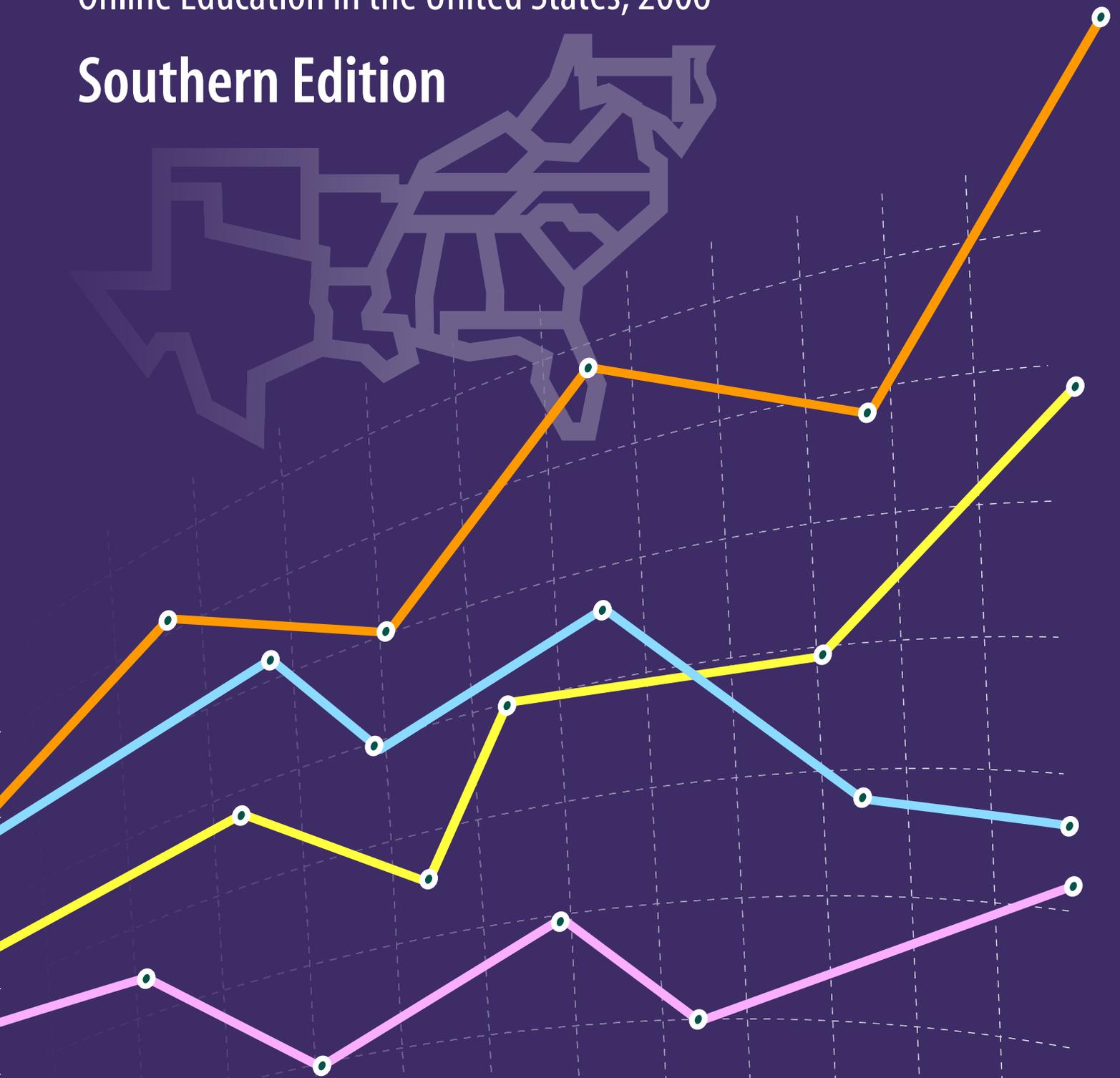


Making the Grade

Online Education in the United States, 2006

Southern Edition



The Sloan Consortium

I. Elaine Allen and Jeff Seaman

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WELCOME

The 2006 Southern Edition, derived from the national report, *Making the Grade: Online Education in the United States*, provides further evidence of the continuing growth, development and importance of online learning in the South. The report complements the efforts initiated in 2003 by the SREB-State Data Exchange to provide detailed interstate comparisons on credit hours earned through online learning. With the SREB states representing over one-third of the total online enrollments in the U.S., there is clear evidence that the “phenomena” of online learning has yet to peak. We are reaching new students, many of whom are older learners who would otherwise have limited or no access to higher education. The number of online programs continues to grow and, more importantly, academic leaders increasingly report that learning outcomes from online education are similar, or better, than in traditional face-to-face instruction.

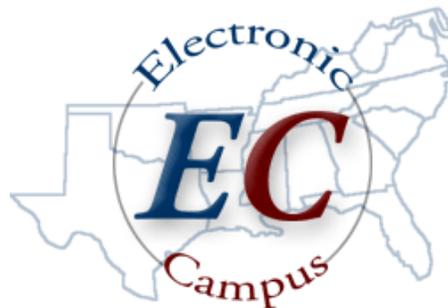
At the same time, participation by smaller institutions continues to lag and faculty acceptance of online learning, while increasing slightly, is well below the level that we would like. Several other challenges or “barriers” described in the report, help to create a working agenda for the years ahead. We trust this report will provide not only SREB, our colleges and universities, state leadership and policymakers with a roadmap for action that will ensure the continued growth of online learning in the South.

On behalf of SREB, our member states, and *Electronic Campus* colleges and universities, I want to thank the Sloan Consortium and Drs. Elaine Allen and Jeff Seaman for their continuing efforts in undertaking this special study. The ongoing support of this research by the Alfred P. Sloan Foundation, and Dr. A. Frank Mayadas, Program Officer, are also greatly appreciated.

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Copies of this and all of the reports in the series can be downloaded without charge from the Sloan Consortium web site at <http://www.sloan-c.org/>.

The Southern Regional Education Board, the nation's first interstate compact for education, was created in 1948 by Southern states. SREB helps government and education leaders work cooperatively to advance education and, in doing so, to improve the social and economic life of the region. SREB's 16 member states are Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia and West Virginia.

The logo for the Southern Regional Education Board (SREB) consists of the letters "SREB" in a large, blue, serif font.

EXECUTIVE SUMMARY

Making the Grade: Online Education in the United States, 2006: Southern Edition represents the second report on the state of online learning in U.S. higher education in the sixteen-state southern region. This year's study, like last year's, is aimed at answering some of the fundamental questions about the nature and extent of online education. Supported by the Alfred P. Sloan Foundation and based on responses from over 700 southern colleges and universities, the study addresses the following key questions:

HAS THE GROWTH OF ONLINE ENROLLMENTS BEGUN TO PLATEAU?

