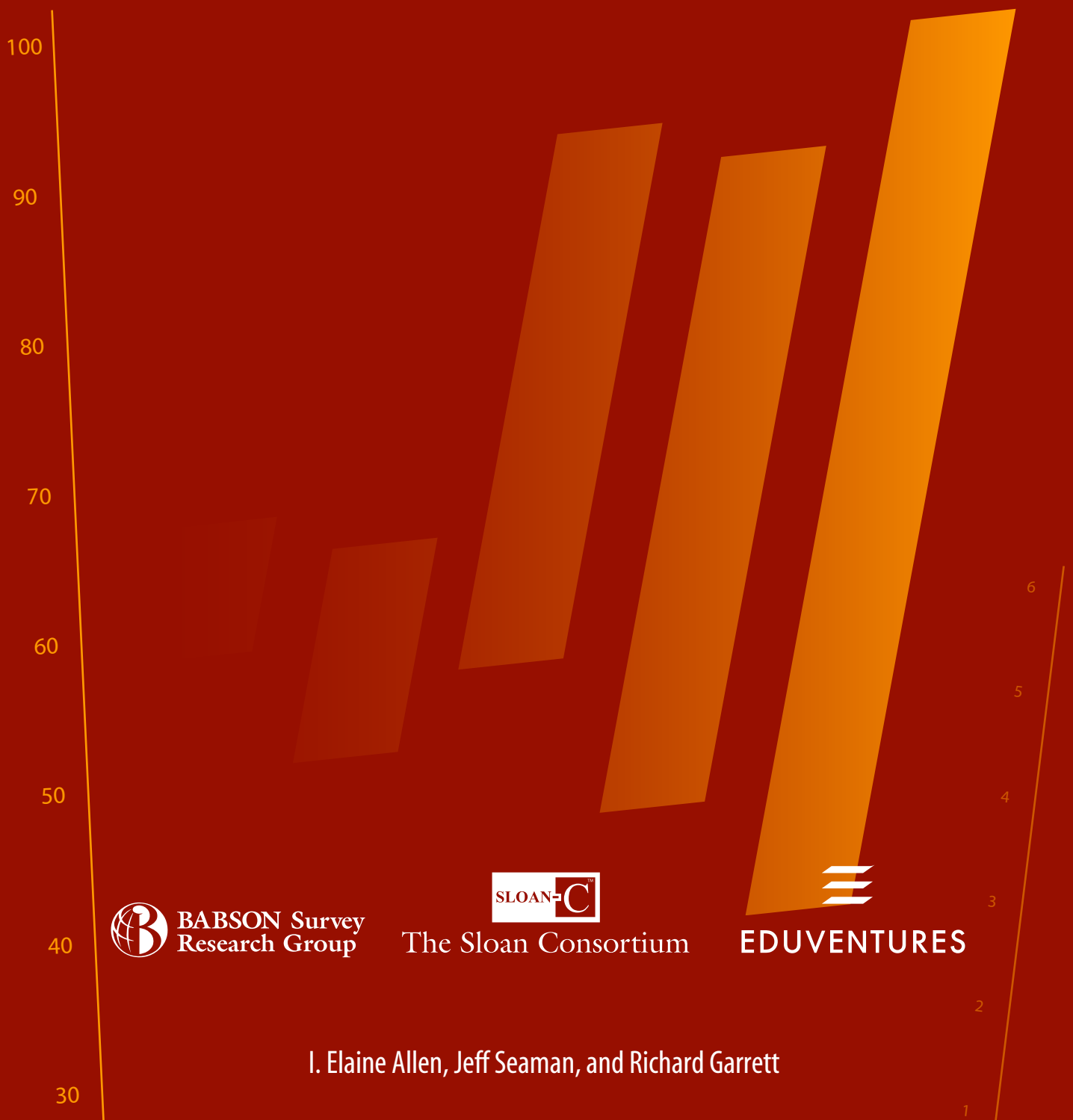


Blending in

The Extent and Promise of Blended Education in the United States



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I. Elaine Allen, Ph.D.

Associate Professor of Statistics & Entrepreneurship
Co-Director, Babson Survey Research Group
Babson College

Jeff Seaman, Ph.D.

Chief Information Officer, Survey Director
The Sloan Consortium
Olin and Babson Colleges
Co-Director, Babson Survey Research Group
Babson College

Richard Garrett

Senior Research Analyst
Eduventures, LLC

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EXECUTIVE SUMMARY

Blending In: The Extent and Promise of Blended Education in the United States builds on the series of annual reports on the state of online education in U.S. Higher Education. This study, like the previous reports, is aimed at answering some of the fundamental questions about the nature and extent of education in the United States. Unlike the previous reports that focused exclusively on online learning, the current report examines blended (also called hybrid) instruction. The findings are based on three years of responses from a national sample of over 1,000 colleges and universities. Additional results are presented from an Eduventures-conducted national survey of 2,033 U.S. adults interested in postsecondary education in the next three years.

Both fully online and blended course offerings (i.e., those that combine the elements of an online course with those of face-to-face instruction) have grown dramatically in American higher education in recent years. There is a belief among some that blended courses hold at least as much promise as fully online ones. However, the path of evolution from face-to-face learning to fully online courses is not transparent. It is becoming clear that blended learning is generally *not* part of an institutional transition strategy from face-to-face to fully online courses, but rather a discrete option which institutions choose on its own merits. In our analyses of survey data on online learning, we reported that U.S. Higher Education has embraced online learning. Some of the evidence presented in these studies to support this conclusion includes:

- Online students, like the overall student body, are overwhelmingly undergraduates.
- Online enrollments continue to grow, reaching 3.18 million for fall 2005.
- An increasing number of academic leaders say that offering online courses is critical to their institution's long-term strategy.
- A majority of academic leaders believe that the learning outcomes for online education are now equal to or superior to those for face-to-face instruction.

What does our survey data say about the growth of blended (or hybrid) courses and programs relative to fully online ones? What did these academic leaders think about blended courses, and how did they perceive them as part of their long-term strategic goals?

ARE BLENDED COURSES MORE PREVALENT THAN FULLY ONLINE COURSES?

Background: With a perception that blended learning is easier to offer than fully online courses, more students at more diversified types of institutions may be taking advantage of these courses.

The evidence: Blended courses are not more prevalent than fully online courses. Very similar proportions of schools report offering blended courses as offer online courses, with slightly more citing online offerings than blended. There is also little evidence of growth in blended course offerings.

- Only at baccalaureate institutions, where online education has the smallest penetration rate, are a slightly greater or an equal percent of blended courses offered.
- Offerings of blended courses decreased slightly between 2003 and 2005 while online course offerings grew.
- There are a slightly larger percent of blended program offerings than online programs across all disciplines.

DO BLENDED COURSES HOLD MORE PROMISE THAN FULLY ONLINE COURSES?

Background: Perceived by some as a “best of both worlds” approach compared to fully online courses, blended learning may have a higher acceptance and a higher perceived value (closer to face-to-face learning) than online courses.

The evidence: Academic leaders do not regard blended courses as holding more promise than fully online courses. This view appears to be true regardless of size and type of school with the only exception being the small number of schools which offer blended courses but not online courses.

- Overall, only 38 percent of respondents agreed that “blended courses hold more promise than online courses” in 2004. This is a decrease from 46 percent agreement in 2003.
- Most of the respondents agreeing with the statement were from smaller, private, not-for-profit, and baccalaureate institutions.
- Only schools offering blended but not online courses had a majority likely to agree with this statement and this percentage dropped from 72 percent in 2003 to 68 percent in 2004.

ARE BLENDED COURSES A STEPPING STONE FOR INSTITUTIONS ON THE WAY TO FULLY ONLINE COURSES?

Background: With faculty less likely to embrace online than face-to-face courses, and with fully developed brick and mortar campuses, are blended courses a good compromise position for the long term, or are these courses just the first step towards online degree programs?

The evidence: The answer appears to be that blended courses are *not* just a stepping stone to offering online courses or programs. There are far more blended courses and programs being offered than would be present if institutions were using them only as a transition to fully online. Schools with established online courses and programs have a smaller percentage of blended courses than schools with no or only a small percentage of courses online. The percentage of reported blended course offerings remained stable from 2002–2005 while the percentage offered online has increased.

- Schools report offering an average of 10.6 percent of their course sections online in 2005, up from 6.5 percent in 2003, while the respective percentages for blended offerings shown a steady decline from 2003 (6.8%) to 2005 (5.6%)
- The number of institutions that offer blended courses without offering any online courses is very small at private, non-profit institutions (17.1%), public institutions (3.8%), and private, for-profit institutions (6.6%).

WHAT IS THE CONSUMER EXPERIENCE AND PERCEPTION OF ONLINE AND BLENDED DELIVERY OPTIONS?

Background: Higher Education institutions have been investing in both online and blended courses and programs. Are these decisions supported by consumer preferences?

The evidence: The answer is positive, the market for online/blended delivery has a lot of room for growth. Consumer preference for online and blended delivery far exceeds reported experience, and consumer openness to these delivery modes far exceeds preference.

