

CHLOE 9

Strategy Shift: Institutions respond to sustained online demand



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THANK YOU TO OUR CHLOE ADVISORY PANEL

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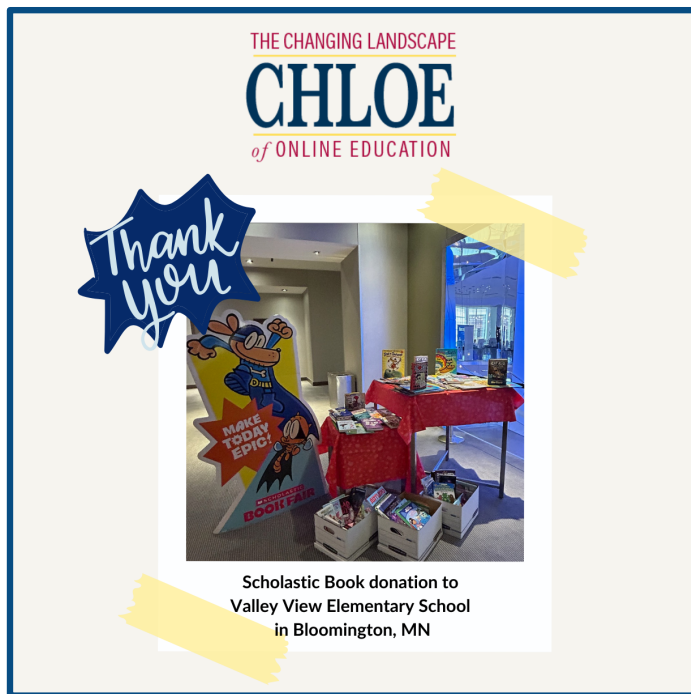
Jill Buban, EdAssist Solutions
Andrea Jones-Davis, CourseGateway at EDUCAUSE
Connie Johnson, Colorado Technical University
Chris LaBelle, University of Michigan – Ann Arbor
Arletha McSwain, Central State University (OH)
Tina Parscal, Colorado Community College System
Jeff Seaman, Bay View Analytics
Peter Shea, SUNY - Albany
Sasha Thackaberry, Pearson
Lori Williams, Excelsior University

CHLOE 9 - 11

Dylan Barth, Online Learning Consortium
Tom Cavanagh, University of Central Florida
Elizabeth Ciabocchi, Adelphi University
Cristi Ford, D2L
Angela Gunder, Online Learning Consortium
Connie Johnson, Colorado Technical University
Valerie Kelly, Kent State University
Tina Parscal, Colorado Community College System
Julie Porosky Hamlin, MarylandOnline
Karen Rege, Community College of Philadelphia
Jeff Seaman, Bay View Analytics
Morris Thomas, Howard University
Lori Williams, Excelsior University

THANK YOU, CHIEF ONLINE LEARNING OFFICERS

The CHLOE report would not be possible without you!



Additionally, we thank you for your generosity.

Last year, COLO respondents donated \$2,100 worth of Scholastic books to an in-need school district via Quality Matters' "QM Gives Back" program.

This year, your donation will be \$2,135!

PARTNERS



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AGENDA

CHLOE 9 Respondent Information

1. Online Strategies and Priorities
2. Online Revenue, Funding, and Pricing
3. AI: Attitudes, Uses, and Policies



RESPONDENT INFORMATION



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THE CHLOE 9 SAMPLE BY SECTOR & ONLINE ENROLLMENT SCALE

(324 complete and usable partial responses)

CHLOE 9 Sample vs. U.S. Higher Education (Fall 2022)

Sector	Public 2Y	Public 4Y	Private 4Y	For-Profit
Institutions	21%	19%	37%	20%
Total Enrollment*	24%	48%	22%	5%
Online Enrollment**	26%	48%	18%	8%
Fully Online Enrollment*	29%	36%	22%	13%
CHLOE 9 Sample	26%	39%	33%	2%
DIFFERENCE between CHLOE 9 Sample and Online Enrollment	Identical	-9 percentage points	+15 percentage points	-6 percentage points

CHLOE 8 vs. 9 Sample by Online Student Headcount Fall vs. 12-month Unduplicated Headcount

CHLOE 9 Sample	Large <7,500	Mid-Sized 1,000-7,500	Small <1,000
Schools by Number of Fully & Partially Online Students (Fall 2022)	83	173	68
% of CHLOE 9 Sample	26%	53%	21%
Schools by Number of Fully & Partially Online Students (12-Month 2021-2022)	129	153	42
% of CHLOE 9 Sample	40%	47%	13%

*Undergraduate and graduate students combined (Fall 2022). **Fully online students and those taking one or two online courses as part of an otherwise campus-based experience, undergraduate and graduate combined (Fall 2022). Source: IPEDS.

"Small" includes a few schools reporting zero online enrollment. Source: IPEDS.