Background: *For the past several years, online enrollments have been growing substantially faster than the overall higher education student body. However, last year's national study, while reporting the same numeric increase as the previous year, had a lower percentage growth rate. Could this be an early indicator that online enrollment growth has finally begun to plateau?*

The evidence: There has been no leveling of the growth rate of online enrollments; institutions of higher education report record online enrollment growth on both a numeric and a percentage basis.

- Nationally, nearly 3.2 million students were taking at least one online course during the fall 2005 term, a substantial 35 percent increase over the 2.3 million reported the previous year.
- The sixteen southern states represent over one-third of total online enrollments, with over 1.1 million students taking at least one online course in the fall 2005 term.

WHO IS LEARNING ONLINE?

Background: *There is some evidence that online education appeals to a different type of student from those who participate in face-to-face instruction. Online students tend to be older and often hold additional employment and family responsibilities, as compared to the more traditional student. Do these differences mean that online students are taking different level courses or studying at different types of institutions?*

The evidence: The distribution of online students by level of study is similar to that of the general higher education student body, but the mix of schools at which they are enrolled is not.

- Online students, both nationally and in the south, are overwhelmingly undergraduates, matching their proportion among the overall higher education student body.
- Online students, especially undergraduates, are more likely to be studying at Associates institutions than are their face-to-face contemporaries.

WHAT TYPES OF INSTITUTIONS HAVE ONLINE OFFERINGS?

***Background:** Previous reports in this series have shown a very uneven distribution of online course and program offerings by type of institution. Public institutions and the largest institutions of all types have consistently been at the forefront of online offerings. Those that are the least likely to offer online courses, and typically have the most negative opinions about online education in general, have been the small, private, four-year institutions.*

The evidence: This year's results show no major changes from previous patterns. The same types of institutions are at the forefront of online offerings.

- More than 99 percent of the very largest southern institutions (more than 15,000 total enrollments) have some online offerings, which is more than double the rate observed for the smallest institutions.
- The proportion of southern institutions with fully online programs rises steadily as institutional size increases, and about three-quarters of the very largest institutions have fully online programs, compared to only about one-sixth of the smallest institutions.
- Southern Doctoral/Research institutions have the greatest penetration of offering online programs as well as the highest overall rate (more than 88%) of having some form of online offering (either courses or full programs).

HAVE PERCEPTIONS OF QUALITY CHANGED FOR ONLINE OFFERINGS?

***Background:** The first national study in this series found that a majority of Chief Academic Officers rated the learning outcomes for online education “as good as or better” than those for face-to-face instruction. The following year’s report displayed similar results. Do academic leaders hold the same opinion today, given the rapid growth in the numbers of online students?*

The evidence: By an increasing margin, most Chief Academic Officers believe that the quality of online instruction is equal to or superior to that of face-to-face learning.

- In 2003, 56 percent of academic leaders in the sixteen southern states rated the learning outcomes in online education as the same or superior to those in face-to-face. That number is now 65 percent.
- The proportion who believe that online learning outcomes are superior to those for face-to-face is still relatively small but has grown by 25 percent since 2003; from 12.5 percent to 15.5 percent.

WHAT ARE THE BARRIERS TO WIDESPREAD ADOPTION OF ONLINE EDUCATION?

Background: Previous studies, both national and southern editions, have identified a number of areas of concern for the potential growth of online offerings and enrollments. Academic leaders have commented that their faculty often don't accept the value of online learning and that it takes more time and effort to teach an online course. To what extent do these leaders see these issues and others as critical barriers to the widespread adoption of online learning?

The evidence: Problem areas identified in previous years are still seen as areas of concern among academic leaders.

- Only 3.3 percent of southern Chief Academic Officers agreed that there are no significant barriers to widespread adoption of online learning.
- Two-thirds of southern academic leaders cite the need for more discipline on the part of online students as a critical barrier.
- Faculty issues, both acceptance of online and the need for greater time and effort to teach online, remain important barriers.
- Neither a perceived lack of demand on the part of potential students nor the acceptance of an online degree by potential employers was seen as a critical barrier.

WHAT IS ONLINE LEARNING?

The focus of this report is online education. To be consistent with previous work, we have applied the same definitions used in our prior national and southern reports. These definitions were presented to the respondents at the beginning of the survey, and repeated in the body of individual questions where appropriate.

Online courses, the primary focus of this report, are those in which at least 80 percent of the course content is delivered online. “Face-to-face” instruction includes those courses in which zero to 29 percent of the content is delivered online; this category includes both traditional and Web facilitated courses. The remaining alternative, blended (sometimes called hybrid) instruction is defined as having between 30 percent and 80 percent of the course content delivered online. While the survey asked respondents for information on all types of courses, results of the analysis of blended options will be presented in a future publication; the current report is devoted to online only.

While there is a great deal of diversity among course delivery methods used by individual instructors, the following is presented to illustrate the prototypical course classifications used in this study.

Proportion of Content Delivered Online	Type of Course	Typical Description
0%	Traditional	Course with no online technology used — content is delivered in writing or orally.
1 to 29%	Web Facilitated	Course that uses web-based technology to facilitate what is essentially a face-to-face course. Uses a course management system (CMS) or web pages to post the syllabus and assignments, for example.
30 to 79%	Blended/Hybrid	Course that blends online and face-to-face delivery. Substantial proportion of the content is delivered online, typically uses online discussions, and typically has some face-to-face meetings.
80+%	Online	A course where most or all of the content is delivered online. Typically have no face-to-face meetings.

Schools may offer online learning in a variety of ways. The survey asked respondents to characterize their face-to-face, blended, and online learning by the level of the course (undergraduate, graduate, continuing education, etc.). Likewise, respondents were asked to characterize their face-to-face, blended, and online program offerings for certificate, associate, bachelors, masters, doctoral, and professional programs.

DETAILED SURVEY FINDINGS

How Many Students are Learning Online?

Online enrollment growth continues unabated, tops 3 million.

