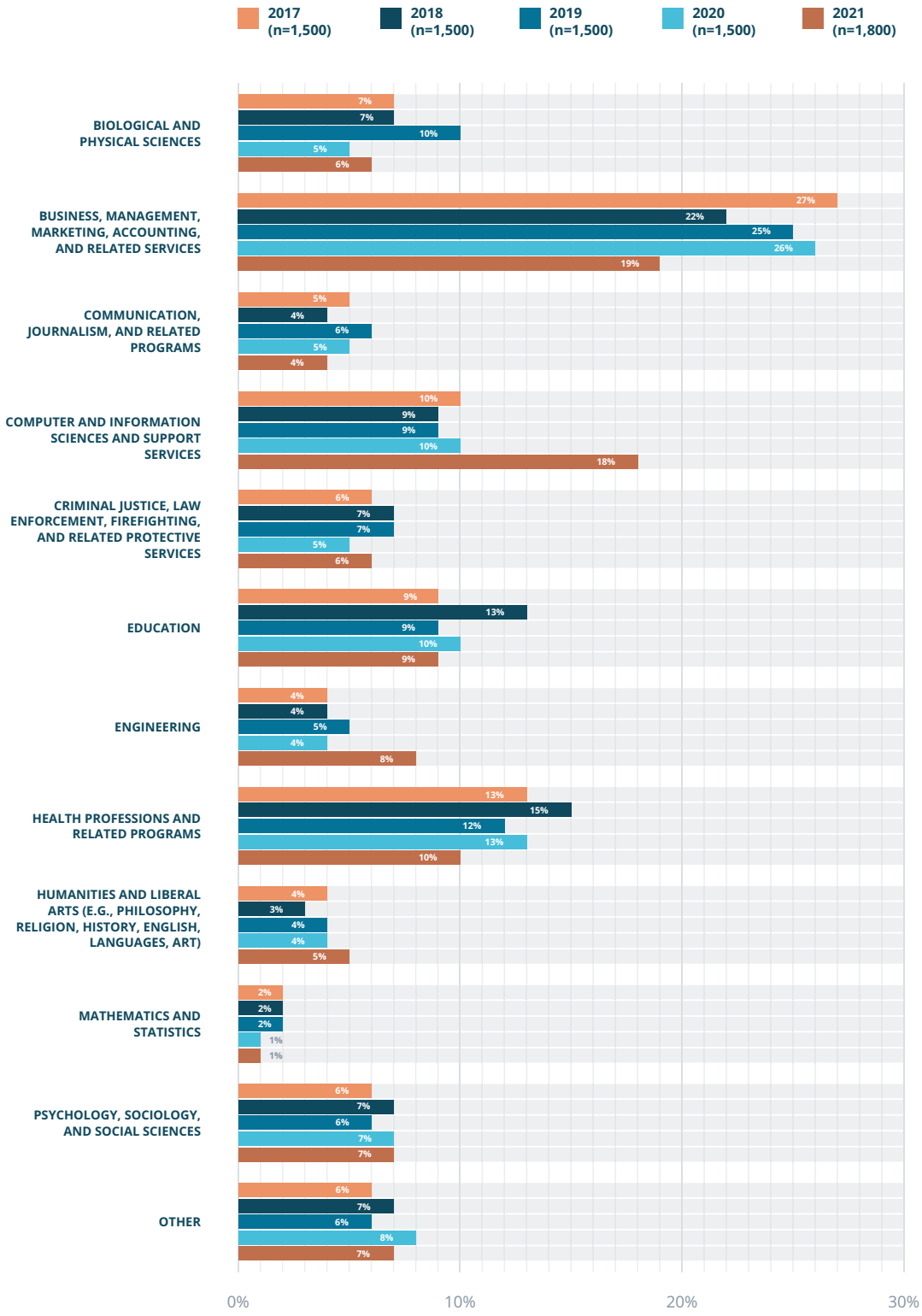


Student Status

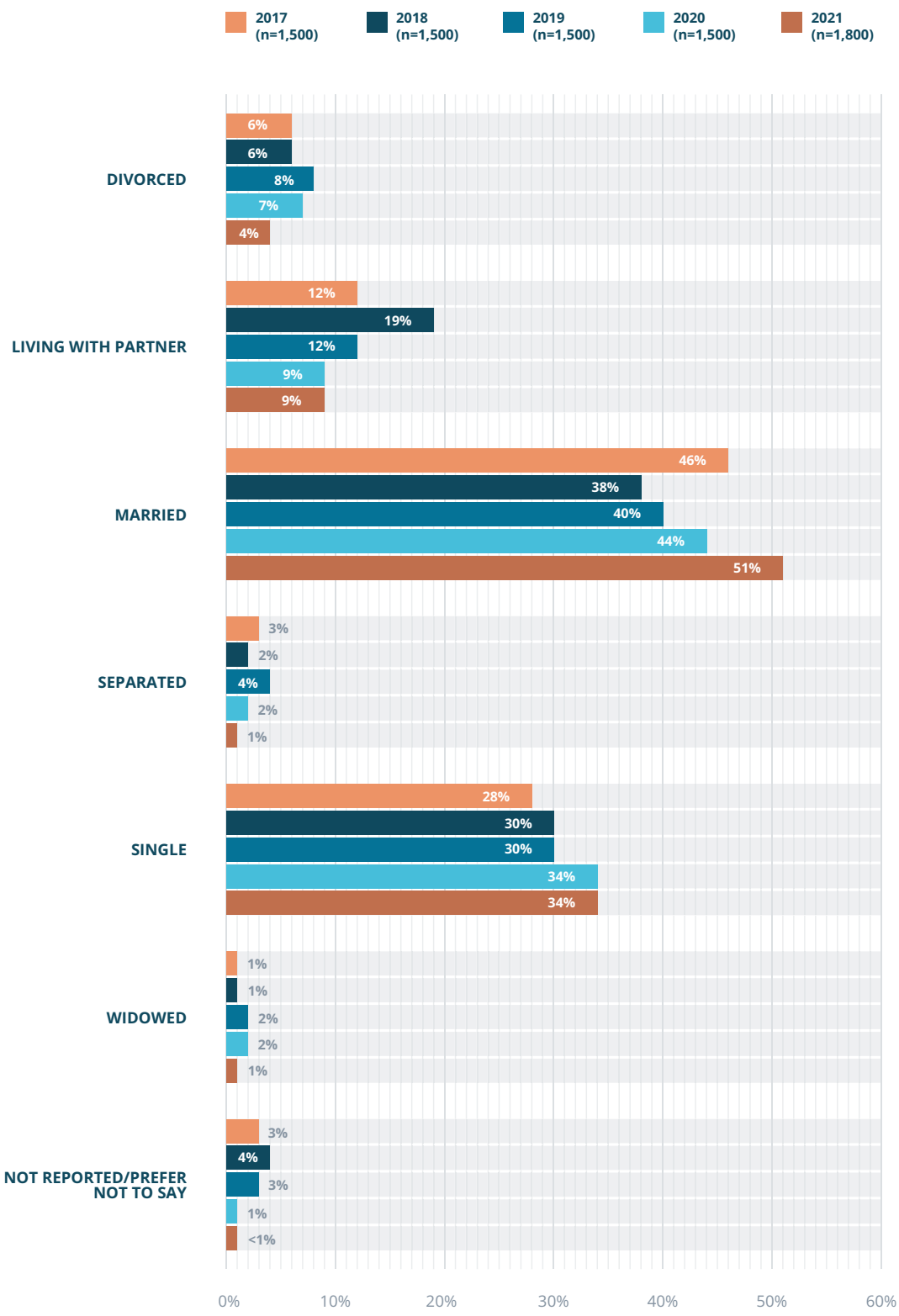