- Consumer data does not suggest an endorsement of a particular mode of delivery, but rather reflects both uncertainty as to the inherent value of particular modes and an openness to consider a variety of modes.
- The situation is dynamic. As consumer experience grows and becomes more sophisticated, the balance between consumers' who regard delivery mode as a primary versus secondary consideration may shift.

INTRODUCTION

For a number of years the Babson Survey Research group has conducted, and the Sloan Consortium published, annual reports on the state of online education in U.S. higher education. These reports have examined both the changing opinions of key academic decision makers as well as charting the trends in online offerings and enrollments. The intention from the very beginning was to provide companion reports examining blended (or hybrid) education. The initial attempt at this, however, quickly encountered a serious roadblock: Schools were not able to provide accurate reports on their enrollments in blended courses. Academic leaders told us that they did not have any reliable means of measuring the number of students enrolled in blended courses. Unlike fully online courses that make no use on on-campus classroom facilities, blended courses often appear identically to face-to-face classes on many institution's reporting systems.

Subsequent survey instruments were revised to reflect the inability to accurately report blended enrollments, concentrating instead on opinion issues and measuring the extent of blended course and program penetration (many academic leaders did tell us they could report if they offered blended courses and/or programs, the problem arose when we asked for counts of students in those courses). This report is based on data collected from the first four survey years, 2003 to 2006. It is our intent to continually expand the number of questions addressing blended learning in subsequent survey and provide additional, more detailed, reports in the future.

To complement the institutional survey with consumer data, Sloan-C teamed with Eduventures LCC, a research and consulting firm specializing in education. In 2006, Eduventures collected what is thought to be the most comprehensive set of consumer data on online/blended higher education available. Eduventures is a leader in analysis of the online higher education market, and runs an "Online Higher Education" collaborative, a membership program for schools wishing to grow their online enrollments and operate more effectively online. Members of the collaborative include many of the leading providers of online higher education in the United States. As part of membership, schools gain access to unique datasets and analysis, as well as custom research opportunities.



WHAT IS BLENDED LEARNING?

The focus of this report is blended (sometimes called hybrid) education. In order to be consistent with previous work, we have applied the same definitions used in our prior reports. These definitions were presented to the respondents at the beginning of the survey, and repeated in the body of individual questions where appropriate.

The primary focus of this report, blended courses and programs, are defined as having between 30 percent and 79 percent of the course content 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, online courses, are defined as having at least 80 percent of the course content delivered online.

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 which 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.

The definition of an online program or blended program is similar to the definition used for courses; an online program is one where at least 80 percent of the program content is delivered online and a blended program is one where between 30 and 79 percent of the program content is delivered online. Institutions have a number of options in how they can choose to structure a blended program – they might, for example, craft a program as a mix of fully online and face-to-face courses. Alternatively, an institution may decide the best option for a particular program is for all the courses to be blended in nature. In this case the program might not contain any fully online or face-to-face courses. Obviously, institutions can mix and match between these two approaches. As long as the proportion of the program content delivered online falls in the 30 to 79 percent range, the program is classified as blended for purposes of this study.

Schools may offer online or blended 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, bachelor's, master's, doctoral, and professional programs and by specific discipline.

A slightly different set of definitions were used for the consumer portion of this study. As discussed above, the Sloan Consortium defines blended education as course delivery where 30-79% of content is delivered online. To avoid the difficulty many consumers would face judging whether a course or program experience fell within the 30-79% range, the Eduventures consumer survey employed more broadly-worded categories. For questions asking about consumer experience, a simple distinction between totally and partly online was used. For consumer preference and related questions, two categories were used to cover the blended space: course/program that is primarily online, and course/program with an equal balance between online and on-campus. While these categories do not precisely match those employed by Sloan-C, there is substantial overlap.

DETAILED SURVEY FINDINGS

Who Offers Blended Courses?

Public institutions have the highest penetration rate for blended courses.

Survey results show that almost 55 percent of all institutions offer at least one blended course while 64 percent offer at least one online course. This single statistic masks considerable variability among different types of institutions; however, for all levels of education, the percentage of schools offering at least one online course is larger than those offering at least one blended course. Of particular interest is the extent to which institutions that provide a particular type of offering in a face-to-face setting also provide the same type of offering in a blended setting. In other words, what proportion of institutions that offer a particular type of face-to-face course or program also provide a blended version of the same type of offering? The following analysis examines the penetration rate for online offerings by course type, program type, and program discipline.

FACE-TO-FACE, ONLINE, AND BLENDED COURSE OFFERINGS - FALL 2004

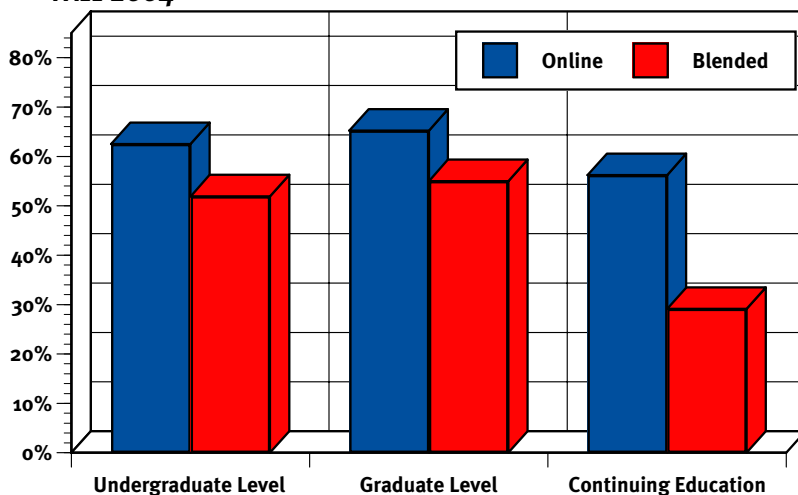
	Face-to-face	Online	Blended
Undergraduate Level	88.5%	55.3%	45.9%
Graduate Level	39.7%	25.9%	21.9%
Continuing Education	38.6%	21.7%	11.3%

Examining the respective online and blended penetration rates by type of school shows online penetration rates are about 20 percent higher than blended penetration rates at the undergraduate level and

about 13 percent higher at the graduate level. For continuing education courses, online penetration rates are almost double those for blended courses.

As has been noted in our previous reports on online learning, public institutions lead other types of schools in offering online education. Similarly, they have a large lead in the provision of blended courses as well, with 79 percent offering at least one blended course at the undergraduate level. This compares to 32 percent of private nonprofits and only 25 percent among the private for-profit institutions. It is interesting to note that for public institutions there is a higher penetration rate for blended courses at the undergraduate level, whereas at private schools there is a higher penetration rate for blended courses at the graduate level. The penetration rate for blended courses

FIGURE 1: ONLINE AND BLENDED COURSE PENETRATION RATES - FALL 2004



lags for continuing education courses in all types of institutions, perhaps indicating that blended courses are not seen as appropriate for this type of audience.

ONLINE AND BLENDED COURSE PENETRATION RATES - FALL 2004

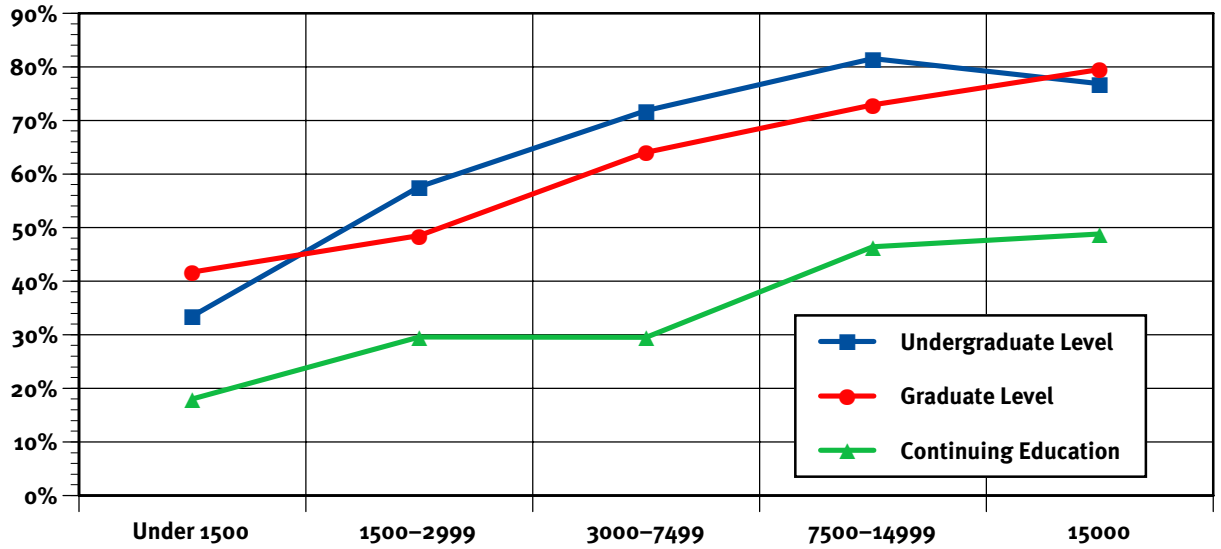
	Public		Private, nonprofit		Private, for-profit	
	Online	Blended	Online	Blended	Online	Blended
Undergraduate Level	87.2%	79.4%	36.0%	32.0%	63.5%	25.4%
Graduate Level	77.1%	74.5%	53.2%	45.0%	143.4%	55.3%
Continuing Education	70.0%	35.1%	31.2%	21.2%	359.4%	33.3%

Institution size is also a key factor in determining whether blended and online courses are offered. The smaller the institution, the less likely it is to offer either blended or fully online courses. This pattern holds true for blended courses at all levels; the larger the school, the more likely it is to offer blended courses at the undergraduate level, the graduate level, and for continuing education. Blended course offerings increase dramatically as institutional size increases.