In 2003, the first in the series of national annual reports on the state of online learning in U.S. higher education, *Sizing the Opportunity: The Quality and Extent of Online Education in the United States, 2002 and 2003* was released. The initiation of this annual study emerged from a search for an authoritative answer to a simple question: “How many students are learning online?” The answer determined by that first study was that for the fall 2002 term, slightly more than 1.6 million students took at least one online course at U.S. degree-granting institutions. This same study asked institutions to predict the rate of growth (or decline) in their online enrollments for the following year, and respondents

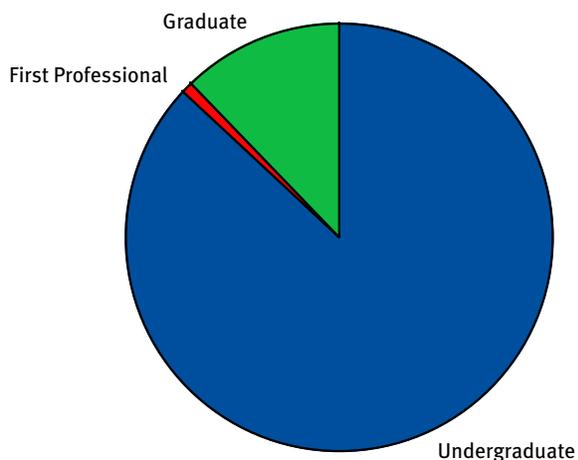
projected an average annual growth rate of 19.8 percent. This number was substantially above the annual rate of increase in the overall population of higher education students, whose annual growth has been estimated as between 0.8 and 1.3 percent. The second annual study, *Entering the Mainstream, The Quality and Extent of Online Education in the United States, 2003 and 2004*, found that the overall growth in the number of online learners actually exceeded the optimistic projections of the previous year, increasing at a 22.9 percent rate, to reach 1.9 million online students nationally for fall 2003.

STUDENTS TAKING AT LEAST ONE ONLINE COURSE – SOUTHERN STATES – FALL 2005

Undergraduate	948,392
Graduate	133,259
First Professional	10,676
Other for-credit	37,514
Total	1,129,841

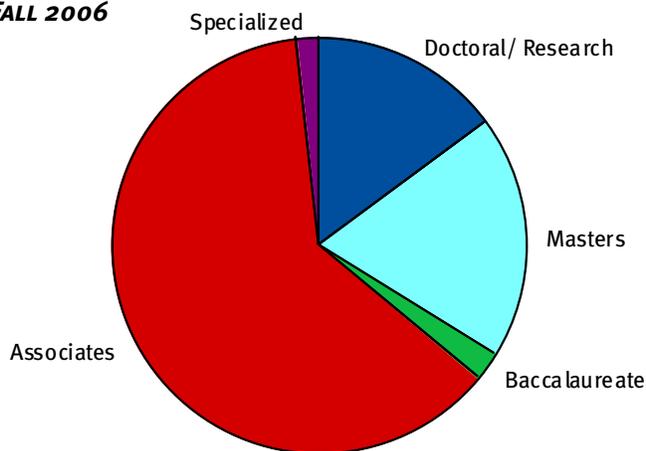
This national increase of about 360,000 new online learning students was matched by the results of the 2005 study, *Growing by Degrees, Online Education in the United States, 2005*, with more than 2.3 million students taking at least one online course during the 2004 fall term. Despite a similar increase in numerical terms, the larger base population meant that the actual percentage growth reported in the 2005 study was somewhat lower (18.2%) than both the previous year’s rate and institutions’ own predictions of their rate of growth. Some observers had postulated that this slowing of the national growth rate of might mark the beginning of a plateau in online enrollments.

LEVEL OF STUDENT TAKING AT LEAST ONE ONLINE COURSE - SOUTHERN STATES - FALL 2005



Contrary to such expectations, the results from the fourth national study clearly show there has been no leveling in the growth rate. Higher education institutions taught nearly 3.2 million online students during the fall term of 2005, an increase of about 850,000 students and a growth rate of 35 percent. This year marks both the largest absolute increase in the number of online students and the largest percentage increase. The overall size of the national higher education student population is estimated to be 17 million with students taking at least one online course now representing close to 17 percent of all higher education students.

TYPE OF INSTITUTION FOR STUDENTS TAKING AT LEAST ONE ONLINE COURSE - SOUTHERN STATES - FALL 2006



The numbers are even more impressive in the South. The number of students taking at least one online course is now over 1.1 million in the sixteen southern states, up from 672,000 the previous year. This represents a growth rate in excess of 68 percent, or twice the rate observed nationally. Who are these 1.1 million southern online students? The overwhelming majority (over 80%) are studying at the undergraduate level with only 12 percent taking graduate level courses and the remainder working towards a first professional degree (chiropractic, dentistry, medicine, optometry, veterinary medicine, law, etc.) or in some other for-credit course.

There are only small differences in the distribution by level of study between online students and the general higher education student body. Using figures from the most recent *Digest of Education Statistics, 2005* to compare enrollment patterns shows the proportion of undergraduates among all online students (86.8%) is virtually the same as the proportion of undergraduates among all southern higher education students (87.0%), while first professional degree students are underrepresented among online students (comprising 1.0% of the online population compared to 1.8% of the overall student body). Graduate level students are a bit overrepresented (12.1% of online versus 11.2% of the general southern student population).

STUDENTS TAKING AT LEAST ONE ONLINE COURSE – SOUTHERN STATES – FALL 2005

	Doctoral/ Research	Masters	Baccalaureate	Associates	Specialized
Undergraduate	92,695	154,283	22,929	669,885	5,722
First Professional	3,284	266	360	502	6,262
Graduate	70,027	52,552	3,496	569	6,614
Other for-credit	3,619	4,304	24	29,502	64
Total	169,625	211,405	26,810	700,459	18,662

Examining enrollment patterns by institution type yields strikingly different results between online education and all of higher education. More than half (62.1%) of all southern online students are studying at two-year Associates institutions, compared to 37.9 percent of the overall higher education student population (*Digest of Education Statistics, 2005*). This pattern is just as pronounced among undergraduate-level students, with Associates institutions teaching nearly seven in ten (70.8%) of all southern undergraduate online students (compared to 43% of all southern undergraduates). Southern Associates institutions are clearly making more inroads among online learners than they have for the higher education student population in general.

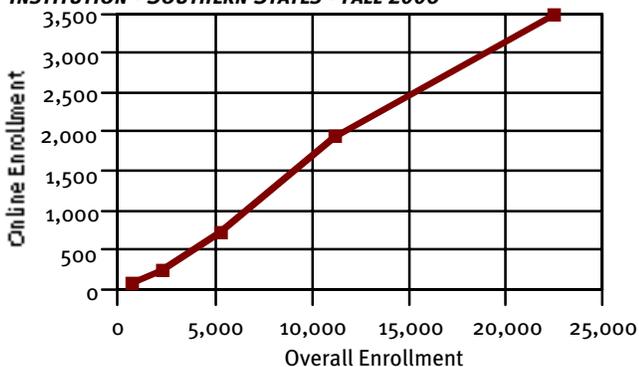
As might be expected, the largest institutions teach the greatest number of online students. This is due not just to their larger size translating into a larger absolute number of students, but also because the larger the institution, the more likely it is to have developed online courses and online programs.