ONLINE STRATEGIES and PRIORITIES



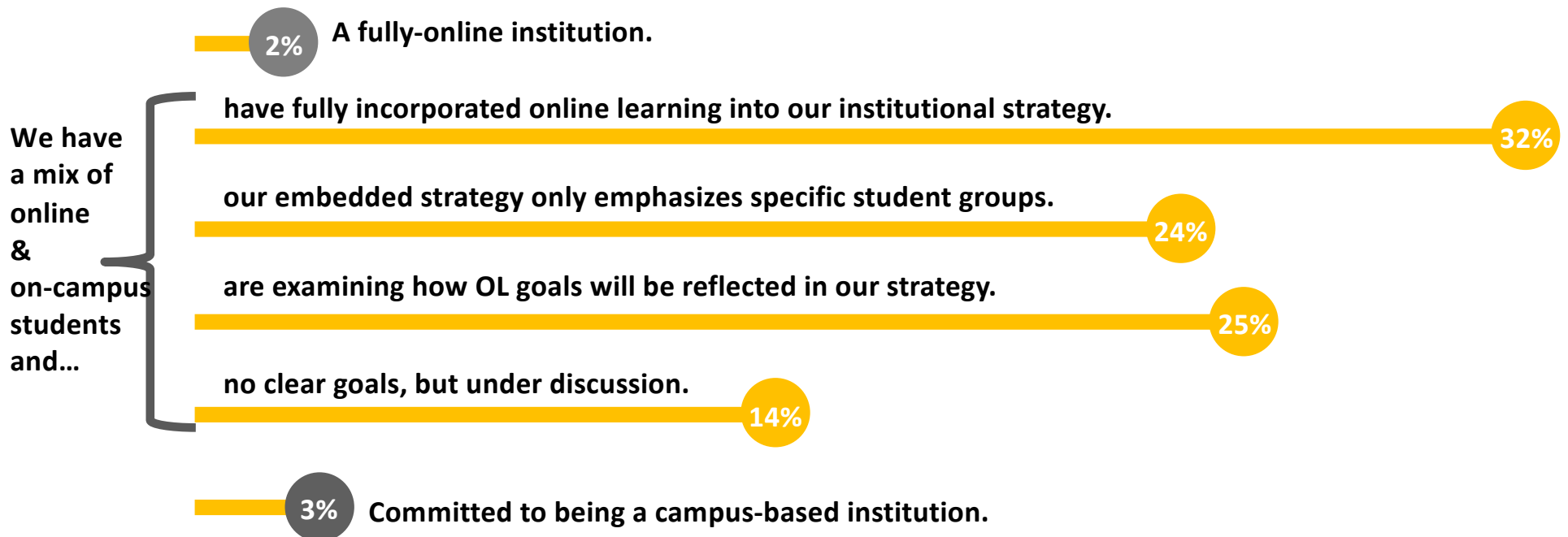
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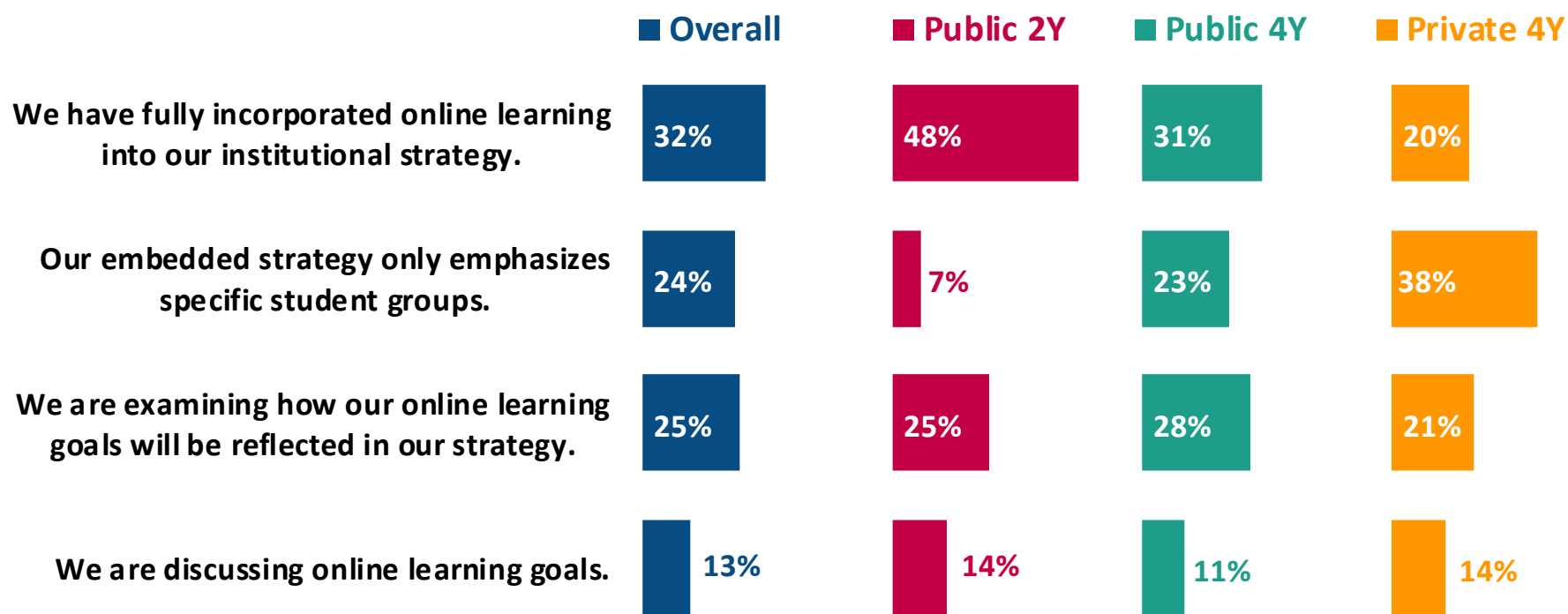
Primary Institutional Strategic Approach to Online Learning