*Response options revised

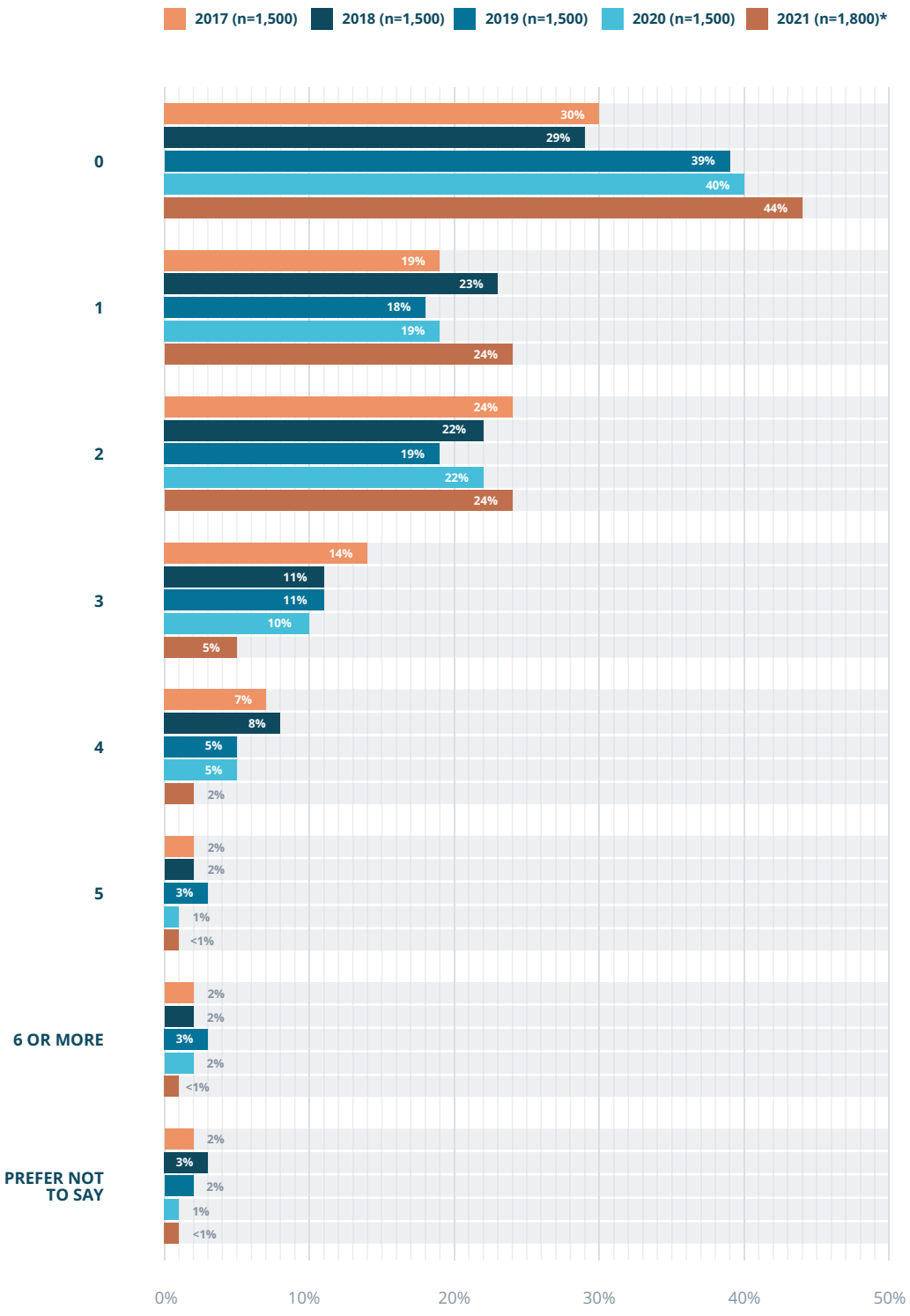