MEAN NUMBER OF ONLINE STUDENTS PER INSTITUTION – SOUTHERN STATES – FALL 2005

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Undergraduate	1,104.3	717.4	101.2	1,012.6	26.2
First Professional	39.1	1.2	1.6	0.8	28.7
Graduate	834.2	244.4	15.4	0.8	30.3
Other for-credit	43.1	20.0	0.1	44.6	0.3

Institution size has a clear impact on the average number of online students at institutions. The largest institutions (overall enrollments of 15,000 or more) are each teaching an average of more than 3,450 online students at the undergraduate level. This compares to

MEAN UNDERGRADUATE ONLINE ENROLLMENT BY SIZE OF INSTITUTION - SOUTHERN STATES - FALL 2006



slightly over half that amount (1,900 online students) for the next smaller-sized institution type (those with overall enrollments between 7,500 and 14,999). The average number of online students enrolled is directly proportional to the size of the institution. For each institution size type, the average number of online students is around 20 percent of the lower end of the size range, except for the smallest of the institutions (those with less than 1,500 total students). The proportion of the student population that is taking at least one online course has begun to reach a significant level for institutions of all sizes.

MEAN NUMBER OF ONLINE STUDENTS PER INSTITUTION – SOUTHERN STATES – FALL 2005

	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Undergraduate	59.2	228.1	707.4	1,922.3	3,462.0
First Professional	10.1	0.9	0.7	5.5	29.1
Graduate	6.7	26.5	64.7	216.5	662.5
Other for-credit	0.2	57.3	17.2	15.5	125.4

Not surprisingly, the Doctoral/Research institutions have the largest average online enrollments since they are more likely on average to be the largest schools. Associates and Master’s institutions also have a sizable average online enrollment (about 1,000 undergraduate students per institution), but the large number of Associates institutions is what accounts for the large number of

online students at such schools. Southern Associates institutions have about 20 percent larger online enrollments, on average, than the national average for these types of schools.

Who Offers Online Courses and Programs?

The largest institutions continue to lead in online offerings.

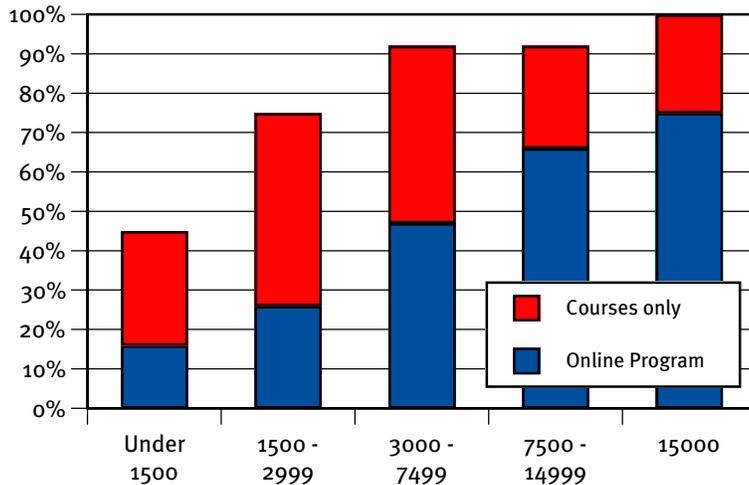
The previous national reports in this series have shown a very uneven distribution of online course and program offerings by type of institution. Public institutions and the largest institutions of all types have consistently been at the forefront of online offerings. Those that are the least likely to offer online education, and typically have the most negative opinions about it, have been the small, private, four-year institutions. This year's results show no major changes to that pattern.

ONLINE OFFERINGS – SOUTHERN STATES – FALL 2005

Online program	34.3
Courses only	35.8
No online	29.8

The preeminence of Public institutions among the providers of online education is evident again this year. Almost all (92%) of the Public institutions in the sixteen-state southern region offer some form of online course or program. This compares to less than one-half (48%) of private institutions.

ONLINE OFFERINGS BY SIZE OF INSTITUTION - SOUTHERN STATES - FALL 2005



Not all schools offer online courses, and not all schools that have online courses offer fully online programs. Examining the pattern of online offerings does show some interesting patterns when the results are compared to the distribution of online students. Southern Doctoral/Research institutions, which enroll 15 percent of all online students, have the greatest penetration of offering online programs as well as the highest overall rate (more than 85%) of having some form of online offering (either courses or full programs). Although Associates schools have by far the largest contingent of online students, they trail Doctoral/Research and match Masters

institutions in the proportion with online programs or any type of online offering. This matches the distribution for the average number of online students per institution, where these three types of institutions were ranked in the same order. The lower proportion of Associates institutions having online offerings coupled with their larger total enrollment speaks to both the larger numbers of this type of institution and to the possibility of a few Associates institutions with very large online enrollments. Only a minority (45%) of Baccalaureate institutions provide any form of online offerings.

ONLINE OFFERINGS – SOUTHERN STATES – FALL 2005

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Online program	59.8%	51.4%	14.3%	34.7%	30.4%
Courses only	28.0%	28.1%	31.2%	44.8%	26.5%
No online	12.2%	20.5%	54.5%	20.5%	43.1%

There is a very strong positive relationship between institution size and online program offerings: the larger the institution, the more likely it is to have a fully online program, and the more likely it is to have some form of online offering. Virtually all (99%) of the very largest southern institutions (over 15,000 total enrollments) have some online offerings, which is more than double the rate observed for the smallest institutions. The proportion of institutions with fully online programs also rises steadily as institution size increases, and about three-quarters of the very largest institutions have fully online programs, compared to only about one-sixth of the smallest institutions.

In for the Long Term?

The proportion of academic leaders reporting online education as critical to their long-term strategy continues to grow.

One criticism of online education has been that while it may serve some students for some specialized areas, it may not be well suited to meet the core needs of higher education. Our previous studies have addressed several aspects of this belief, with mixed results. Topics investigated have included perceptions of the quality of online courses, faculty acceptance (both reported later in this report), core/adjunct faculty mix, and the importance of online education to long-term institutional strategy. The 2005 national study reported that schools were using the same mix of core and adjunct faculty for their online offerings as they were for their face-to-face courses.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION – SOUTHERN STATES

	2003	2004	2005	2006
Agree	49.2%	56.5%	64.9%	60.8%
Neutral	41.1%	35.2%	26.9%	29.9%
Disagree	9.7%	8.2%	8.1%	9.3%

For online education to continue its rapid growth, the Chief Academic Officers who are planning tomorrow's educational offerings must perceive it as important. Chief Academic Officers were asked again this year to rate their level of agreement with the statement that online education is "critical" to the long-term strategy of their school. The response pattern among

southern institutions shows a steady increase in the proportion of Chief Academic Officers who agree with this statement for the first three years. However, the most recent year's data indicates a small decline, a finding at odds with both the long-term southern and national trends for this question. The agreement level among southern Chief Academic Officers (60.8%) still exceeds the national rate (58%) for this question.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION – SOUTHERN STATES