ONLINE AND BLENDED COURSE PENETRATION RATES - FALL 2004

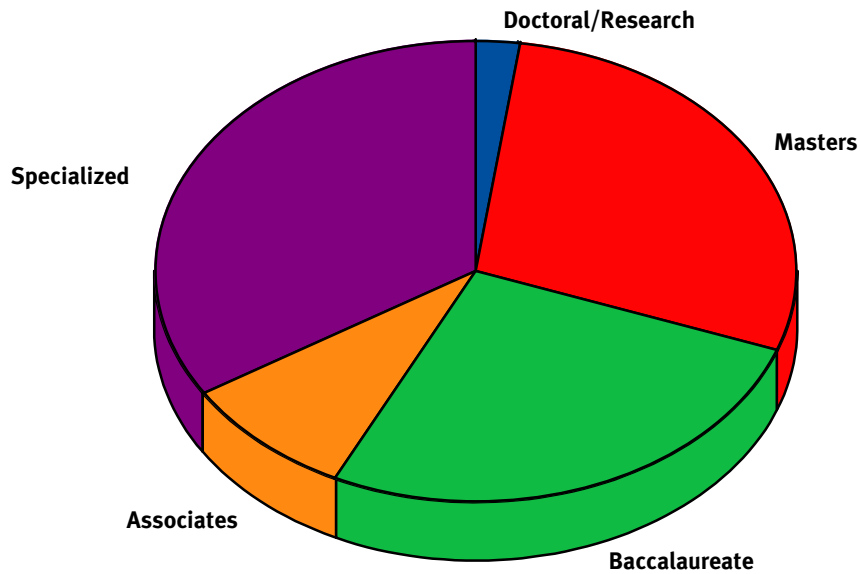
	Under 1500		1500–2999		3000–7499		7500–14999		15000+	
	Online	Blended	Online	Blended	Online	Blended	Online	Blended	Online	Blended
Undergraduate Level	46.6%	33.5%	68.3%	57.6%	80.2%	71.8%	89.9%	81.5%	78.3%	76.8%
Graduate Level	55.6%	41.7%	57.6%	48.5%	69.5%	64.0%	84.1%	72.9%	84.2%	79.5%
Continuing Education	39.0%	18.0%	60.5%	29.6%	57.2%	29.5%	79.8%	46.4%	74.7%	48.8%

FIGURE 2: PENETRATION RATE OF BLENDED COURSES BY SIZE OF SCHOOL



The picture is quite different for the small number of schools that offer blended but no online courses, however. Among these institutions the specialized schools constitute the largest proportion, with doctoral/research and associate’s degree-granting institutions making up much smaller proportions as indicated in Figure 3. This is an important finding

FIGURE 3: DISTRIBUTION OF SCHOOLS THAT OFFER BLENDED BUT NO ONLINE COURSES

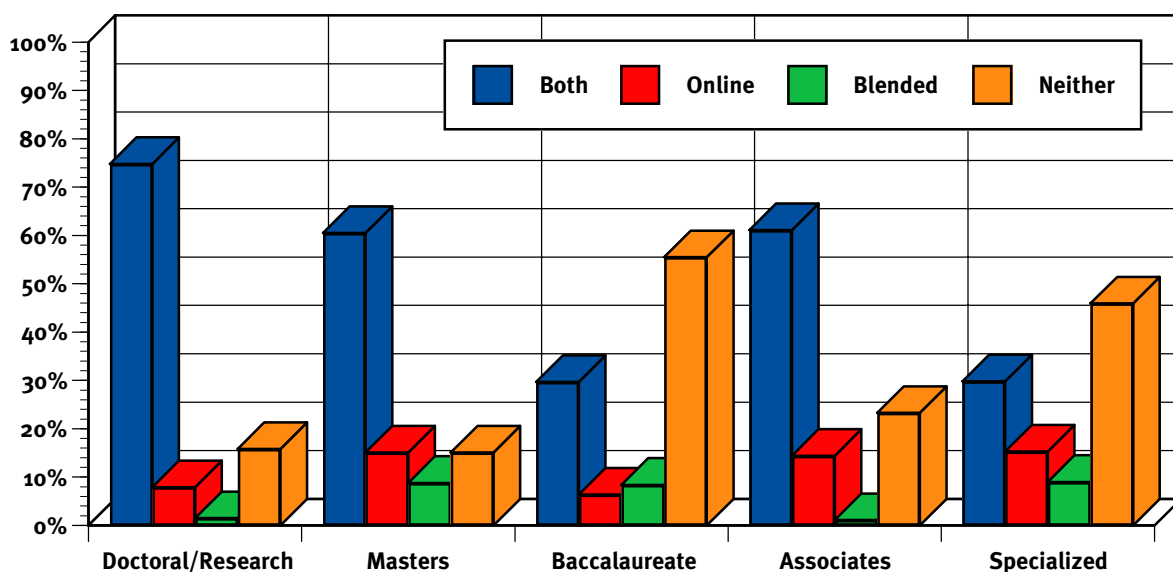


relative to the question of whether blended courses are part of an institutional transition strategy from face-to-face to fully online courses. If blended courses were a universal transition strategy for institutions moving their offerings from only face-to-face to face-to-face and online, the distribution of schools in this stage (having face-to-face and blended, but no online) should be similar to the distribution of those who have completed the transition. However, this is not the case; institutional offerings, and the path they take to get to those offerings, appear to be widely varied. A small number have chosen to add only blended and no online to their offerings, and a much larger number offer both blended and online.

There are dramatic differences in the pattern of online and blended course offerings by Carnegie class. Among schools that have decided to offer online or blended courses, the most popular choice by far is to offer both. As Figure 4 indicates, 74.8 percent of doctoral/research institutions offer both online and blended courses, compared to only 29.7 percent of the baccalaureate institutions. Baccalaureate, and to a lesser extent specialized schools are the only types of institutions with substantial numbers of schools not offering either blended or online courses.

Among the smaller number of institutions that have elected to offer only one type of online or blended course, there is a slightly higher percentage of both doctoral/research and master's institutions offer only online courses as compared to offering only blended ones, while twice as many baccalaureate institutions offer only blended courses as compared to offering only online ones. Associate's degree granting institutions more closely resemble the doctoral/research or master's institutions.

FIGURE 4: TYPE OF COURSES OFFERED BY TYPE OF INSTITUTION - FALL 2004



What Percent of All Course Sections are Taught as Blended?

While the percentage of institutions that offer at least one blended course is relatively high, the percentage of reported blended course sections is still quite small. Our previous studies provided some evidence that chief academic officers may not be aware of all blended courses being taught at their institution. Unlike an online course, which is often recorded differently than a face-to-face course, a faculty member may convert a face-to-face course to blended with no change in how the course is recorded by the institution. Because both face-to-face and blended courses require on-campus services such as room assignments and final exam schedules, they are often treated identically by institutions. The actual number of blended courses may, therefore, be higher than what was reported by our respondents. While the overall reported rate of blended courses may be understated, there is no reason to think that this understatement is worse on one year than the next, so year-to-year comparisons can still be made.

In fall 2005, an average of 5.6 percent (median = 1%) of all course sections were taught as blended courses compared to 10.6 percent for online course sections (median = 5%). The percentage of courses taught as blended has shown a steady decline over the three survey

years (moving from 6.8% in 2003 to 6.6% in 2004 and 5.6% in 2005). During this same time period the percentage of courses taught as fully online has continued to grow (6.5% in 2003, 8.2% in 2004, and 10.6% in 2005). The median number of courses taught as blended has remained at 1 percent for all three survey years, while the median for online courses has grown from 2 percent in 2003 to 5 percent in 2005.

Blended course section offerings showed the greatest overall decline among the largest schools (11.4% to 8.4%); however, the median increased from 2 percent to 3 percent for this group, perhaps indicating that it is only a few of the institutions with the largest percentages which have shown the greatest decrease. The largest increase in the percentage of blended courses was among the large mid-size schools (8.0% to 9.9%). When examined by Carnegie class, associate’s institutions are the only type of institution to show an increase in blended course sections over the three year period (4.6% to 5.7%) and doctoral/research institutions exhibit the largest decrease (14.3% to 7.9%). Institutions of all sizes and all Carnegie classes show an increase in the number of course sections offered online from fall 2003 to fall 2005.

How Extensive Are Blended Program Offerings?