Major/Intended Major



Marital Status

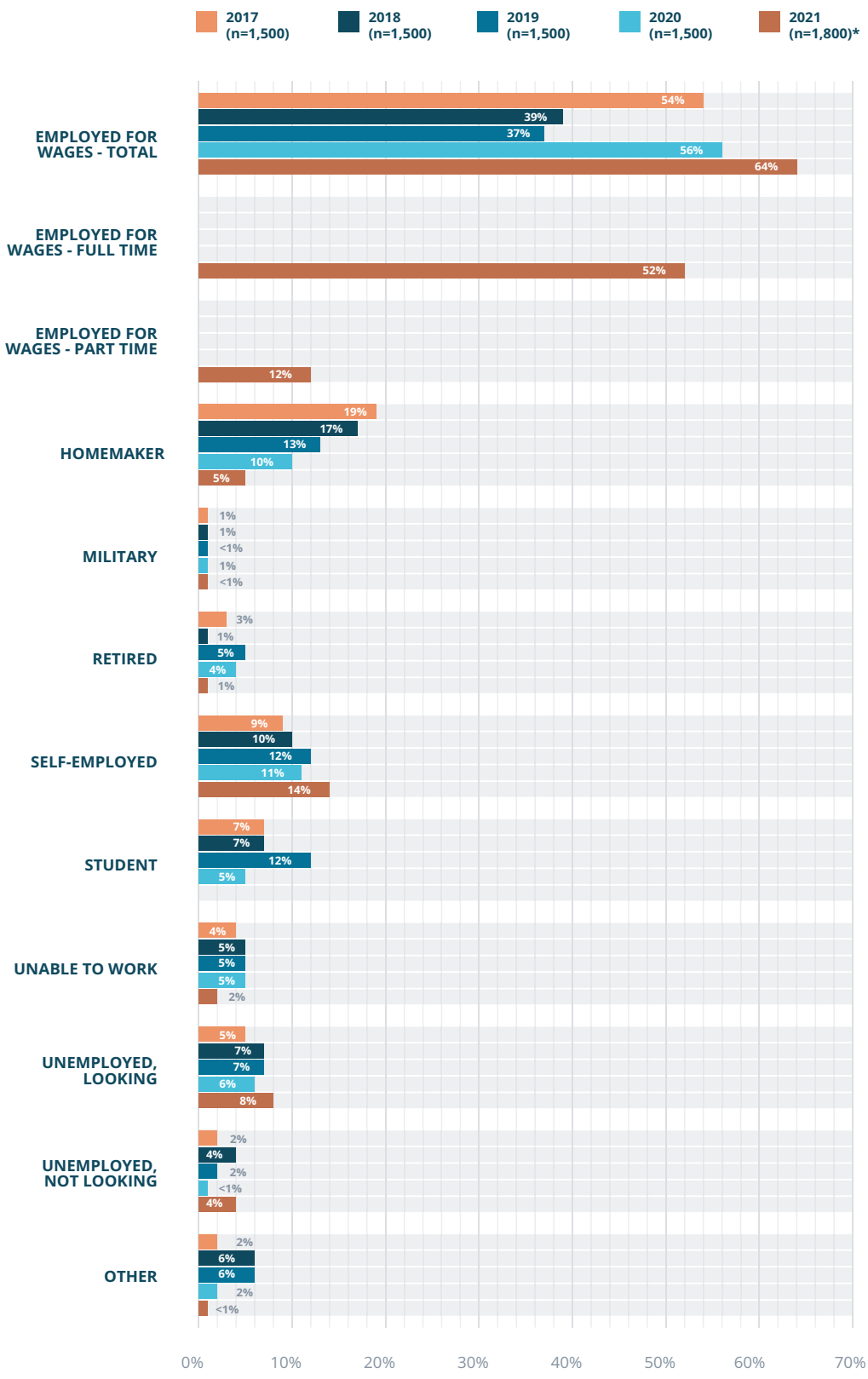