	Doctoral/ Research	Masters	Baccalaureate	Associates	Specialized
2006	67.0%	67.1%	43.0%	68.0%	49.7%
2005	67.3%	68.8%	27.2%	74.7%	72.2%
2004	67.6%	49.5%	33.2%	68.1%	50.3%
2003	63.4%	51.3%	32.1%	58.6%	27.6%

Almost all types and sizes of institutions in the sixteen-state southern region show a steady increase in reporting that online education is critical to their long-term strategy. Associates and Doctoral/Research institutions have maintained consistently high levels of agreement over all four years. Over two-thirds of both institution types now report that online education is critical to their long-term strategy. Masters institutions began the period with lower levels of agreement, but are now the equal of Associates and Doctoral/Research institutions. Baccalaureate institutions, both nationally and in the south, have consistently been the most negative towards online education. Southern Baccalaureate institutions showed the largest increase in agreement relative to last year’s study; however, Chief Academic Officers who agree with this statement remain in the minority at both southern and national Baccalaureate institutions. Southern Specialized institutions show the largest increase in agreement over the four-year period (almost doubling). However, they also display the largest single year drop between 2005 and 2006. Along with Associates institutions (whose smaller decline in agreement level is magnified by their larger numbers), Specialized institutions account for the one year decline in overall level of agreement among all southern institutions.

Are these New Students?

The belief that online education serves new students is pervasive.

A critical question for those who support online education has been to determine whether online learning is merely a different way to serve the existing student base, or whether it provides opportunities for an entirely new group of students. Measuring the specific characteristics of online students is beyond the scope of this study, but we are able to probe the beliefs of those running and planning both face-to-face and online programs and courses. Chief Academic Officers were asked the degree of their belief that “Online education reaches students not served by face-to-face programs.”

ONLINE EDUCATION REACHES STUDENTS NOT SERVED BY FACE-TO-FACE PROGRAMS – SOUTHERN STATES

Agree	73.9%
Neutral	23.4%
Disagree	2.7%

There is an overwhelming level of agreement with this statement among all southern institutions. Unlike virtually every other opinion about online education that we have measured in the four years of these studies, there appears to be no difference among the various types and sizes of institutions in their agreement with this statement. The pattern of southern responses is almost an exact mirror of the national numbers; between two-thirds and three-quarters of all institutions consistently agree with this statement. This indicates a widespread belief that online education provides a level of access to those who would not otherwise be able to attend college on campus.

ONLINE EDUCATION REACHES STUDENTS NOT SERVED BY FACE-TO-FACE PROGRAMS – SOUTHERN STATES

	Doctoral/Research	Masters	Baccalaureate	Associates	Specialized
Agree	79.5%	78.9%	70.8%	76.0%	67.1%
Neutral	14.8%	16.7%	29.2%	20.3%	32.9%
Disagree	5.7%	4.5%	0.0%	3.6%	0.0%

While it is clear that Chief Academic Officers believe that online education serves a new base of students, it is not clear whether they believe that it serves *only* those who would not otherwise be served. There is some evidence that many administrators, especially those using online offerings to provide schedule flexibility for their on-campus students or to free up limited physical space such as classrooms, believe that online learning serves both types of students. Determining the relative proportions of how online education serves these two groups is beyond the scope of this study.

Learning Outcomes

A majority of academic leaders continues to believe learning outcomes for online instruction are as good as or better than those for face-to-face instruction.

The most continually surprising survey finding to those new to online is that a majority of Chief Academic Officers rated learning outcomes for online instruction as the same or

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE – SOUTHERN STATES

	2003	2004	2006
Superior	0.7%	0.5%	1.7%
Somewhat superior	11.8%	6.0%	14.8%
Same	44.2%	54.9%	49.6%
Somewhat inferior	35.6%	29.6%	30.0%
Inferior	7.7%	9.0%	3.8%

superior to those for face-to-face instruction. This result was first observed in 2003, when 56 percent of southern and 57 percent of national academic leaders responded that the learning outcomes in online education were on a par or better than those for face-to-face instruction. This is by no means universal endorsement of the quality of online courses, as almost one-third of southern academic leaders still feel it to be inferior. Nevertheless, the consistency of this majority response and the small but measurable increase in this rating continues to be at odds with the lingering belief that sacrificing quality necessarily results from moving instruction online.

Results for 2004 were very similar, with slightly more than 61 percent of Chief Academic Officers rating the learning outcomes for online instruction as equal to or better than those of face-to-face courses. The most recent results have 65 percent of all respondents rating the learning outcomes as equal to or superior – a relatively small but steady increase. The results for the sixteen-state southern region are very similar to those for the nation as a whole. In both cases there is some improvement between 2003 and 2006 among those rating online as superior to face-to-face instruction, but the level of change is small. With the single exception of Baccalaureate institutions, the largest proportion of all types of institutions rate the learning outcomes as the same. Doctoral/Research institutions have the most positive opinion of the relative learning outcomes. Nationally, 28 percent rated online as superior in 2006, a figure that jumps to 37 percent for southern Doctoral/Research institutions.

Nationally, there is a consistent linear pattern by size of institution; the larger the institution the more favorable its opinion towards online learning outcomes. The southern institutions do not show this same linear relationship by size of institution. Similar to the national results, the smallest southern institutions are the least positive. However, the pattern among mid- and large-sized institutions is different, with the mid-sized southern institutions slightly more positive than the very largest institutions.

Barriers to Widespread Adoption of Online Learning

Fewer than 5 percent of Chief Academic Officers believe there are no significant barriers.

Chief Academic Officers have the primary responsibility for the conduct and planning of each school’s academic offerings, so their opinions about online education play a critical role in understanding how and where online may continue its growth. These academic leaders are very positive about a number of aspects of online education. Previous reports in this series have shown that they believe students are at least as satisfied with online instruction as they are with face-to-face classes, that evaluating the quality of online instruction is no more difficult than for face-to-face, that online education is part of their long-term strategy, and that an increasing majority view the quality of online education as the same or better than face-to-face instruction.

A number of concerns have been apparent as well. Chief Academic Officers have reported that online instruction takes more time and effort than face-to-face courses, that students need more discipline to succeed in online courses, and that much of their faculty have yet to accept the value of online instruction.

THERE ARE NO SIGNIFICANT BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING – SOUTHERN STATES

Agree	3.3%
Neutral	55.7%
Disagree	41.0%

Previous studies have noted the dichotomy of Chief Academic Officers’ positions; on the one hand, they have a high opinion of a number of aspects of online learning, have made it part of their long-term strategy, and are presiding over impressive levels of growth in online enrollments. On the other hand, their issues about faculty acceptance and the time and effort required to teach online may put significant limits on how rapidly their online programs can grow. This year’s study revisits a number of these concerns to see if the substantial growth in the numbers of online learning students has translated to changes in attitudes on these

potential problem issues. Do these academic leaders see significant barriers to the widespread adoption of online learning?