As previously noted, a blended program can be created by blending each course in the program, by mixing face-to-face courses with fully online courses, or by some combination of the two approaches. As long as the end result is that the proportion of the program content delivered online falls between 30 to 79 percent it is considered a blended program for purposes of this study. An institution that offers a blended program composed of a mix of face-to-face and fully online courses, for example, would be counted as having online offerings when we are examining *courses*, but treated as having a blended offering when we move to examining *programs*. Thus we would expect to find penetration rates for blended *programs* to be relatively higher than those for blended *courses*.

While generally smaller than online and face-to-face program offerings, the proportion of programs offered as blended covers a wide spectrum. Overall, 36 percent of schools offer at least one blended program. The majority of these programs are associate’s degree programs (18%) or certificate programs (17%) with only a very small number of doctoral programs (3%). Only doctoral programs have a larger proportion of blended vs. online program offerings (3% vs. 2%). Penetration rates by type of school show different patterns of blended versus online program adoption.

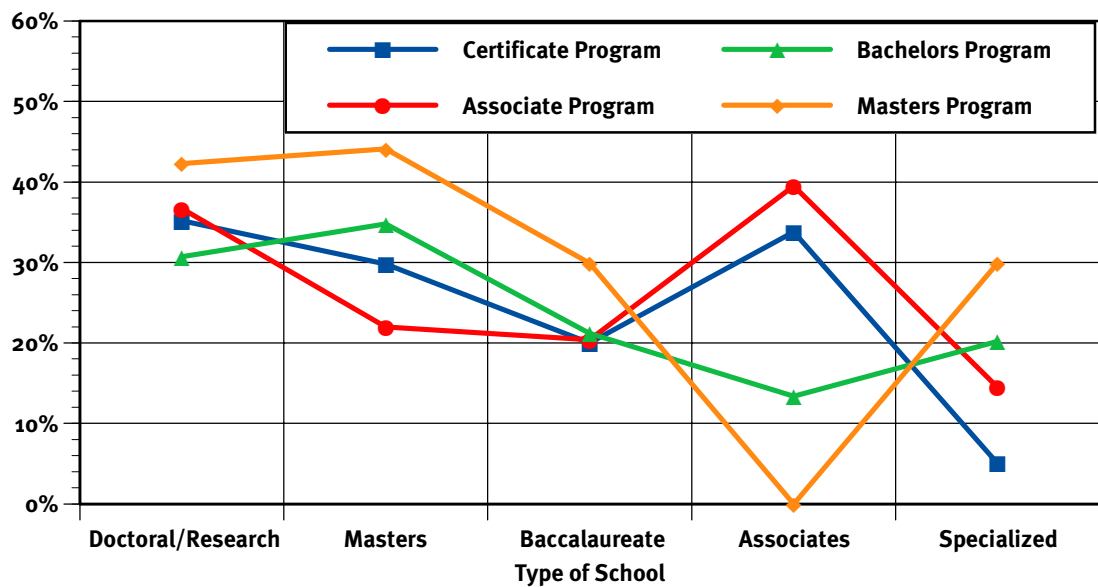
ONLINE AND BLENDED PROGRAM PENETRATION RATES - FALL 2004

	Public		Private, nonprofit		Private, for-profit	
	Online	Blended	Online	Blended	Online	Blended
Certificate	45.4%	39.5%	25.8%	11.8%	20.4%	14.1%
Associate	50.7%	47.4%	18.9%	10.1%	43.3%	20.9%
Bachelors	37.6%	36.7%	20.7%	19.5%	64.4%	30.5%
Master’s	55.9%	48.7%	34.9%	31.2%	77.5%	60.1%
Doctoral	13.1%	14.9%	9.5%	15.2%	62.5%	62.5%
Professional	27.1%	21.5%	8.1%	6.6%	0.0%	0.0%

Public institutions are in the lead among those offering certificate, associate's, and Bachelors degree blended programs. Among private, nonprofit schools, the only blended program that approaches the penetration rate of the online options is for a master's degree. Although most private, for-profit institutions do not offer master's or doctoral programs, the high penetration rates indicates that both online and blended options are very well received among these schools. Only the public institutions show strong penetration rates in certificate and Professional program offerings.

Examining blended program offerings by institution size shows few discernible patterns or trends. Only master's program offerings exhibit a linearly increasing trend as institution size increases. Bachelor degree programs and profession programs also exhibit this trend, with the exception of the largest schools where the penetration rate for both program types is much smaller.

FIGURE 5: PENETRATION RATE OF BLENDED PROGRAMS BY TYPE OF SCHOOL



Comparing penetration rates by Carnegie class shows that blended program offerings are almost identical for master's and baccalaureate degree programs but lag behind online doctoral programs while exhibiting the same pattern of adoption across Carnegie class.

What Disciplines Offer Blended Programs?

Business and liberal arts and sciences have the greatest penetration among blended programs.

As the reported penetration rates indicate, programs which institutions offer face-to-face are somewhat more likely to also be offered as a blended program than as an online program. This suggests that while online course offerings appear to be growing faster than blended courses, it may be easier to move a program from face-to-face to a blended format than it is to move it to fully online.

ONLINE AND BLENDED PROGRAM PENETRATION RATES – FALL 2003

	Online	Blended
Business	42.7%	47.9%
Computer and Information Sciences	35.1%	41.5%
Education	24.9%	36.5%
Health Professions and Related Sciences	31.4%	43.5%
Liberal Arts and Sciences, General Studies, Humanities	40.2%	47.8%
Psychology	23.6%	27.1%
Social Sciences and History	28.4%	31.6%
All Other Programs	36.2%	40.1%

When examined by type of institution, public institutions have the most consistent penetration rates, with most discipline areas falling in the 40-50 percent range except for Social Sciences and History (35%) and Liberal Arts and Sciences (60%). Private, nonprofit schools have consistently much lower penetration rates relative to public institutions, with only one discipline area (Business) having a penetration rate at private nonprofits of less than 10 percentage points relative to publics (43.6% vs. 49.8%). Private, for-profit institutions show the most variability in penetration rates ranging from very high (84% in business; 92% in education) to relatively low (e.g., 28% in psychology and 35% in social sciences and history).

It is unclear how respondents considered courses that were taken before an individual has declared a major. At many four-year institutions, for example, students often select from a wide range of courses from different departments during their first two years before concentrating on courses related to their major during their final two years. If such preliminary courses are considered part of the particular program, then according to the definitions provided to the respondents, they should have been considered in determining if the program met the definition of blended

or not. If, on the other hand, the particular program requirements were merely to have a minimum number of credits before beginning the study of a particular major, the initial courses would not have been considered as part of the specific program.

Who Teaches Blended Courses?

The majority of blended courses are taught by core faculty.

The most recent report on online education in the United States found that the majority of institutions were using primarily core faculty to teach their online courses (*Growing by Degrees: Online Education in the United States 2005*, The Sloan Consortium, www.sloan-c.org). Survey respondents were asked to categorize their use of core or adjunct faculty to teach online, blended, and face-to-face courses as “exclusively” one type or the other, “mostly”, or a “roughly equal mix of core and adjunct faculty.” Respondents indicated that core faculty are used to teach online courses about as frequently as they are used to teach face-to-face courses. The percent of institutions reporting that core faculty are teaching blended courses is larger than the percent reporting that core faculty are teaching face-to-face courses.

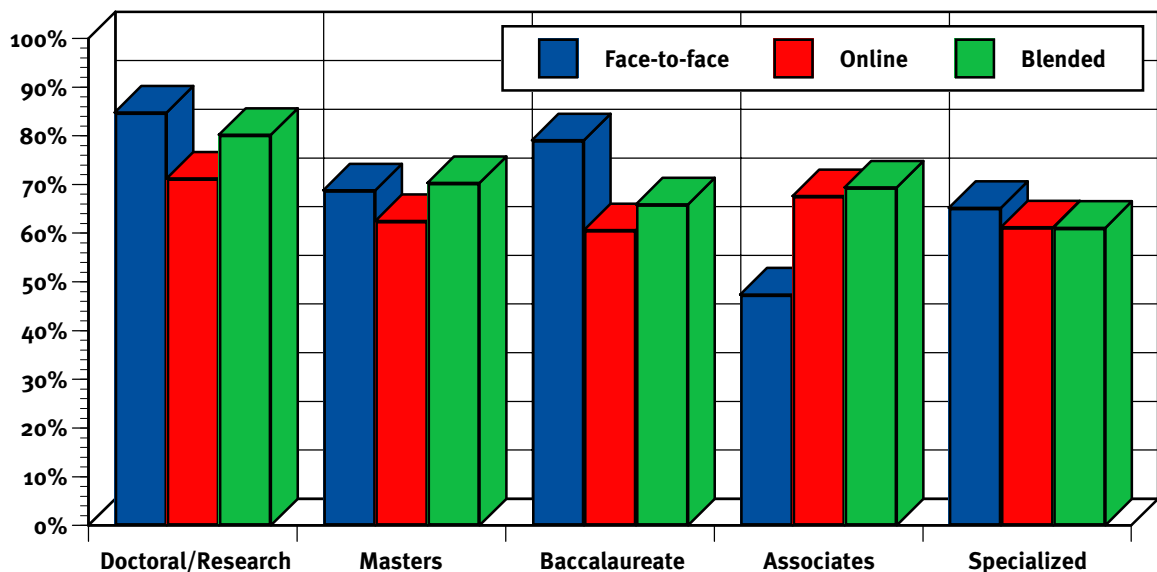
WHO TEACHES FACE-TO-FACE, ONLINE, AND BLENDED COURSES - FALL 2004

	Face-to-face	Online	Blended
Core Faculty	61.6%	64.7%	67.4%
Split	24.7%	16.4%	16.0%
Adjunct Faculty	13.0%	18.1%	14.8%

Fewer than 50 percent (45%) of private, for-profit institutions report that core faculty are teaching blended courses, which is comparable to the percentage saying core faculty teach online courses (48%) and higher than the percentage saying core faculty are teaching their face-to-face courses (38%).

