



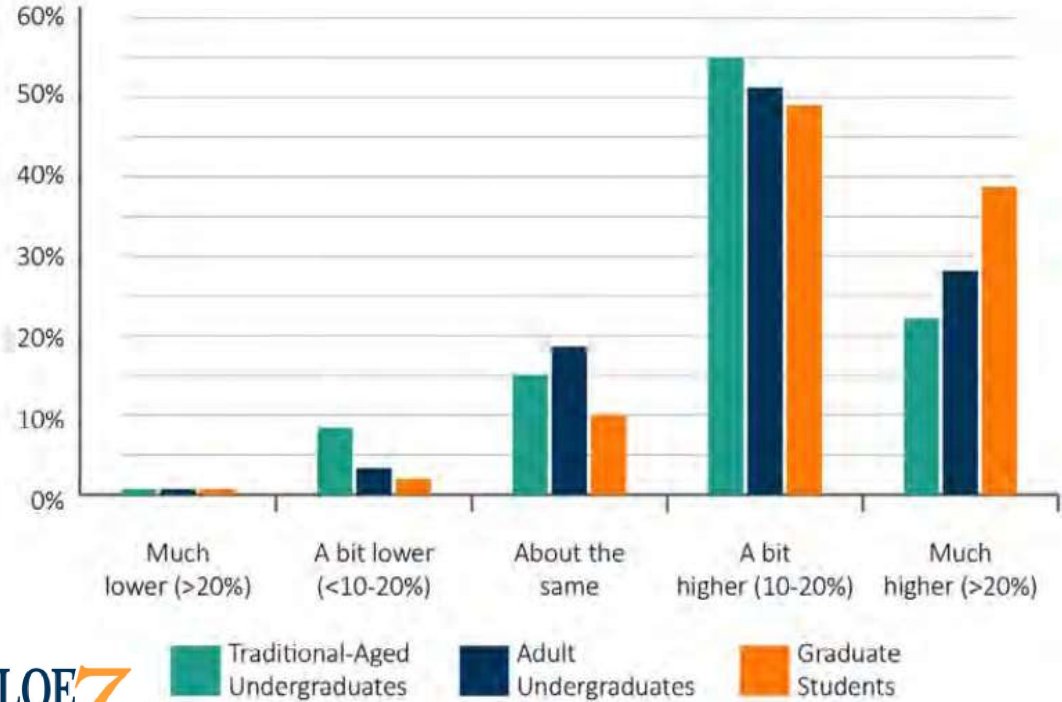
# Online Education in Montana

September 2022



# Nationally, Demand for Online is Expected to Grow

**Figure 2. COOs Anticipate Further Growth in Online Student Interest by 2025 vs. 2021**  
(Sample = 269 Traditional-Aged UG, 264 Adult UG, and 175 Graduate)