(Sample = 324)

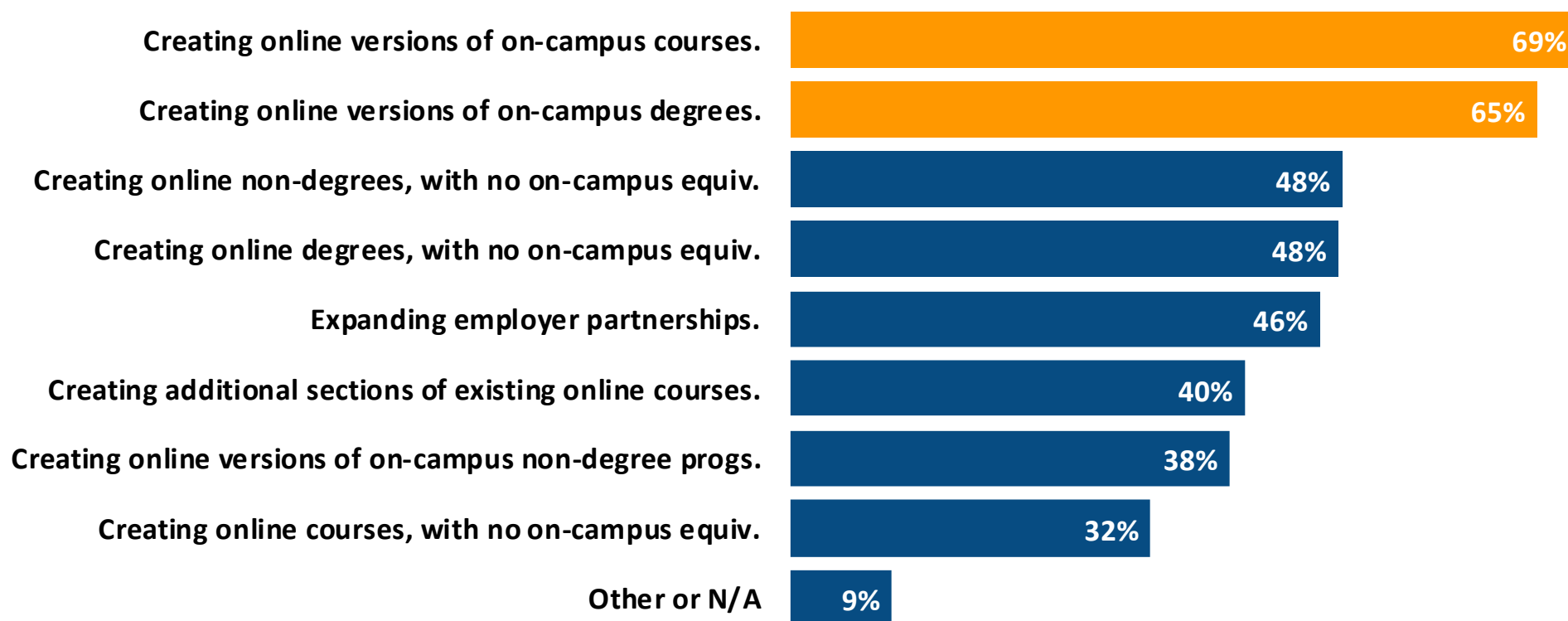


Institutional Strategic Approach Differs by Sector

(Sample = 318; Public 2Y = 83, Public 4Y = 127, Private 4Y = 108)