Somewhat surprising is that the largest schools (15000+ students) report the highest percent of core faculty teaching blended courses (78%) and the smallest schools (under 500) report the smallest percent (56%). By Carnegie class, differences exist between doctoral/research institutions, where 80 percent report that their blended courses are taught by core faculty, and all the other classifications, where between 60 percent and 70 percent report their courses are taught by core faculty. With the exception of specialized

FIGURE 6: PERCENTAGE OF INSTITUTIONS REPORTING THEIR COURSES ARE TAUGHT BY CORE FACULTY



institutions, the percentage of institutions reporting that blended courses are taught by core faculty is slightly larger than the percent reporting that core faculty teach their online courses. Perhaps this is because online courses can be taught by faculty not on the physical campus but blended courses require at least part-time residence on-campus.

Do Blended Courses Hold More Promise than Fully Online?

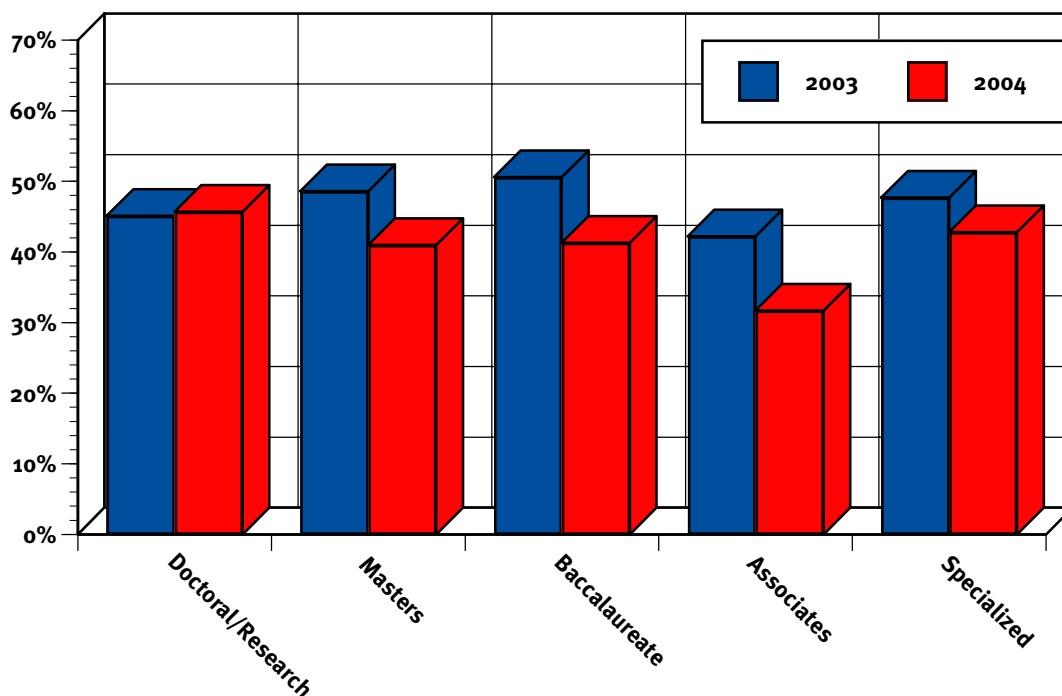
The academic leaders are neutral on the promise of blended vs. online courses.

Academic leaders were asked to rate their degree of agreement with the statement "in my judgment, blended courses (those that combine online with classroom) hold more promise than fully online courses" on a seven point scale. The Likert scale ranged from "1" for "strongly disagree", "4" for "neutral", to "7" for "strongly agree." There was no strong level of agreement or disagreement with this statement among the survey respondents; over half (55%) were neutral in 2004, up from 47 percent in 2003. This change mirrors the increasing rate of offerings of online courses and the relatively unchanged percentage of blended courses. Only the small number of schools which offer blended but no online courses were more likely to agree with this statement (69% in 2004), while schools offering online but no blended courses were the least likely to agree (22% in 2004).

While there were some differences noted by type of institution, the overall pattern is similar for public, private nonprofit, and private for-profit institutions with a majority of all types of schools rating blended and online courses equally. There was slightly greater and stronger agreement among the smaller, private, nonprofit institutions.

When examined by Carnegie class, size of school, and type of offering, it is the smaller, private, baccalaureate institutions that agree most strongly with this statement but the majority of these schools are still neutral. Within Carnegie class, all types of institutions show a decrease in the percent agreeing with this statement between 2003 and 2004 with the exception of a 0.6 percent increase among doctoral institutions.

FIGURE 7: DO BLENDED COURSES HOLD MORE PROMISE THAN FULLY ONLINE - PERCENT AGREEING 2003 AND 2004



THE CONSUMER PERSPECTIVE

The foregoing analysis concerns the extent and promise of blended education in the United States, from the point of view of U.S. higher education institutions. To add a consumer perspective, the Sloan Consortium teamed with Eduventures, LLC, a research and consulting firm specializing in education. Eduventures runs an “Online Higher Education” collaborative, a membership program for schools wishing to grow their online enrollments and operate more effectively online.

In June 2006, Eduventures conducted a national survey of 2,033 U.S. adults who identified themselves as interested in pursuing postsecondary education in the next three years. The survey was designed to improve understanding of consumer experience and interest in different delivery modes, such as online, campus-based, and blended forms of education delivery. Analysis of the survey was published by Eduventures in the report *Expanding Demand for Online Higher Education* (August, 2006).

Consumers were asked to report their experience of totally and partly online delivery, both in higher education and elsewhere. It is difficult to neatly separate different consumer experiences. The question posed to consumers distinguished between online and blended, and between courses and programs. Consumers were encouraged to use their judgment to allocate experience against the listed categories. This approach avoided cumbersome definitions that would be relatively meaningless to many respondents, but raised the possibility of inconsistent allocation of experience. For the purpose of this analysis, it is assumed that every consumer with online program experience also, by definition, has online course experience. In light of the ambiguities of blended delivery, it is assumed that half of consumers with blended program experience also have formal blended course experience.

EXPERIENCE OF ONLINE DELIVERY - TOTALLY ONLINE V. BLENDED

No online education experience (whether totally online or blended)	48.5%
Totally online course	29.1%
One or more courses that combined online classes and face-to-face activities (blended courses)	24.9%
Degree/certificate/diploma that combined online classes and face-to-face activities (blended program)	16.6%
Totally online degree/certificate/diploma (online program)	10.6%

These results suggest that a small majority of consumers (51.5%) interested in postsecondary education have experienced at least one online or blended course, whether in higher education or the workplace. Experience of totally online courses was about as common as experience of blended courses (29.1% and 24.9% respectively). Experience of blended programs was more common than experience of totally online programs (16.6% and 10.6% respectively). Not surprisingly, online/blended course experience is much more prevalent among consumers relative to online/blended program experience.

Of those consumers who reported having some kind of online or blended experience, forty-six percent reported having only one kind of experience. That is, among consumers with experience of totally online program, totally online course, blended program or blended course, 46% reported only one kind of experience. Among consumers with experience of more than one type of delivery, what were some of the combinations?

Of consumers reporting totally online program experience, only 23% also reported blended program experience, but 31% also reported blended course experience. Of consumers reporting blended program experience, 15% also reported online program experience, and 28% also reported online course experience. The survey did not ask about order of experience, e.g., whether course experience preceded program experience, or blended preceded online experience.

It is important to note that, compared to the Sloan-C classification, the Eduventures' survey question about consumer experience employed less precise definitions of blended delivery. When asking consumers about their experience, the Eduventures' survey distinguished "online" and "blended", but not the equivalent of the Sloan-C "web-facilitated" delivery. While it was not appropriate to ask consumers to classify experience of blended delivery in terms of quantitative proportion of content delivered online, it is likely that the consumer blended experience reported above includes experience that would fall under the "web-facilitated" category. This means that if the Sloan-C definition of blended is adhered to, consumer experience at course, and perhaps also program level, is somewhat lower than reported above. Subsequent Eduventures' survey questions on consumer preference and likelihood did distinguish blended and web-facilitated delivery.

Consumer Preferences

Respondents were asked to indicate their first preference by delivery mode. The following table concerns only consumers most interested in programs (i.e., degrees or for-credit certificates) rather than individual courses or non-credit study.