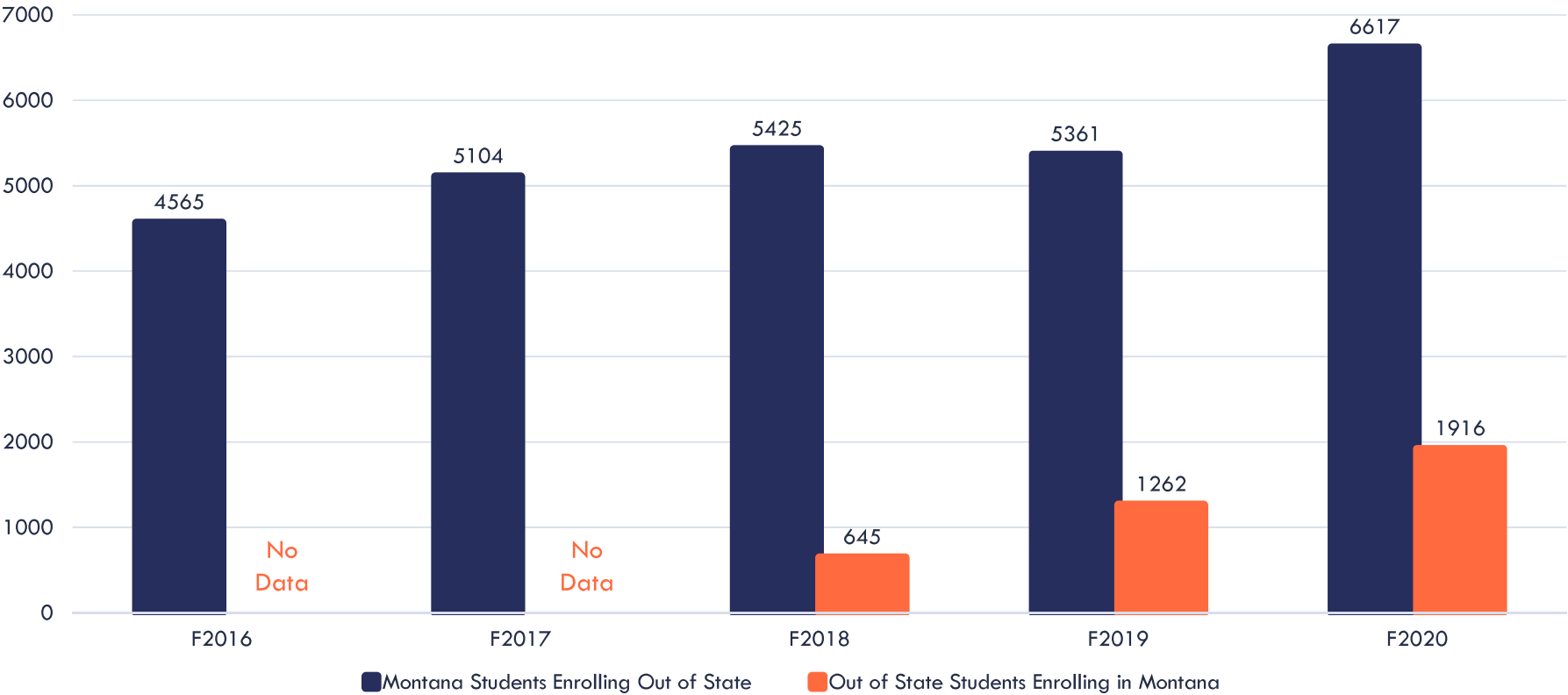


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# Distance Education Student Import/Export