The short answer is that most southern academic leaders see significant barriers to widespread adoption of online learning, as only 3.3 percent of all Chief Academic Officers reported that “There are no significant barriers to widespread adoption of online learning.” This belief is pervasive; even among those who are the most positive towards online instruction (academic leaders at the largest institutions) only 7 percent believe that there are no significant barriers.

THERE ARE NO SIGNIFICANT BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING – SOUTHERN STATES

	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Agree	2.1%	0.0%	6.0%	4.7%	7.0%
Neutral	54.1%	52.3%	54.1%	63.1%	66.7%
Disagree	43.7%	47.7%	39.9%	32.2%	26.4%

The inclusion of the phrase “significant barrier” in the question wording is very deliberate, to differentiate between normal problems of growth for any type of program and those that the academic leaders saw as having far more impact. Survey respondents were presented with a list of possible barriers, and asked to rate

to what degree they considered these to be “significant barriers” to the widespread adoption of online learning. The choices included those issues identified by our previous

studies, as well as questions about the potential demand and acceptance of online instruction.

The most commonly cited barrier by southern academic leaders of almost every institutional size and type was that “Students need more discipline to succeed in online courses.” About two-thirds (67.0%) of all southern institutions agreed that this represents a significant barrier, with results ranging from a low of 52.3 percent (Doctoral/Research institutions) to a high of 79 percent (institutions with total enrollment between 1,500 and 2,999). No other factor was close, with the next-most cited issue being “Greater faculty time and effort required to teach online” was mentioned by about half as many (35.9%) Chief Academic Officers.

BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING (PERCENT AGREEING) – SOUTHERN STATES

Students need more discipline to succeed in online courses	67.0%
Greater faculty time and effort required to teach online	35.9%
Lack of acceptance of online instruction by faculty	21.4%
Online education costs more to develop and deliver	22.6%
Lack of acceptance of online degrees by potential employers	12.5%
Lack of student demand for online courses and degrees	2.9%

It is interesting to note that those institutions which are the most engaged in online education and the most positive about its future are also most likely to cite the need for more discipline on the part of students as a barrier to widespread adoption of online education. It may be that these institutions perceive that self-discipline is a barrier for most of their students, or it may be that experienced institutions are simply more aware of the issue of "self-discipline" than those who are less experienced with online education.

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – SOUTHERN STATES

Agree	32.9%
Neutral	56.6%
Disagree	10.5%

This overall pattern of results among southern institutions masks some important differences among institutional different subgroups. Faculty time and effort (54.5%) was more important for southern Doctoral/Research institutions than the issue of student self-discipline (52.3%). The only group that had a significant level of concern with lack of student demand was the Specialized institutions, and here only a small minority (12.6%) rated this as a significant barrier. As might be expected, those with the greatest numbers of online students (Doctoral/Research, Masters, and Associates schools) had the fewest worries about student demand.

The question of acceptance of an online degree by potential employers was near the bottom of the list of concerns, with the three online leaders (Doctoral/Research, Masters, and Associates schools) again showing a much lower rate of concern with this factor relative to Baccalaureate institutions. Clearly, institutions with the greatest average number of online students have relatively little concern that student demand or employer acceptance will be a significant barrier to the growth of online courses and programs.

An economic and logistic issue – that faculty need greater time and effort to teach online – is consistently the second-most often cited significant potential barrier. Results from last year’s report indicated that institutions with the most experience with online instruction are the most concerned with this issue. Interestingly, a majority of respondents (58%) to last year’s survey felt there was no difference in faculty time and effort between online and face-to-face teaching. It appears that virtually all of those who agree that it takes more faculty time and effort to teach online (35% from last year’s study) also believe that this is a critical barrier (35.9% this year).

BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING (PERCENT AGREEING) – SOUTHERN STATES

	Doctoral/ Research	Masters	Baccalaureate	Associates	Specialized
Students need more discipline to succeed in online courses	52.3%	66.0%	54.1%	76.7%	60.2%
Greater faculty time and effort required to teach online	54.5%	34.7%	34.8%	30.4%	50.8%
Lack of acceptance of online instruction by faculty	28.4%	36.9%	34.5%	14.5%	13.0%
Online education costs more to develop and deliver	35.2%	20.9%	16.5%	25.6%	19.4%
Lack of acceptance of online degrees by potential employers	10.2%	13.0%	24.3%	7.2%	9.5%
Lack of student demand for online courses and degrees	2.3%	1.6%	4.2%	0.7%	12.6%

The issue of faculty acceptance of online education has been an important one for academic leaders since the first survey. Results from this year show no significant changes. Only one in three academic leaders (32.9%) believes that their faculty “accept the value and legitimacy of online education.” This number has shown little change in acceptance over the course of the research (28.8% in 2003 and 34.9% in 2005). The results for 2006 remain very close to those recorded in 2003 for public and private nonprofit institutions. The proportion of academic leaders who believe that their faculty accept the value of online education is nowhere near a majority for any of these institutional categories.

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – SOUTHERN STATES

	Public			Private nonprofit			Private for-profit		
	2003	2005	2006	2003	2005	2006	2003	2005	2006
Agree	39.0%	40.0%	36.6%	17.4%	27.7%	19.1%	**	**	**
Neutral	56.9%	57.1%	50.4%	75.8%	63.8%	69.8%	**	**	**
Disagree	4.0%	2.9%	13.0%	6.8%	8.5%	11.1%	**	**	**

** Results withheld to protect the privacy of reporting institutions.

PARTNER ORGANIZATIONS



Alfred P. Sloan Foundation

The Alfred P. Sloan Foundation makes grants in science, technology and the quality of American life. It's Anytime, Anyplace Learning program seeks to make high quality learning, education and training available anytime and anywhere for those motivated to seek it. The program has paved the way for nearly 3.2 million learners nationwide to take online courses today. www.sloan.org



The College Board

The College Board is a not-for-profit membership association whose mission is to connect students to college success and opportunity. Founded in 1900, the association is composed of more than 5,000 schools, colleges, universities, and other educational organizations. www.collegeboard.com



Southern Regional Education Board

SREB, a nonprofit and nonpartisan organization based in Atlanta, Georgia, advises state education leaders on ways to improve education. SREB was created in 1948 by Southern governors and legislatures to help leaders in education and government work cooperatively to advance education and improve the social and economic life of the region. www.sreb.org



Midwestern Higher Education Compact

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



American Distance Education Consortium

ADEC is a non-profit distance education consortium composed of approximately 65 state universities and land-grant colleges. The consortium was conceived and developed to promote the creation and provision of high quality, economical distance education programs and services to diverse audiences through the most appropriate information technologies available. www.adec.edu



The Sloan Consortium

The Sloan Consortium is the nation's largest association of institutions and organizations committed to quality online education and administered through Babson College and Franklin W. Olin College of Engineering. www.sloan-c.org



Babson Survey Research Group

The Babson Survey Research Group in the Arthur M. Blank Center for Entrepreneurial Research at Babson College conducts regional, national, and international research projects, including survey design, sampling methodology, data integrity, statistical analyses and reporting.