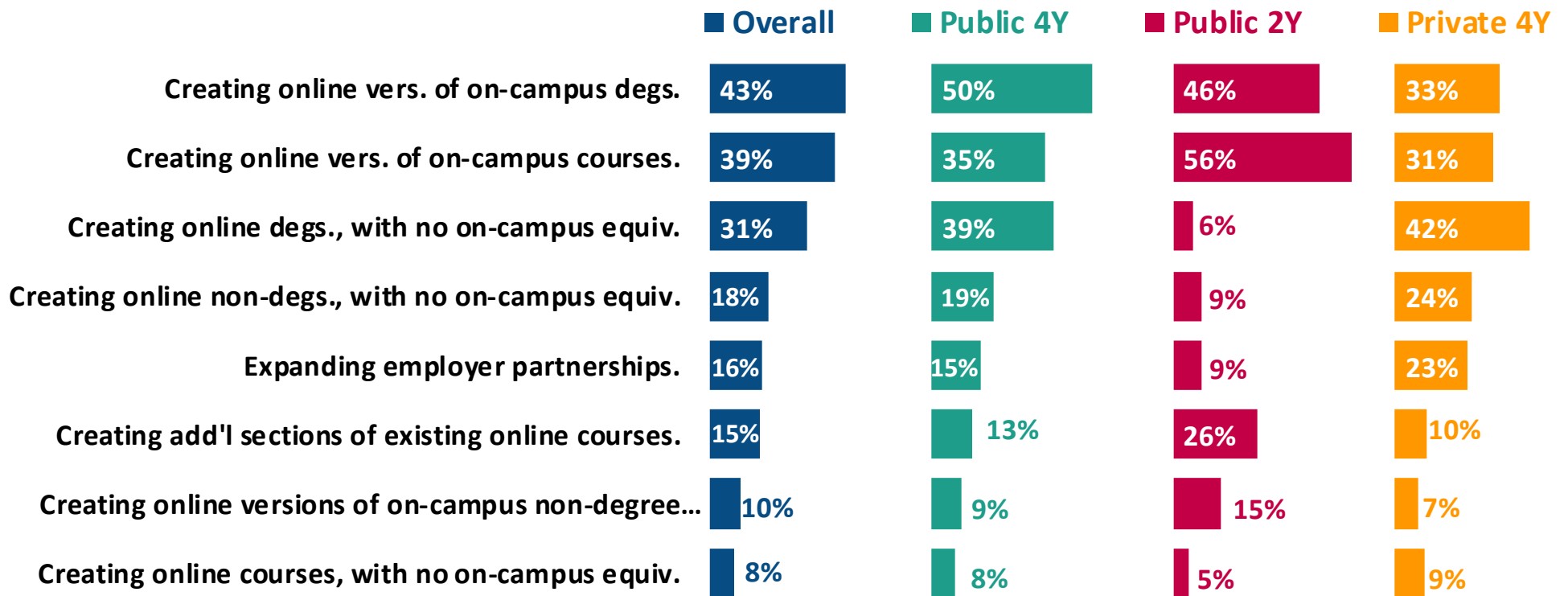


Priorities: Offering Online Versions of Campus Courses and Degrees (Sample = 304)



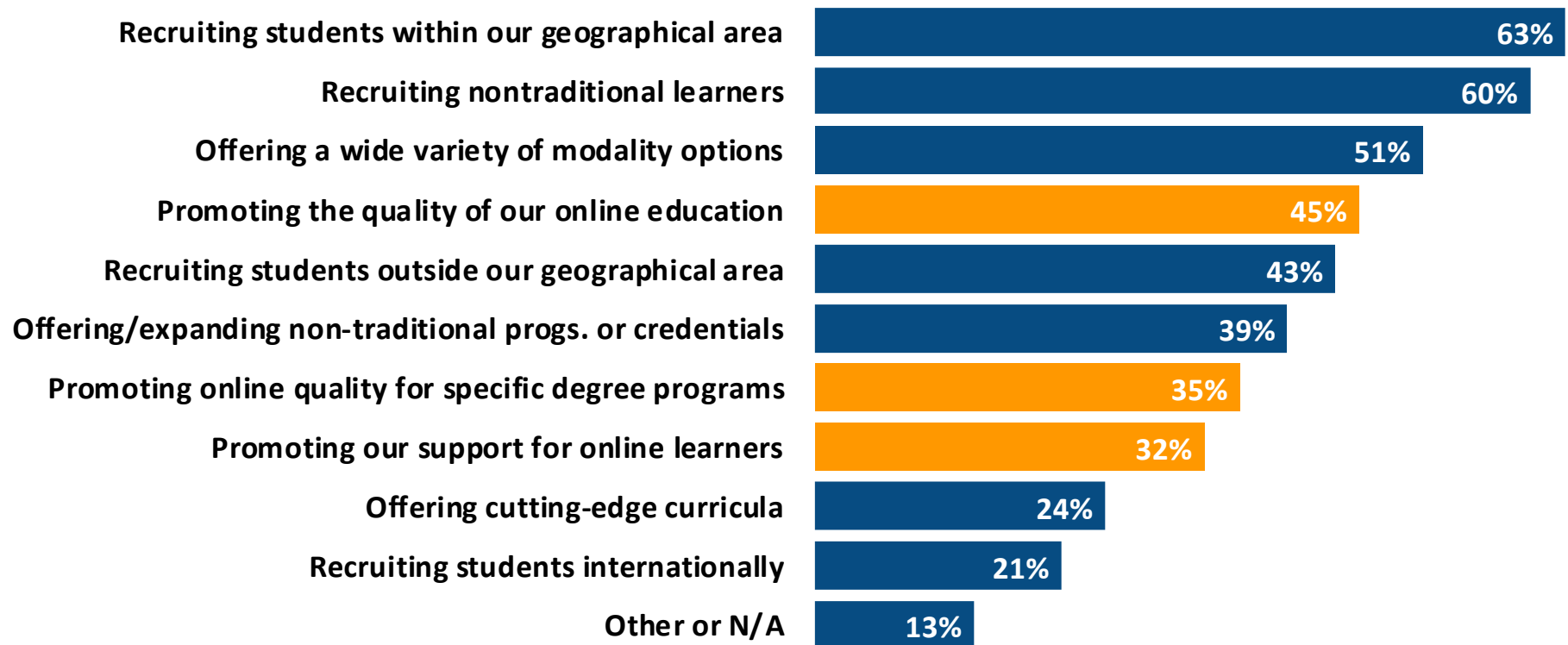
TOP Online Learning Priorities Differ by Sector