FIRST PREFERENCE BY DELIVERY MODE

A course/program that is primarily on-campus (web-facilitated)	24%
A totally on-campus course/program	22%
Totally online course/program	20%
Primarily online course/program (blended)	19%
A course/program that is equally balanced between online and on-campus (blended)	14%
A course/program by another form of distance learning (e.g. audio, video, CD-ROM)	2%

Consumer preference was evenly distributed across four of the six delivery modes. Seventy-six percent of consumers interested in postsecondary education stated a preference for a delivery mode with at least some online element, and eighty-one percent stated a preference for a delivery mode with at least some face-to-face element.

While only 10.6% of consumers reported prior experience of a totally online program (and only 6.1% reported such experience within postsecondary education), 19% expressed a preference for wholly online programs. In terms of blended delivery, the experience and preference figures were also some distance apart. While 16.6% of consumers reported blended program experience (with an estimated two-thirds of this experience in a postsecondary setting), 32% expressed a preference for either primarily online or online/on-campus balanced programs. Indeed, as noted above, adherence to the Sloan-C definition of blended would further widen the gap between experience and preference.

So for both online and blended delivery, consumer preference appears to significantly outpace prior consumer experience, and estimates of current market size. While there is

no estimate of the number of students in blended postsecondary programs, based on separate data and analysis, Eduventures estimates that only 7% of postsecondary students in the United States were in totally online programs at the end of 2005. Based on Eduventures' consumer data, and the Sloan-C institutional data above, it is unlikely that the proportion of postsecondary students in the United States in blended programs is much higher than 7 percent. Stated consumer preference for online/blended delivery is far in excess of this total. This is a positive finding, not least for universities and colleges that have invested in online and/or blended delivery.

“Likelihood” and Delivery Mode

Respondents were asked about the likelihood of undertaking a postsecondary program in the next three years by different delivery modes. (As above, this analysis concerns only consumers interested in programs of study, not single course or non-credit). This was an attempt to distinguish preference and “real world” choices. For many consumers, online and blended delivery may appeal for convenience and flexibility reasons, but may not, in an ideal situation, be perceived as first choices. Given other circumstances, to what extent would consumer first preference by delivery mode give way to other options?

INTEREST IN POSTSECONDARY EDUCATION – BY DELIVERY MODE LIKELIHOOD AND PREFERENCE

	“Likely” or “Very Likely”	Unsure	“Unlikely” or “Very Unlikely”	Preference
Totally on-campus course/program	55%	21%	24%	22%
Course/program that is primarily on-campus	50%	28%	22%	24%
Course/program that is primarily online (blended)	42%	29%	29%	19%
Totally online course/program	40%	26%	34%	20%
Equal balance between online and on-campus (blended)	39%	34%	27%	14%
Another form of distance learning	25%	33%	43%	2%

The results reveal significant disparities between likelihood of taking a particular delivery mode, and first preference. For example, while only 20% of consumers cited totally online delivery as first preference, 40% said it was likely or very likely that they would undertake a course/program in the next three years totally online. Similarly, while only 19% and 14% respectively stated a first preference for the two forms of blended delivery (“primary online” and “equal balance between online and on-campus”), 42% and 39% respectively reported that it was at least “likely” that they would pursue a form of blended course/program. One can trace a slight weakening of likelihood as the online element increases in significance. This suggests that alongside a growing acceptance of online modalities, there is a lingering comfort with campus-based delivery.

Rather than indicating an endorsement of a particular delivery mode, this data more likely reflects consumers' uncertainty about the inherent value of particular modes, and (more importantly) an openness to consider a variety of modes. This conclusion is consistent

with the relatively low reported levels of consumer experience of totally online and blended education at the program level.

Openness to different delivery modes is broadly comparable across the on-campus, blended and online categories, at around 70% (including “Unsure”). Indeed, many respondents expressed strong “likelihood” interest in a number of delivery modes. Thirty-three percent posted a total score of 15 or less out of a possible 30 (with “1” as “Very Likely” and “5” as “Very Unlikely”), suggesting fundamental openness to different delivery modes. The data suggests a potentially large market for online and blended provision, but with the caveat that many consumers are keeping their options open across the delivery mode spectrum.

Arguably, this suggests that the online/on-campus distinction is increasingly unimportant to the prospective student. “unimportant” does not mean “lacking in value,” but rather that as familiarity with online/blended modalities grows, reinforced by the pervasiveness of online technologies in many other aspects of daily life, “online” becomes normal infrastructure, and not a strong differentiator in and of itself. In this view, “online”, whether a program is wholly or partly online, is akin to paper, books, or electricity, an essential but taken-for-granted element of the postsecondary experience

The fact that a program is online reveals very little about the particulars of that program relative to any other. As forms of online postsecondary study become “normal,” the prospective student may begin to ask, “What does online delivery enable this particular institution to do, relative to other institutions?” Just as prospective students are interested in the quality of an institution’s library collection, or the services afforded by electricity (and not the basic facts that an institution has books or electricity), so “online” increasingly may become commoditized, and it will be what institutions “do” with online delivery that will count.

This line of argument fits with the Eduventures report *Competing in Online Higher Education: positioning & differentiation strategies* (February 2006). In a context where hundreds of schools now operate online, a value proposition centered on convenience, when all online providers are more or less equally convenient, is not sufficient. Simply “being online” or “being blended” is no longer a differentiator.

In particular, “blended delivery” spans a wide range of possible online/on-campus combinations. With 32% consumer preference, “blended delivery” may potentially be most popular with consumers, but is arguably least coherent as a category. In addition, as forms of online technology become ever more pervasive on-campus, the campus-based, web-facilitated and blended categories will become increasingly blurred, even within individual courses.

A prospective student’s final choice of delivery mode may be secondary to other considerations, such as school or program reputation, pedagogical model, school location, credit transfer arrangements or price. For many prospective students, if other value triggers are in place, a range of delivery modes may be acceptable. For other prospective students, circumstances, experience or preference may dictate only one delivery mode. “Likelihood” data does not show more significant gains for online/blended delivery, relative to campus-dominated modes. While, for certain demographics, work and family responsibilities may make online/blended more “likely” than campus-dominated delivery, the key message of the consumer data is that for most prospective students, delivery mode is only one factor in program selection.

This raises the question of whether consumer data suggests that schools should offer one or a range of delivery modes. Offering one delivery mode may be more cost-effective for the institution, but potentially limits consumer appeal, and vice versa. Equally, consumer openness/uncertainty may present an opportunity for schools to drive consumers to a particular delivery mode, based on persuasive messaging. Just as consumers are ultimately able to read little into blanket terms such as “totally online” and “blended”, so schools have significant scope for decision-making around what online/blended delivery might “look like” in particular circumstances (e.g. faculty, pedagogy).

The situation is dynamic. Consumer experience will grow and become more sophisticated, the balance between consumers who regard delivery mode as a primary versus secondary consideration may shift over time, and school development and positioning of online/blended provision will shape consumer perceptions. Based on consumer data, what appears certain is that the market for online/blended higher education has a lot of room for growth. Much less certain is student distribution by delivery mode, and delivery mode categorization, in five or ten year’s time.

This is merely an overview of the consumer dataset collected by Eduventures. Members of the Eduventures’ “Online Higher Education” collaborative have exclusive access to the full report, plus the opportunity to commission custom analysis from the dataset to better understand particular consumer segments and demand for particular credentials and disciplines.

SUMMARY OF THE FINDINGS

- Most institutions report offering a greater percentage of online courses than blended courses. Only baccalaureate institutions, where online education has the smallest penetration rate, offer a slightly greater or equal percentage of blended courses than online ones.
- There is a slightly larger percent of blended program offerings than online programs across all disciplines.
- Offerings of blended courses decreased slightly between 2003 and 2005 while online course offerings grew.
- Overall, only 38 percent of respondents agreed with the statement “blended courses hold more promise than online courses” in 2004. This is a decrease from 46% of respondents agreeing with the statement in 2003.
- Only in schools offering blended but not online courses were a majority likely to strongly agree that blended holds more promise and this percentage dropped from 2003 to 2004 (72% in 2003 to 68% in 2004).
- Schools reported offering an average of 10.6 percent of their course sections online in 2005, up from 6.5 percent in 2003, while the respective percentages for blended offerings show a steady decline: 6.8% in 2003, 6.6% in 2004, and 5.6% in 2005.
- The number of institutions that offer blended courses without offering any online courses is very small at private, non-profit institutions (17.1%), public institutions (3.8%), and private, for-profit institutions (6.6%).
- Consumer preference for and openness to online and blended delivery far exceeds consumer experience of these delivery modes. This suggests that the market for online/blended delivery has a lot of room for growth.
- Consumer data is less an endorsement of a particular mode of delivery and more as reflecting uncertainty as to the inherent value of particular modes, and openness to consider a variety of modes.
- As consumers’ experiences grow and become more sophisticated, the balance between consumers who regard delivery mode as a primary versus secondary consideration may shift over time, and school development and positioning of online/blended provision will shape consumer perceptions.

SURVEY SUPPORT AND METHODOLOGY

The sample for the analysis is composed of all active, degree-granting institutions of higher education in the United States that are open to the public.