SURVEY METHODOLOGY

The 2006 Sloan Survey of Online Learning was supported by a grant from the Alfred P. Sloan Foundation, conducted by the Babson Survey Research Group, and published by the Sloan Consortium. In order to ensure objectivity, neither the Sloan Foundation nor the Sloan Consortium has editorial control over the survey design, data capture, data analysis, or presentation of the findings.

The sample is composed of all active, degree-granting institutions of higher education open to the public in the sixteen southern states. An email invitation and two reminders with links to a web-based survey form were sent to Chief Academic Officers at these institutions. If there was no designated Chief Academic Officer, the survey was sent to the president of the institution. In some cases, the survey team was notified by the recipient of another, more appropriate recipient, and the survey was forwarded to this individual.

Announced with the publication of last year's report, the Babson Survey Research Group has entered into a data collection partnership with the College Board. The College Board now includes questions for this study of online learning as part of its extensive data collection effort for its Annual Survey of Colleges. The survey team worked with the Southern Regional Education Board (SREB) on a joint outreach to schools in the SREB-member states. All survey respondents were promised a free copy of the national and southern reports. Nationally, the survey universe contains 4,491 institutions; a total of 2,472 responses were received, representing a 55.0 percent overall response rate. Of these, 2,251 responded to a sufficient number of questions to be included in this analysis (50.1%). The southern survey universe is composed of 1,420 institutions; a total of 807 responses were received (56.8% response rate) with 737 responding to a sufficient number of questions to be included in this analysis (51.9%). These responses have been merged with the data from previous survey years (994 national and 313 southern in 2003, 1,170 national and 383 southern in 2004, and 1,025 national and 413 southern responses in 2005) for examination of changes over time.

Data were linked to the College Board Annual College Survey and to the federal Integrated Postsecondary Education Data System database, and responders and nonresponders were compared to create weights, if necessary, to ensure that the survey results reflected the characteristics of the entire population of schools. The responses are compared for 35 unique categories based on the 2005 Carnegie Classification of Institutions of Higher Education (<http://www.carnegiefoundation.org/classifications/>). To ensure that a different response rate from schools in SREB member states did not bias the results, weights were computed independently for schools in SREB states and for those in all other states. These weights provided a small adjustment to the results allowing for inferences to be made about the entire population of active, degree-granting institutions of higher education in the United States and the southern states.

Note: *To encourage participation and ensure objectivity, respondents are promised that no individual-level responses would be released. Results are not reported for table cells that contain a small number of institutions, to prevent the “guessing” of individual responses. No results are presented for southern for-profit institutions for this reason.*

APPENDIX

How Many Students are Learning Online?

STUDENTS TAKING AT LEAST ONE ONLINE COURSE – SOUTHERN STATES – FALL 2005

	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Undergraduate	36,564	63,980	216,600	240,151	391,097
First Professional	6,262	239	206	684	3,284
Graduate	4,132	7,432	19,802	27,046	74,846
Other For-Credit	97	16,067	5,250	1,937	14,162
Total	47,054	87,719	241,858	269,820	483,390

Who Offers Online Courses and Programs?

ONLINE OFFERINGS – SOUTHERN STATES – FALL 2005

	Public	Private, nonprofit	Private, for-profit
Online Program	47.0%	19.6%	**
Courses Only	45.5%	28.1%	**
No online	7.6%	52.3%	**

** Results withheld to protect the privacy of reporting institutions.

ONLINE OFFERINGS – SOUTHERN STATES – FALL 2005

	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Online Program	16.4%	25.6%	47.1%	65.5%	74.5%
Courses Only	29.1%	49.1%	45.1%	25.7%	25.5%
No online	54.5%	25.3%	7.8%	8.8%	0.0%

In for the Long Term?

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION (PERCENT AGREEING) – SOUTHERN STATES

	Public	Private, nonprofit	Private, for-profit
2006	75.5%	41.9%	**
2005	79.6%	48.2%	**
2004	70.6%	37.6%	**
2003	67.6%	28.2%	**

** Results withheld to protect the privacy of reporting institutions.

ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION (PERCENT AGREEING) – SOUTHERN STATES

	Under 1500	1500– 2999	3000– 7499	7500– 14999	15000+
2006	39.8%	63.2%	71.6%	85.5%	84.3%
2005	53.3%	62.4%	72.3%	90.3%	82.8%
2004	40.7%	56.6%	69.0%	79.5%	74.5%
2003	34.1%	43.2%	67.5%	69.6%	80.0%

Are these New Students?

ONLINE EDUCATION REACHES STUDENTS NOT SERVED BY FACE-TO-FACE PROGRAMS – SOUTHERN STATES

	Public	Private, nonprofit	Private, for-profit
Agree	77.9%	70.8%	**
Neutral	17.2%	29.2%	**
Disagree	4.9%	0.0%	**

** Results withheld to protect the privacy of reporting institutions.

ONLINE EDUCATION REACHES STUDENTS NOT SERVED BY FACE-TO-FACE PROGRAMS – SOUTHERN STATES

	Under 1500	1500– 2999	3000– 7499	7500– 14999	15000+
Agree	67.6%	70.1%	79.3%	89.1%	74.6%
Neutral	29.6%	28.6%	16.8%	10.9%	19.4%
Disagree	2.9%	1.3%	3.8%	0.0%	6.0%

Learning Outcomes

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE – SOUTHERN STATES

	Doctoral/ Research			Masters			Baccalaureate		
	2003	2004	2006	2003	2004	2006	2003	2004	2006
Superior	3.5%	0.0%	2.2%	0.0%	3.3%	6.0%	1.7%	0.0%	1.8%
Somewhat Superior	24.7%	6.8%	34.8%	13.7%	7.4%	14.7%	5.0%	4.4%	10.3%
Same	43.5%	68.9%	50.6%	46.3%	46.5%	58.7%	30.1%	28.2%	33.9%
Somewhat Inferior	20.0%	20.3%	7.9%	34.7%	34.0%	20.6%	45.6%	49.1%	41.0%
Inferior	8.2%	4.1%	4.5%	5.3%	8.8%	0.0%	17.6%	18.3%	12.9%

	Associates			Specialized		
	2003	2004	2006	2003	2004	2006
Superior	0.4%	0.0%	0.7%	0.0%	0.0%	0.0%
Somewhat Superior	13.6%	6.1%	12.1%	8.9%	6.9%	25.3%
Same	48.4%	70.1%	49.0%	43.5%	44.0%	46.8%
Somewhat Inferior	31.8%	19.0%	35.1%	41.9%	33.3%	27.9%
Inferior	5.8%	4.8%	3.1%	5.8%	15.7%	0.0%