<https://nc-sara.org/data-dashboards>



# Top 5 Out-of-state Institutions for Online MT Students

<https://nc-sara.org/data-dashboards>

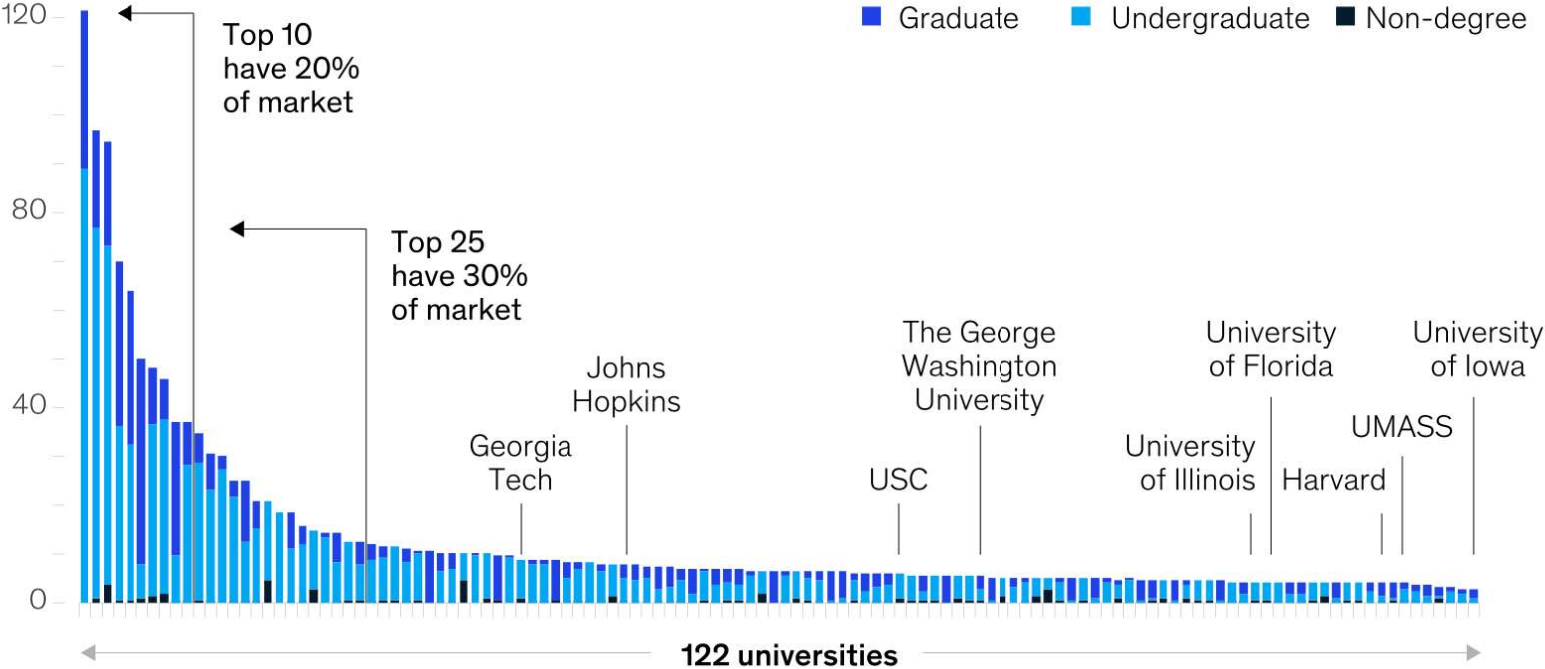


	F2016	F2017	F2018	F2019	F2020	5-year Change
<b>Western Governors</b>	479	559	686	750	860	<b>+80%</b>
<b>SNHU</b>	147	230	262	294	379	<b>+158%</b>
<b>Penn Foster</b>	171	158	137	136	284	<b>+66%</b>
<b>Grand Canyon University</b>	161	172	207	249	279	<b>+73%</b>
<b>University of Phoenix</b>	395	289	285	267	249	<b>-37%</b>



# Nationally, the Online Market is Consolidating

2018 online enrollment by institution,<sup>1</sup> thousands of students



<sup>1</sup>Filtered for 3,000+ online-only students, n = 122.  
Source: Integrated Postsecondary Education Data System; Kantar data



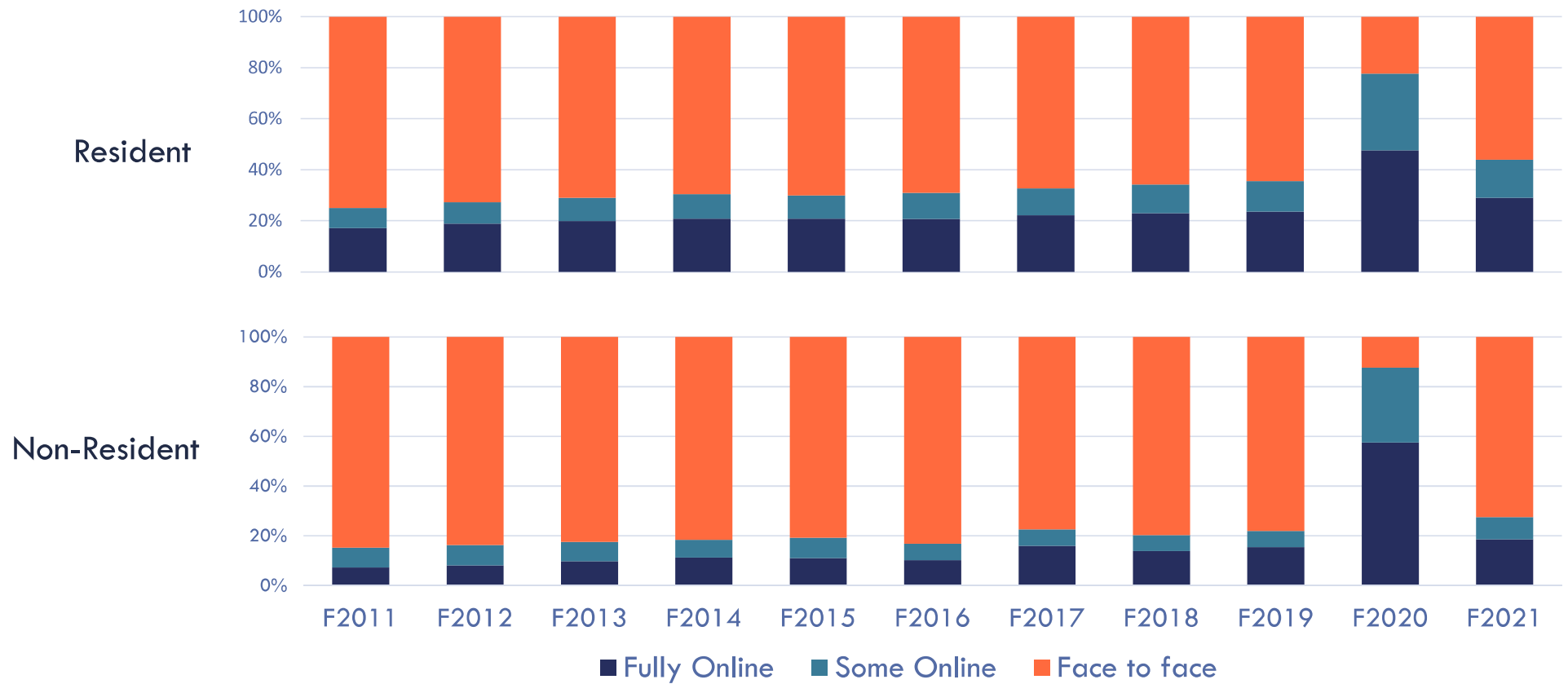
# The Changing Market for Online Education

- ❖ Online education has grown both nationally and in Montana
- ❖ That growth is increasingly concentrated in a few, large institutions
- ❖ These institutions specialize in serving students seeking flexibility
  - Adult undergraduates
  - Veterans
  - Graduate Students
- ❖ National leaders expect online education will continue to grow