(Sample = 299; Public 4Y = 119, Public 2Y = 80, Private 4Y = 100)



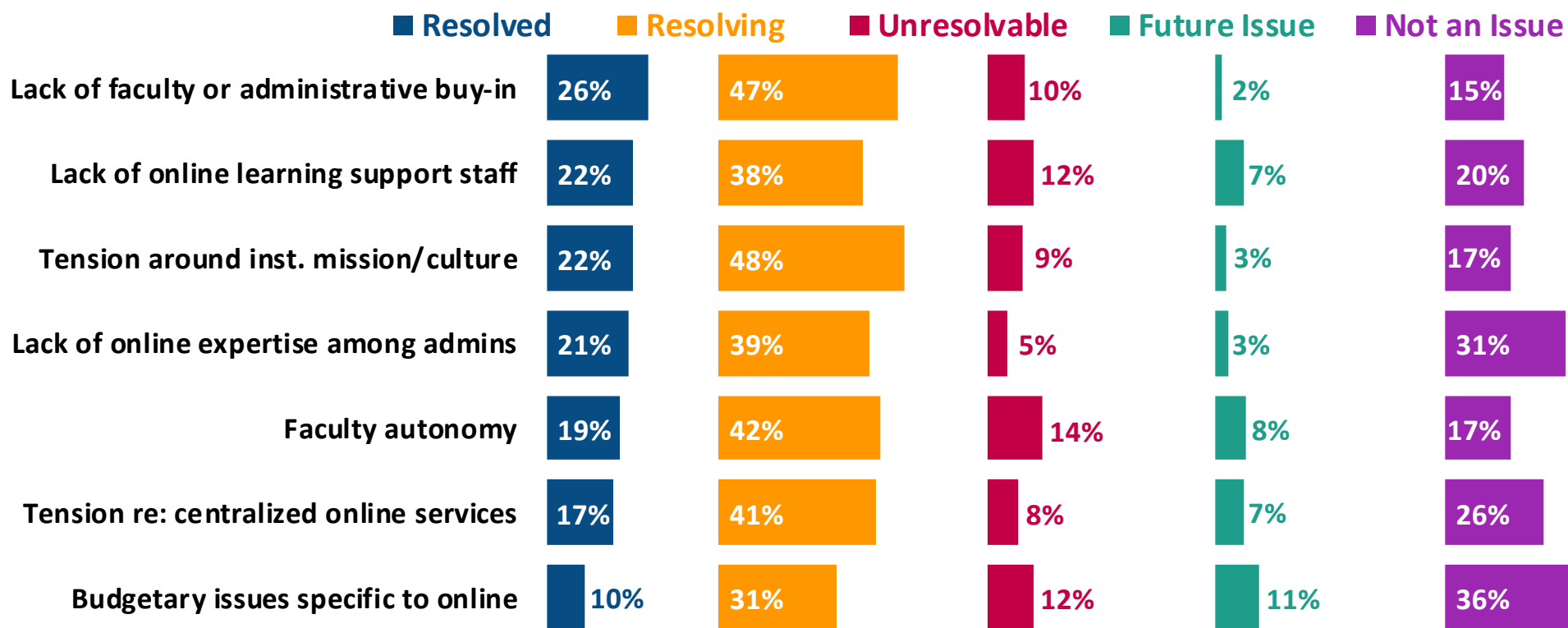
Online Marketplace Focus and Differentiators

(Sample = 302)