Number of Children



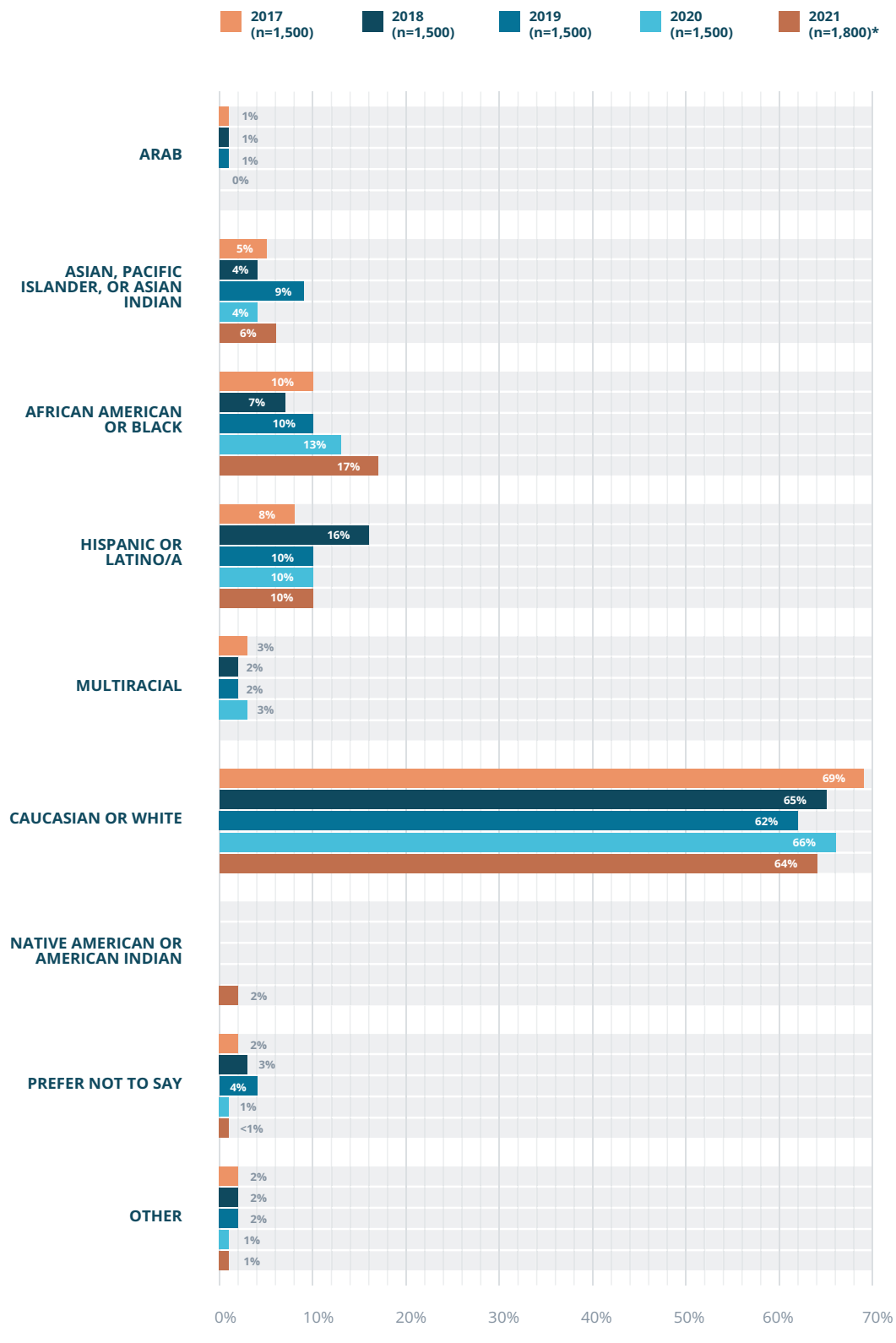
*Item revised in 2021 to reflect number of children under the age of 18 living at home