# More MUS students are taking online or blended coursework

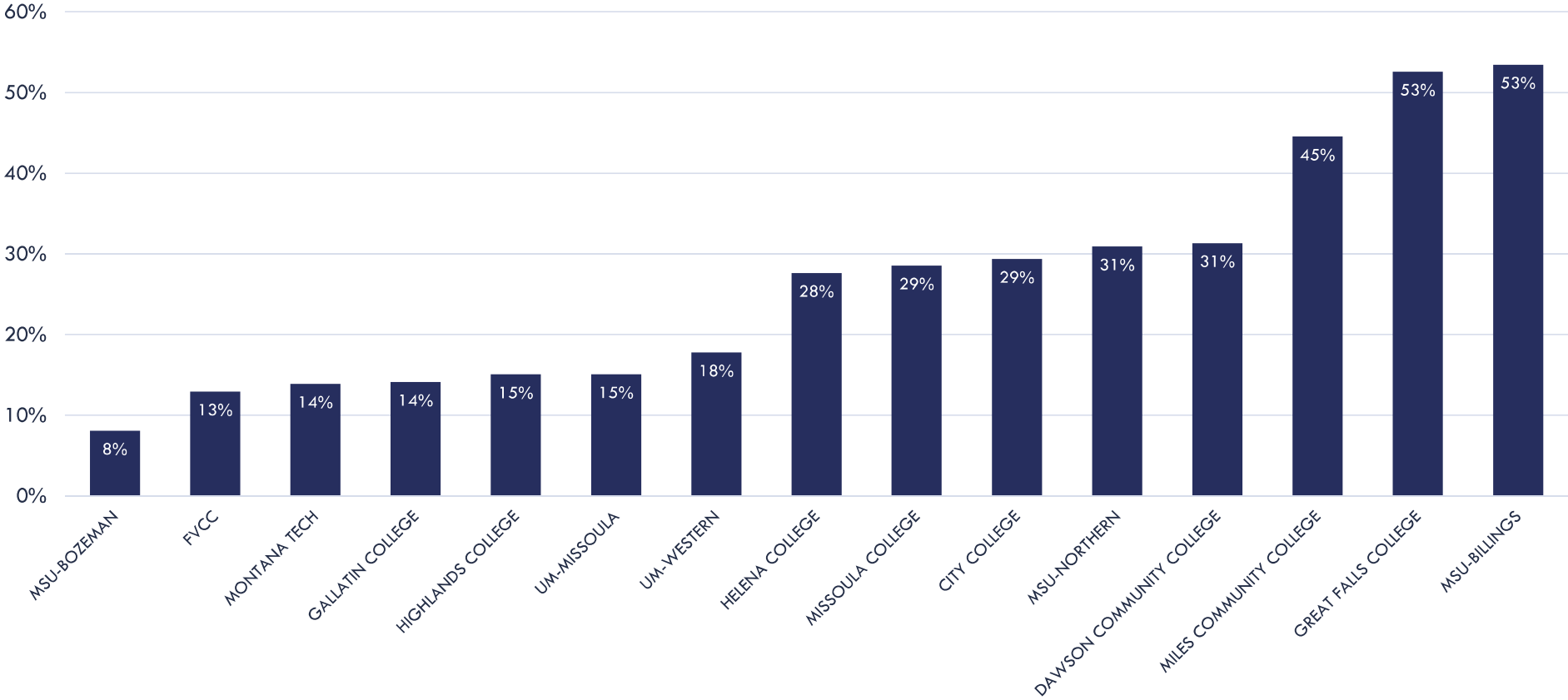
MUS students, all levels, by attendance modality





# More MUS students are taking online or blended coursework

Proportion of student credit hours delivered in an online or blended modality, F2021







# What is Montana's Online Niche?

## FLEXIBILITY

Providing more flexible pathways for transitory populations, including veterans.

Ex. Great Falls College  
online AA/AS

## LOW-RESIDENCY PROGRAMS

Online, but with short in-person intensives. Provides flexibility while preserving in-person cohort experience.

Ex. UM-Western education pathways

## UNIQUE GRADUATE OFFERINGS

Select graduate degree programs without a regional or national peer.

Ex. UM-Missoula's Masters of Social Work

## HUB & SPOKE PROGRAM COLLABORATIONS

Extending in-demand programs to new communities in collaboration with other MUS campuses.

Ex. OneMSU Workforce Consortium



# Montana's Online Strategy

## Invest in our Experts

Support partnerships and professional development among front-line online learning staff

## Ensure Quality

Develop tools / processes that ensure BOR policy standards on online learning quality are upheld



## Modern and Unified Tools

Unify the technology supporting online learning, so we can procure and support more and better tools at lower cost

## Technology for Collaboration

Scale pilot course and program sharing models to new campuses and new applications