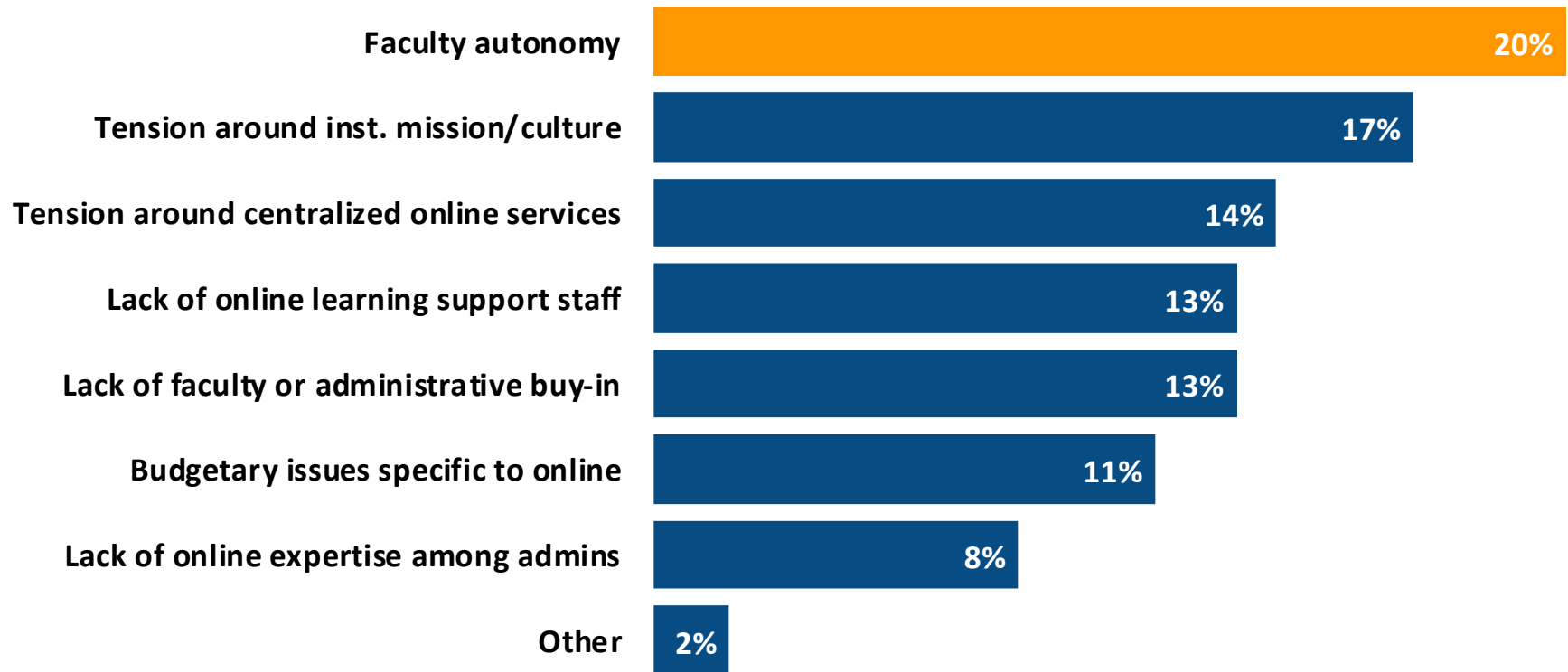
Barriers and Challenges to Online Initiatives

(Sample = 298)



Faculty Autonomy Is Primary Barrier to Online Initiatives

(Sample = 295)