Beginning with the 2006 survey, 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. Babson Survey Research Group and the College Board coordinate survey instruments and sample outreach; each respondent institution receives identically-worded questions, and those that have responded to one survey are not asked to respond to the same questions on the other.

All sample schools were sent an invitation email and multiple reminders, inviting their participation and assuring them that no individual responses would be released. All survey respondents were promised that they would be notified when the report was released and would receive a free copy.

The sample 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%). These responses were merged with the data from the previous survey years (994 responses in 2003, 1,170 in 2004, and 1,025 in 2005) for examination of changes over time.

Institutional descriptive data come from the College Board Annual Survey of Colleges and from the Nation Center for Educational Statistics' IPEDS database (<http://nces.ed.gov/ipeds/>). After the data were compiled and linked to the College Board Annual College Survey and to the IPEDS database, the 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/>). 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.

Eduventures' Expanding Demand for Online Higher Education report is based on survey of 2,033 consumers nationally aged 16 and over. The key qualifier for the sample was interest in postsecondary education in the next three years. Given that there is no "national" data on this variable, it is not possible to formally determine whether the present sample is representative of the U.S. adult population as a whole. In addition, while the sample spanned a broad range of demographic characteristics, it was not practical to precisely control the sample by key demographics such as age, gender, and ethnicity. Of course, all manner of variables that are difficult to control for in this type of study (e.g., prior education, income, marital status, as well as cross-referencing age, gender, and ethnicity) may influence the representativeness of a sample.

While it is not possible to demonstrate that the sample is representative of the U.S. adult population in the strict sense, the sample does constitute a broad, national dataset that affords significant insights into consumer experience and views on online and blended higher education.

APPENDIX

Blended and Online Course Penetration Rates

ONLINE AND BLENDED COURSE PENETRATION RATES – FALL 2004

	Online	Blended
Undergraduate Level	62.5%	51.9%
Graduate Level	65.2%	55.0%
Continuing Education	56.2%	29.1%

ONLINE AND BLENDED COURSE PENETRATION RATES - FALL 2004

	Doctoral/Research		Master's		Baccalaureate		Associate's		Specialized	
	Online	Blended	Online	Blended	Online	Blended	Online	Blended	Online	Blended
Undergraduate Level	64.3%	56.6%	67.6%	58.4%	33.9%	34.8%	77.5%	61.9%	31.7%	34.9%
Graduate Level	78.9%	65.6%	65.8%	62.1%	32.2%	36.8%	100.0%	50.0%	58.2%	43.8%
Continuing Education	74.1%	41.5%	48.5%	36.4%	29.1%	27.3%	70.8%	28.0%	26.3%	11.5%

Blended and Online Program Penetration Rates

FACE-TO-FACE, ONLINE, AND BLENDED PROGRAM OFFERINGS - FALL 2004

	Face-to-face	Online	Blended
Certificate	62.3%	22.0%	16.7%
Associate	58.7%	23.3%	18.0%
Bachelors	54.4%	16.3%	13.8%
Master's	38.9%	17.0%	14.8%
Doctoral	15.8%	1.9%	2.6%
Professional	13.7%	2.1%	1.7%

ONLINE AND BLENDED PROGRAM PENETRATION RATES – FALL 2004

	Online	Blended
Certificate	35.3%	26.9%
Associate	39.8%	30.7%
Bachelors	29.9%	25.3%
Master's	43.6%	38.2%
Doctoral	12.4%	16.2%
Professional	15.3%	12.3%

ONLINE AND BLENDED PROGRAM PENETRATION RATES - FALL 2004

	Under 1500		1500-2999		3000-7499		7500-14999		15000+	
	Online	Blended	Online	Blended	Online	Blended	Online	Blended	Online	Blended
Certificate	19.7%	12.0%	37.8%	42.2%	49.9%	38.3%	52.1%	31.2%	68.4%	41.8%
Associate	31.7%	20.2%	44.3%	43.8%	55.6%	47.8%	35.8%	24.8%	57.1%	25.4%
Bachelors	26.9%	20.3%	25.8%	23.9%	36.4%	31.7%	38.7%	39.3%	39.1%	32.0%
Master's	31.1%	30.6%	43.4%	39.0%	45.1%	40.4%	59.9%	44.4%	69.0%	52.6%
Doctoral	5.6%	12.2%	17.1%	34.1%	6.7%	8.9%	14.1%	14.1%	17.4%	17.4%
Professional	9.5%	8.4%	2.4%	9.8%	10.4%	12.2%	21.4%	20.1%	34.5%	16.8%

ONLINE AND BLENDED PROGRAM PENETRATION RATES - FALL 2004

	Doctoral/Research		Master's		Baccalaureate		Associate's		Specialized	
	Online	Blended	Online	Blended	Online	Blended	Online	Blended	Online	Blended
Certificate	60.3%	35.2%	40.8%	29.8%	17.2%	20.0%	32.2%	33.8%	22.8%	5.0%
Associate	43.9%	36.7%	23.3%	22.0%	25.7%	20.4%	42.8%	39.5%	23.0%	14.5%
Bachelors	38.4%	30.7%	34.4%	34.8%	19.0%	21.2%	23.1%	13.4%	22.8%	20.2%
Master's	65.7%	42.3%	45.3%	44.1%	25.8%	29.9%	50.0%	0.0%	35.0%	29.9%
Doctoral	16.4%	18.4%	13.3%	16.3%	0.0%	0.0%	0.0%	0.0%	9.3%	17.4%
Professional	24.7%	14.8%	11.9%	19.3%	11.1%	11.1%	19.0%	19.0%	8.4%	8.4%

FACE-TO-FACE, ONLINE, AND BLENDED PROGRAM OFFERINGS BY DISCIPLINE - FALL 2003

	Face-to-face	Online	Blended
Business	74.2%	31.7%	35.6%
Computer and Information Sciences	73.3%	25.7%	30.4%
Education	64.9%	16.2%	23.7%
Health Professions and Related Sciences	65.4%	20.5%	28.4%
Liberal Arts and Sciences, General Studies, Humanities	76.4%	30.7%	36.5%
Psychology	72.8%	17.2%	19.7%
Social Sciences and History	72.2%	20.5%	22.8%
All Other Programs	63.1%	22.9%	25.3%

ONLINE AND BLENDED PROGRAM PENETRATION RATES - FALL 2003

	Public		Private, nonprofit		Private, for-profit	
	Online	Blended	Online	Blended	Online	Blended
Business	51.3%	49.8%	27.3%	43.6%	80.5%	84.1%
Computer and Information Sciences	43.0%	47.9%	21.6%	31.1%	51.9%	44.4%
Education	30.4%	41.6%	17.6%	29.2%	50.8%	91.7%
Health Professions and Related Sciences	35.5%	48.1%	23.4%	35.1%	32.3%	36.0%
Liberal Arts and Sciences, General Studies, Humanities	54.6%	59.5%	20.2%	32.5%	55.2%	27.6%
Psychology	34.4%	34.7%	9.3%	16.8%	26.5%	34.8%
Social Sciences and History	40.7%	40.0%	11.1%	19.6%	31.6%	41.5%

ONLINE AND BLENDED PROGRAM PENETRATION RATES - FALL 2003

	Under 1500		1500–2999		3000–7499		7500–14999		15000+	
	Online	Blended	Online	Blended	Online	Blended	Online	Blended	Online	Blended
Business	21.4%	36.0%	45.5%	44.7%	50.8%	49.2%	52.5%	59.7%	45.3%	57.2%
Computer and Information Sciences	20.4%	33.6%	26.7%	35.4%	42.4%	43.3%	51.8%	57.0%	41.7%	45.7%
Education	14.2%	22.3%	16.5%	28.6%	27.7%	39.3%	44.5%	49.4%	34.7%	56.9%
Health Professions and Related Sciences	20.6%	28.6%	22.9%	33.4%	31.6%	48.8%	45.3%	59.5%	50.2%	59.3%
Liberal Arts and Sciences, General Studies, Humanities	26.3%	28.9%	38.0%	47.2%	46.3%	54.8%	55.2%	61.0%	43.9%	58.4%
Psychology	11.0%	13.2%	20.1%	23.4%	30.4%	31.1%	37.2%	40.5%	24.9%	37.8%
Social Sciences and History	14.2%	17.9%	28.6%	26.1%	33.2%	33.3%	42.8%	50.3%	27.0%	42.9%

ONLINE AND BLENDED PROGRAM PENETRATION RATES - FALL 2003

	Doctoral/Research		Master's		Baccalaureate		Associate's		Specialized	
	Online	Blended	Online	Blended	Online	Blended	Online	Blended	Online	Blended
Business	36.9%	63.5%	37.9%	56.0%	19.2%	38.1%	56.3%	42.7%	54.3%	51.1%
Computer and Information Sciences	30.5%	45.1%	22.9%	37.5%	15.2%	32.3%	52.1%	49.2%	44.6%	29.3%
Education	39.0%	73.2%	32.4%	52.1%	9.6%	20.4%	24.9%	23.3%	27.9%	40.7%
Health Professions and Related Sciences	59.0%	63.8%	32.2%	49.6%	16.0%	28.2%	28.2%	41.3%	43.4%	46.1%
Liberal Arts and Sciences, General Studies, Humanities	36.7%	53.2%	28.6%	54.4%	11.8%	27.0%	63.7%	56.0%	34.7%	39.6%
Psychology	12.2%	30.8%	13.4%	32.6%	7.3%	12.1%	44.8%	32.7%	21.1%	21.9%
Social Sciences and History	16.3%	35.4%	17.0%	34.8%	10.0%	16.5%	51.3%	39.7%	26.5%	18.3%