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE – SOUTHERN STATES

	Under 1500			1500–2999			3000–7499		
	2003	2004	2006	2003	2004	2006	2003	2004	2006
Superior	0.6%	0.0%	0.9%	0.0%	0.6%	3.9%	1.0%	1.4%	1.0%
Somewhat Superior	7.6%	3.6%	9.7%	10.4%	4.6%	7.7%	10.7%	8.0%	25.5%
Same	33.6%	49.5%	47.0%	42.9%	61.0%	43.2%	64.5%	51.4%	57.3%
Somewhat Inferior	46.3%	28.5%	34.3%	39.8%	27.4%	41.9%	20.8%	37.6%	15.2%
Inferior	11.9%	18.4%	8.2%	6.9%	6.4%	3.2%	2.9%	1.4%	1.0%

	7500–14999			15000+		
	2003	2004	2006	2003	2004	2006
Superior	0.0%	0.0%	1.9%	2.8%	0.0%	1.6%
Somewhat Superior	31.4%	11.7%	17.3%	22.4%	8.2%	17.2%
Same	47.1%	68.5%	44.9%	48.6%	61.2%	57.8%
Somewhat Inferior	19.6%	15.3%	35.9%	20.6%	30.6%	23.4%
Inferior	2.0%	4.5%	0.0%	5.6%	0.0%	0.0%

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE – SOUTHERN STATES

	Public			Private, nonprofit			Private, for-profit		
	2003	2004	2006	2003	2004	2006	2003	2004	2006
Superior	0.9%	0.3%	1.2%	0.8%	1.0%	3.4%	**	**	**
Somewhat Superior	16.8%	8.3%	18.9%	4.5%	5.8%	14.4%	**	**	**
Same	53.4%	62.1%	51.6%	32.2%	34.8%	38.3%	**	**	**
Somewhat Inferior	26.1%	27.0%	26.3%	46.4%	40.1%	35.1%	**	**	**
Inferior	2.9%	2.3%	2.0%	16.1%	18.3%	8.8%	**	**	**

** Results withheld to protect the privacy of reporting institutions.

Barriers to Widespread Adoption of Online Learning

THERE ARE NO SIGNIFICANT BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING – SOUTHERN STATES

	Public	Private, nonprofit	Private, for-profit
Agree	4.0%	3.7%	**
Neutral	52.4%	53.2%	**
Disagree	43.6%	43.2%	**

THERE ARE NO SIGNIFICANT BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING – SOUTHERN STATES

	Doctoral/ Research	Masters	Baccalaureate	Associates	Specialized
Agree	2.4%	5.7%	2.2%	2.5%	6.6%
Neutral	60.7%	43.9%	51.8%	60.3%	56.6%
Disagree	36.9%	50.4%	46.0%	37.1%	36.8%

BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING (PERCENT AGREEING) – SOUTHERN STATES

	Public	Private, nonprofit	Private, for-profit
Students need more discipline to succeed in online courses	69.6%	61.7%	**
Greater faculty time and effort required to teach online	39.8%	38.2%	**
Lack of acceptance of online instruction by faculty	22.6%	29.0%	**
Online education costs more to develop and deliver	21.5%	20.0%	**
Lack of acceptance of online degrees by potential employers	9.9%	18.5%	**
Lack of student demand for online courses and degrees	0.7%	7.9%	**

** Results withheld to protect the privacy of reporting institutions.

BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING (PERCENT AGREEING) – SOUTHERN STATES

	Under 1500	1500–2999	3000–7499	7500–14999	15000+
Students need more discipline to succeed in online courses	66.5%	79.0%	64.1%	66.4%	50.7%
Greater faculty time and effort required to teach online	38.5%	26.6%	37.5%	32.1%	46.3%
Lack of acceptance of online instruction by faculty	23.0%	24.8%	18.4%	17.9%	18.5%
Online education costs more to develop and deliver	25.4%	20.0%	14.8%	38.1%	22.2%
Lack of acceptance of online degrees by potential employers	16.3%	14.8%	7.8%	6.4%	11.9%
Lack of student demand for online courses and degrees	6.0%	1.6%	1.0%	0.0%	1.5%

FACULTY ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – SOUTHERN STATES

	Doctoral/ Research			Masters			Baccalaureate		
	2003	2005	2006	2003	2005	2006	2003	2005	2006
Agree	25.3%	28.7%	18.2%	23.3%	32.7%	22.0%	23.3%	20.8%	25.3%
Neutral	67.5%	69.3%	69.3%	74.6%	60.5%	66.4%	61.3%	61.4%	59.4%
Disagree	7.2%	2.0%	12.5%	2.1%	6.9%	11.6%	15.4%	17.8%	15.3%

	Associates			Specialized		
	2003	2005	2006	2003	2005	2006
Agree	36.1%	38.2%	37.5%	14.1%	46.2%	25.0%
Neutral	59.9%	57.1%	53.7%	85.9%	53.8%	63.4%
Disagree	4.0%	4.7%	8.8%	0.0%	0.0%	11.6%

FACULTY ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – SOUTHERN STATES

	Under 1500			1500–2999			3000–7499		
	2003	2005	2006	2003	2005	2006	2003	2005	2006
Agree	18.2%	29.3%	34.4%	26.0%	28.6%	23.1%	44.8%	49.1%	40.7%
Neutral	76.0%	62.5%	52.8%	68.5%	66.4%	75.2%	51.0%	42.2%	50.1%
Disagree	5.8%	8.2%	12.8%	5.5%	5.0%	1.6%	4.2%	8.7%	9.1%

	7500–14999			15000+		
	2003	2005	2006	2003	2005	2006
Agree	28.4%	39.7%	26.3%	51.4%	34.8%	34.3%
Neutral	65.7%	59.0%	48.1%	45.7%	65.2%	56.7%
Disagree	5.9%	1.3%	25.6%	2.9%	0.0%	9.0%

Making the Grade: *Online Education in the United States, 2006 - Southern Edition* is based on data collected for the fourth annual report on the state of online education in U.S. Higher Education. Supported by the Alfred P. Sloan Foundation and based on responses from over 700 southern colleges and universities, this year's study, like last year's, is aimed at answering some of the fundamental questions about the nature and extent of online education:

- Has the growth in online enrollments begun to plateau?
- Who offers online courses and programs?
- Is online education becoming part of long-term strategy for most schools?
- How do Chief Academic Officers rate the quality of online courses?
- What barriers do academic leaders see to widespread adoption of online learning?

The survey analysis is based on a comprehensive sample of active, degree-granting institutions of higher education in the sixteen southern states.



SREB



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