ONLINE REVENUE, FUNDING, and PRICING

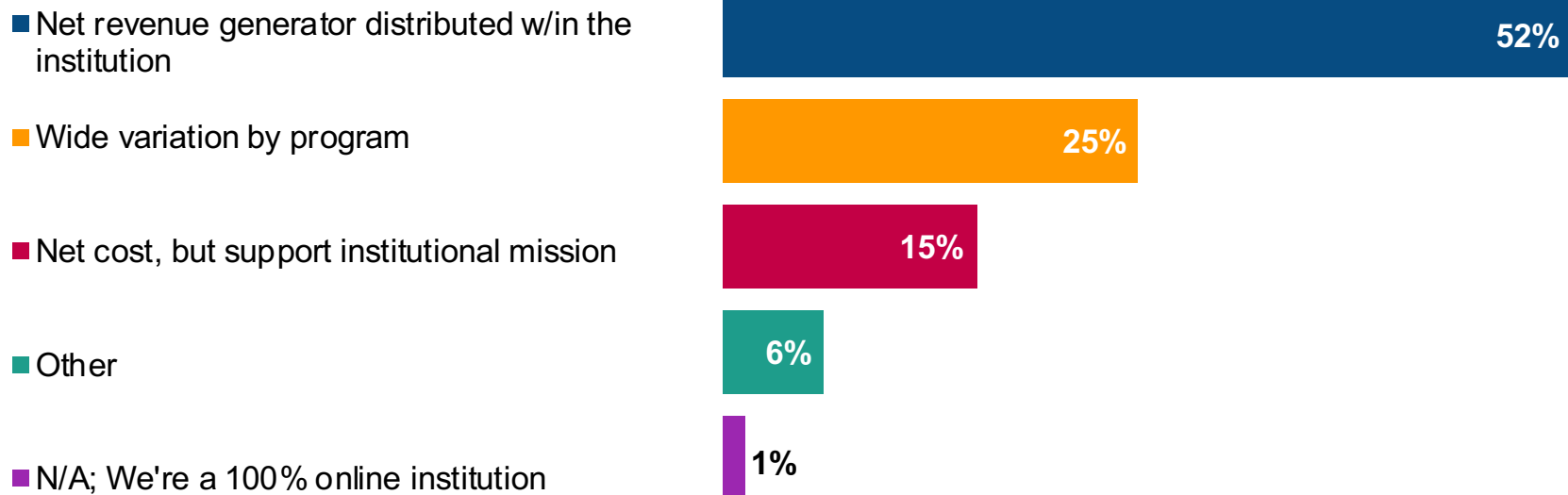


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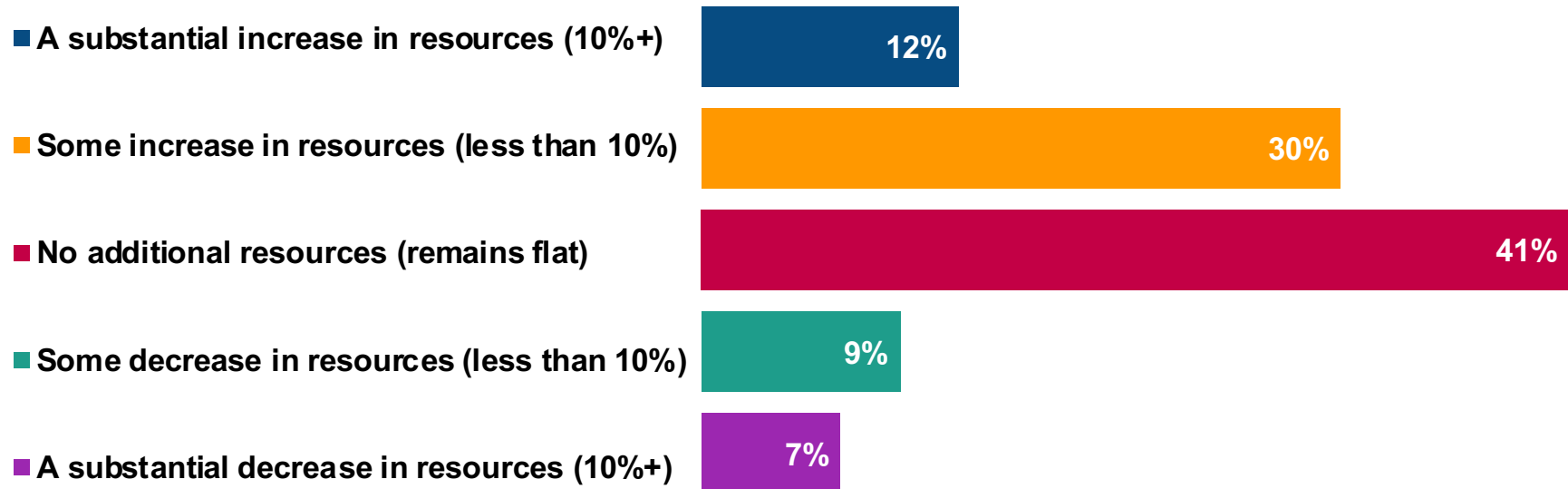


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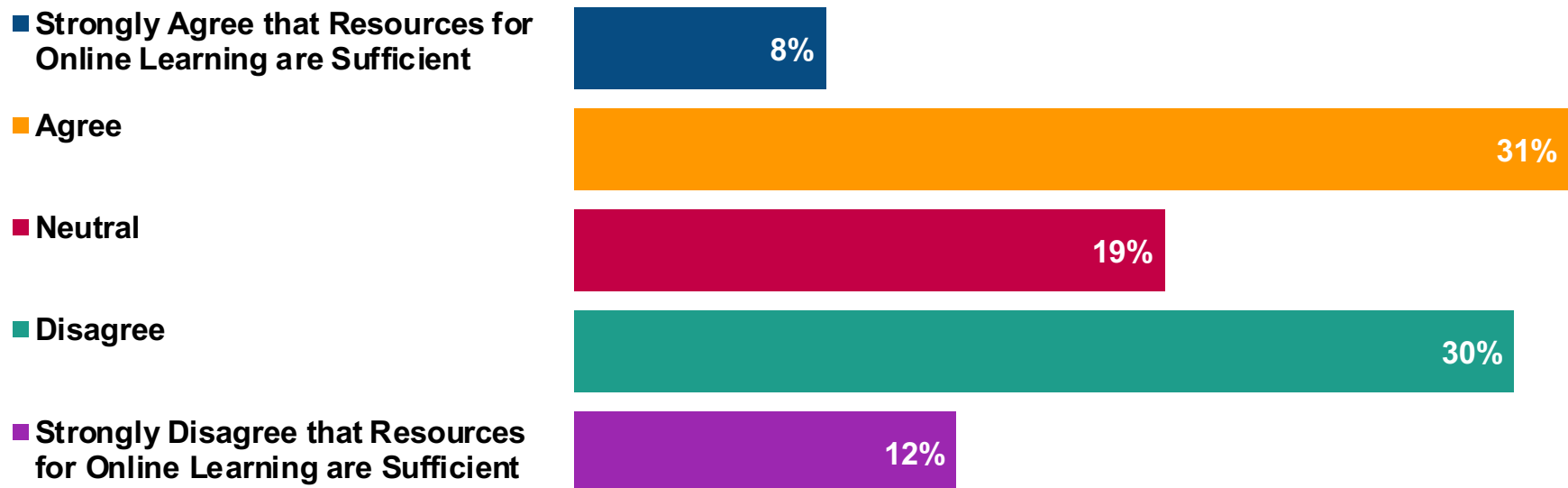
Online Programs Are Net Revenue Generator for Majority of Institutions (Sample = 292)



More Institutions Report Increase in Online Learning Resources (Sample = 286)