Percentage of Course Sections Taught Online

PERCENT OF COURSE SECTIONS TAUGHT ONLINE – FALL 2003, 2004, AND 2005

	2003	2004	2005
Mean	6.48%	8.19%	10.86%
Median	2.00%	4.00%	5.00%

PERCENT OF COURSE SECTIONS TAUGHT ONLINE – FALL 2003, 2004, AND 2005

	Public			Private not-for-profit			Private for-profit		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mean	7.13%	9.84%	12.15%	5.28%	6.17%	6.34%	8.14%	9.33%	16.19%
Median	5.00%	5.00%	10.00%	0.00%	0.00%	1.00%	0.00%	5.00%	2.00%

PERCENT OF COURSE SECTIONS TAUGHT ONLINE – FALL 2003, 2004, AND 2005

	Under 1500			1500–2999			3000–7499		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mean	6.31%	7.36%	9.07%	6.08%	8.80%	10.10%	8.21%	9.99%	14.74%
Median	0.00%	0.00%	1.00%	2.00%	5.00%	5.00%	5.00%	6.00%	10.00%

	7500–14999			15000+		
	2003	2004	2005	2003	2004	2005
Mean	7.00%	10.35%	13.73%	3.47%	4.27%	10.35%
Median	3.00%	5.00%	10.00%	2.00%	4.00%	9.00%

PERCENT OF COURSE SECTIONS TAUGHT ONLINE – FALL 2003, 2004, AND 2005

	Doctoral/Research			Master's			Baccalaureate		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mean	3.58%	5.06%	7.22%	5.91%	7.51%	10.12%	3.73%	6.85%	6.53%
Median	2.00%	3.00%	5.00%	1.00%	3.00%	5.00%	0.00%	0.00%	1.00%

	Associate's			Specialized		
	2003	2004	2005	2003	2004	2005
Mean	7.93%	9.40%	14.86%	5.45%	7.59%	8.28%
Median	5.00%	5.00%	10.00%	0.00%	0.00%	1.00%

Percentage of Course Sections Taught as Blended

PERCENT OF COURSE SECTIONS TAUGHT AS BLENDED – FALL 2003, 2004, AND 2005

	2003	2004	2005
Mean	6.81%	6.57%	5.56%
Median	1.00%	1.00%	1.00%

PERCENT OF COURSE SECTIONS TAUGHT AS BLENDED – FALL 2003, 2004, AND 2005

	Public			Private not-for-profit			Private for-profit		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mean	7.52%	7.96%	8.60%	6.91%	5.94%	3.95%	3.52%	4.95%	2.99%
Median	2.00%	2.00%	5.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.00%

PERCENT OF COURSE SECTIONS TAUGHT AS BLENDED – FALL 2003, 2004, AND 2005

	Under 1500			1500–2999			3000–7499		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mean	5.82%	5.13%	3.01%	6.49%	7.60%	7.39%	7.80%	8.47%	7.54%
Median	0.00%	0.00%	0.00%	2.00%	2.00%	2.00%	2.00%	2.00%	3.00%

	7500–14999			15000+		
	2003	2004	2005	2003	2004	2005
Mean	8.00%	9.85%	7.98%	11.39%	7.42%	8.43%
Median	2.00%	2.00%	5.00%	2.00%	2.48%	3.00%

PERCENT OF COURSE SECTIONS TAUGHT AS BLENDED – FALL 2003, 2004, AND 2005

	Doctoral/Research			Master's			Baccalaureate		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mean	14.26%	7.16%	7.92%	9.63%	10.51%	9.83%	4.90%	5.09%	4.01%
Median	5.00%	2.00%	5.00%	3.00%	5.00%	3.00%	1.00%	0.00%	0.00%

	Associate's			Specialized		
	2003	2004	2005	2003	2004	2005
Mean	4.56%	5.20%	5.65%	6.62%	7.42%	4.45%
Median	1.00%	1.00%	1.00%	0.00%	0.00%	0.00%

Who Teaches Face-to-face, Online, and Blended Courses

WHO TEACHES FACE-TO-FACE, ONLINE, AND BLENDED COURSES - FALL 2004

	Public			Private not-for-profit			Private for-profit		
	Face-to-face	Online	Blended	Face-to-face	Online	Blended	Face-to-face	Online	Blended
Core Faculty	60.7%	74.1%	74.4%	70.4%	55.2%	60.7%	39.4%	47.8%	44.6%
Split	30.7%	17.1%	14.8%	18.8%	17.7%	19.4%	25.5%	10.4%	12.7%
Adjunct Faculty	8.3%	8.7%	9.4%	9.8%	26.7%	18.3%	34.5%	37.4%	37.7%

WHO TEACHES FACE-TO-FACE, ONLINE, AND BLENDED COURSES - FALL 2004

	Under 1500			1500-2999			3000-7499		
	Face-to-face	Online	Blended	Face-to-face	Online	Blended	Face-to-face	Online	Blended
Core	58.8%	56.3%	56.1%	67.3%	67.2%	74.9%	59.3%	70.6%	69.9%
Split	22.6%	16.8%	17.2%	25.6%	14.2%	14.7%	28.5%	17.8%	19.1%
Adjunct	17.8%	25.4%	24.5%	6.6%	17.9%	8.8%	11.7%	11.2%	10.2%

	7500-14999			15000+		
	Face-to-face	Online	Blended	Face-to-face	Online	Blended
Core	54.3%	68.5%	74.9%	84.8%	77.6%	78.4%
Split	35.7%	20.0%	14.6%	13.7%	13.7%	8.8%
Adjunct	8.2%	11.5%	7.5%	1.5%	8.7%	9.9%

WHO TEACHES FACE-TO-FACE, ONLINE, AND BLENDED COURSES - FALL 2004

	Doctoral/Research			Master's			Baccalaureate		
	Face-to-face	Online	Blended	Face-to-face	Online	Blended	Face-to-face	Online	Blended
Core	84.8%	71.2%	80.2%	68.8%	62.5%	70.3%	79.1%	60.6%	65.9%
Split	11.4%	12.3%	9.9%	22.5%	18.5%	17.6%	14.6%	3.8%	11.4%
Adjunct	3.8%	16.5%	6.3%	7.7%	18.1%	11.0%	5.6%	35.6%	22.7%

	Associate's			Specialized		
	Face-to-face	Online	Blended	Face-to-face	Online	Blended
Core	47.4%	67.6%	69.4%	65.2%	61.2%	61.1%
Split	39.1%	21.0%	17.5%	17.6%	10.0%	17.6%
Adjunct	13.2%	10.0%	11.0%	16.1%	28.9%	18.2%

Do Blended Courses Hold More Promise than Fully Online Courses?

BLENDING COURSES HOLD MORE PROMISE THAN FULLY ONLINE - FALL 2003 AND 2004

	2003	2004
Agree	45.9%	37.7%
Neutral	47.1%	55.2%
Disagree	7.0%	7.1%

BLENDING COURSES HOLD MORE PROMISE THAN FULLY ONLINE - FALL 2003 AND 2004

	Public		Private, nonprofit		Private, for-profit	
	2003	2004	2003	2004	2003	2004
Agree	42.6%	35.7%	49.2%	41.0%	46.6%	33.3%
Neutral	48.9%	57.0%	45.8%	52.6%	44.6%	57.5%
Disagree	8.4%	7.2%	5.0%	6.4%	8.8%	9.2%

BLENDING COURSES HOLD MORE PROMISE THAN FULLY ONLINE - FALL 2003 AND 2004

	Under 1500		1500-2999		3000-7499		7500-14999		15000+	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Agree	48.2%	37.9%	44.6%	36.8%	41.5%	37.0%	45.8%	36.0%	45.0%	39.7%
Neutral	46.9%	54.2%	46.5%	57.1%	48.8%	57.8%	48.3%	56.4%	43.6%	48.9%
Disagree	5.0%	7.9%	8.8%	6.1%	9.7%	5.2%	5.9%	7.6%	11.4%	11.4%

Blending In: *The Extent and Promise of Blended Education in the United States*, builds on a series of annual reports on the state of online education in U.S. Higher Education. This study, like the previous annual reports, is aimed at answering some of the fundamental questions about the nature and extent of education in the United States. Unlike the previous reports that focused exclusively on online learning, the current report examines blended (also called hybrid) instruction. The findings are based on three years of responses from a national sample of over 1,000 colleges and universities.

Questions examined in the report include:

- Have the course and program offerings in online education entered the mainstream?
- Are blended courses more prevalent than fully online courses?
- Do blended courses hold more promise than fully online courses?
- Are blended courses simply a stepping stone for institutions on the way to fully online courses?
- Do students prefer blended courses over either fully online or face-to-face courses?



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