Employment Status



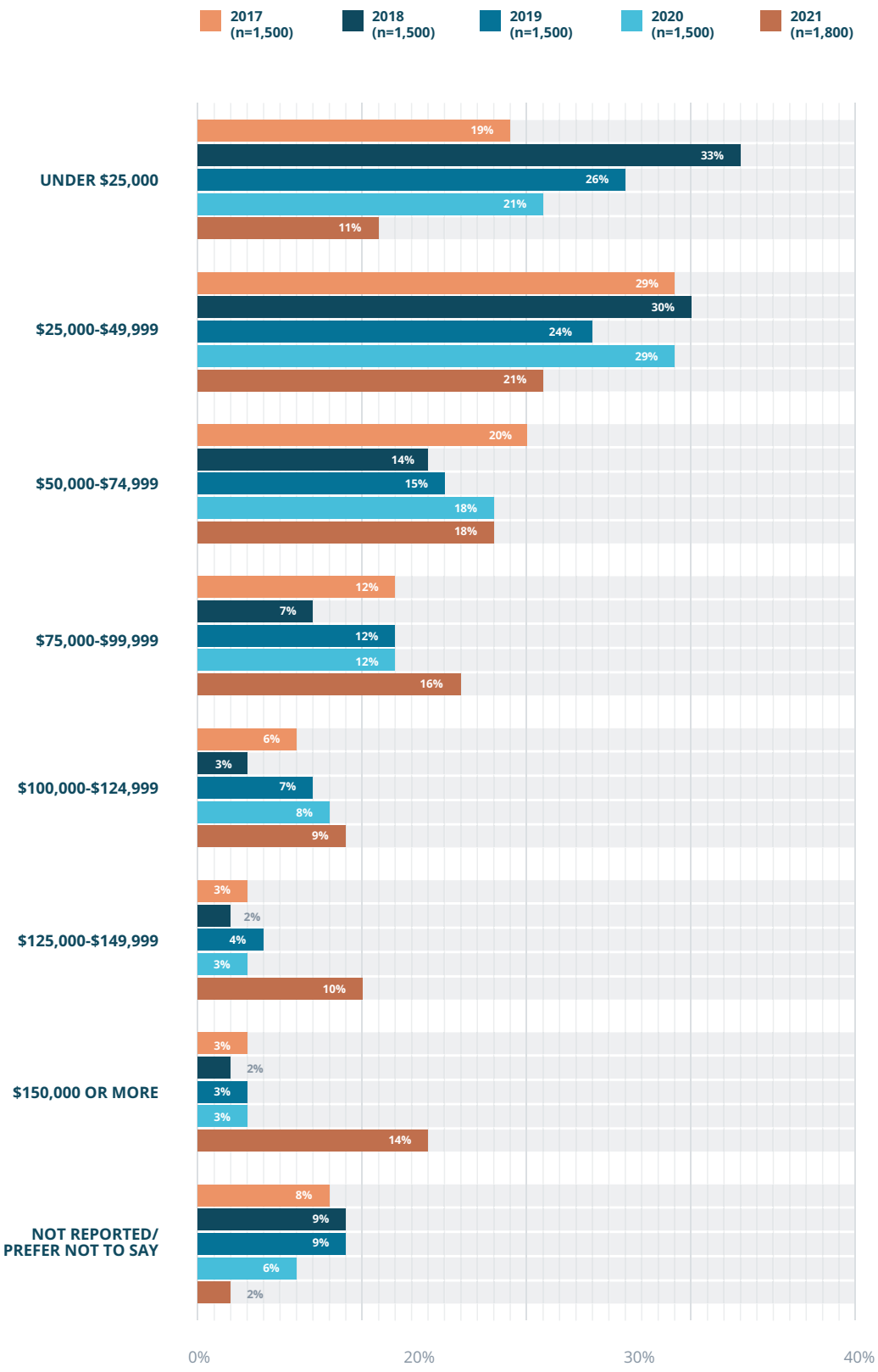
*Response options revised

Race



*Response options revised

Income Level



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