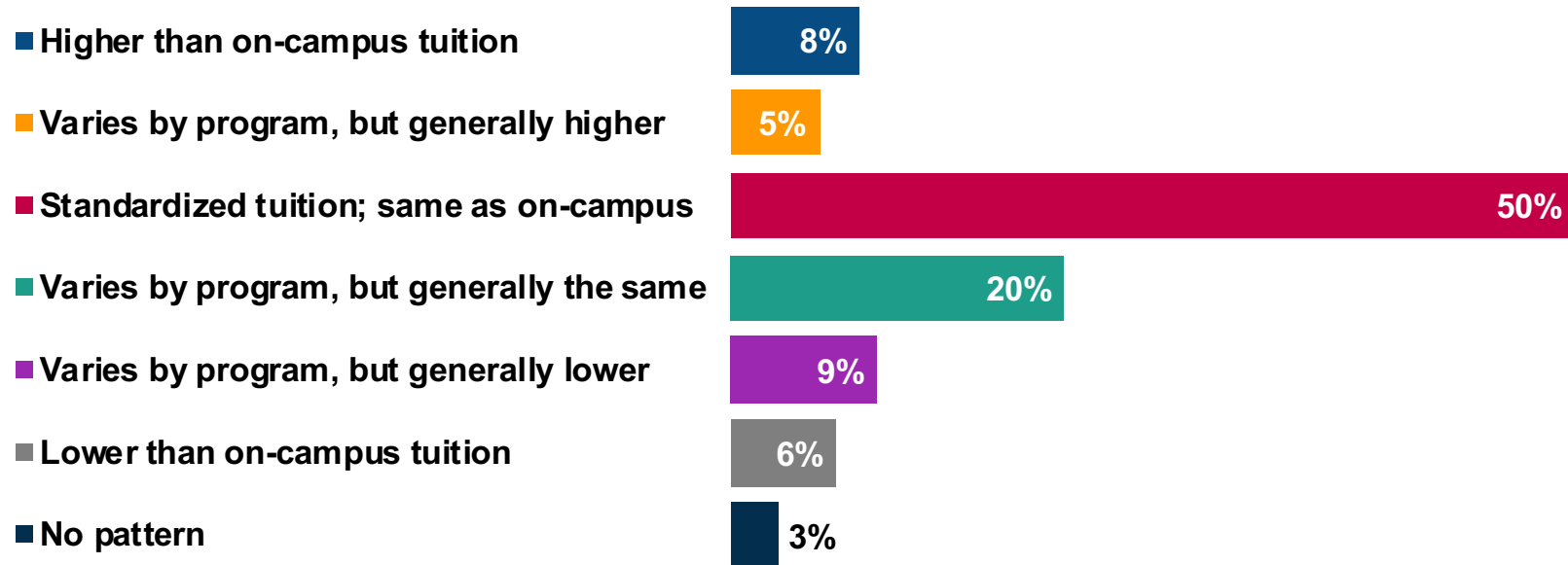


Sufficiency of Institutional Resources for Online Learning Varies (Sample = 289)

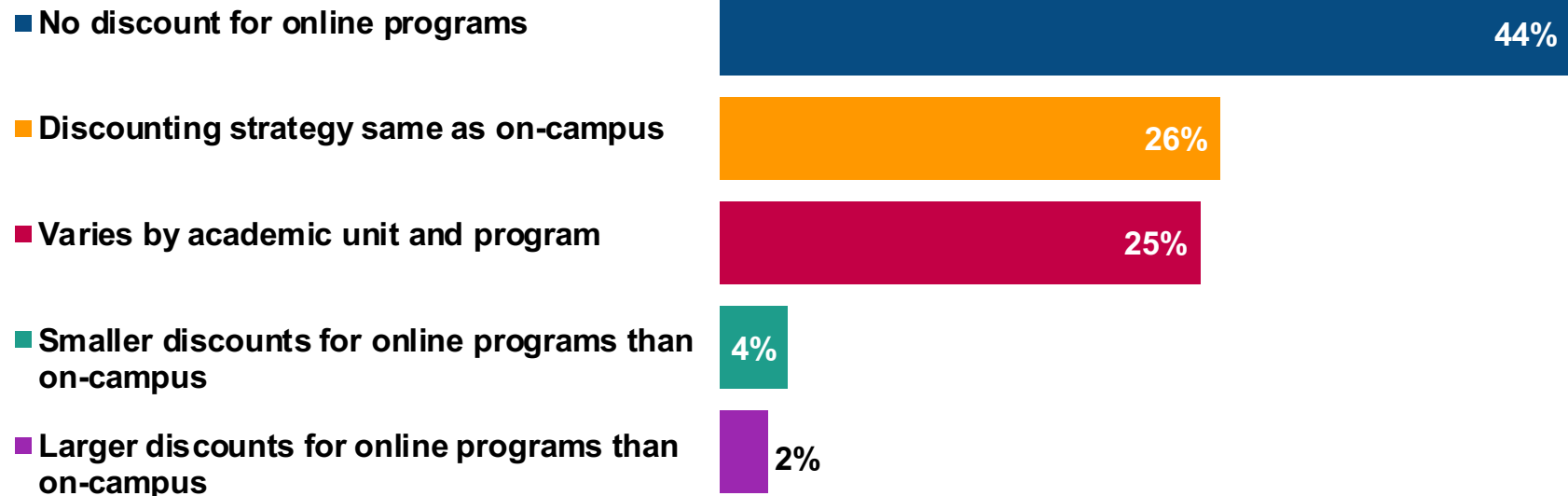


Majority of Institutions Have Standardized Tuition for Online and On-Campus Programs

(Sample = 289)



Most Schools Not Offering Special Discounts for Online Programs (Sample = 284)



AI: Attitudes, Uses, and Policies



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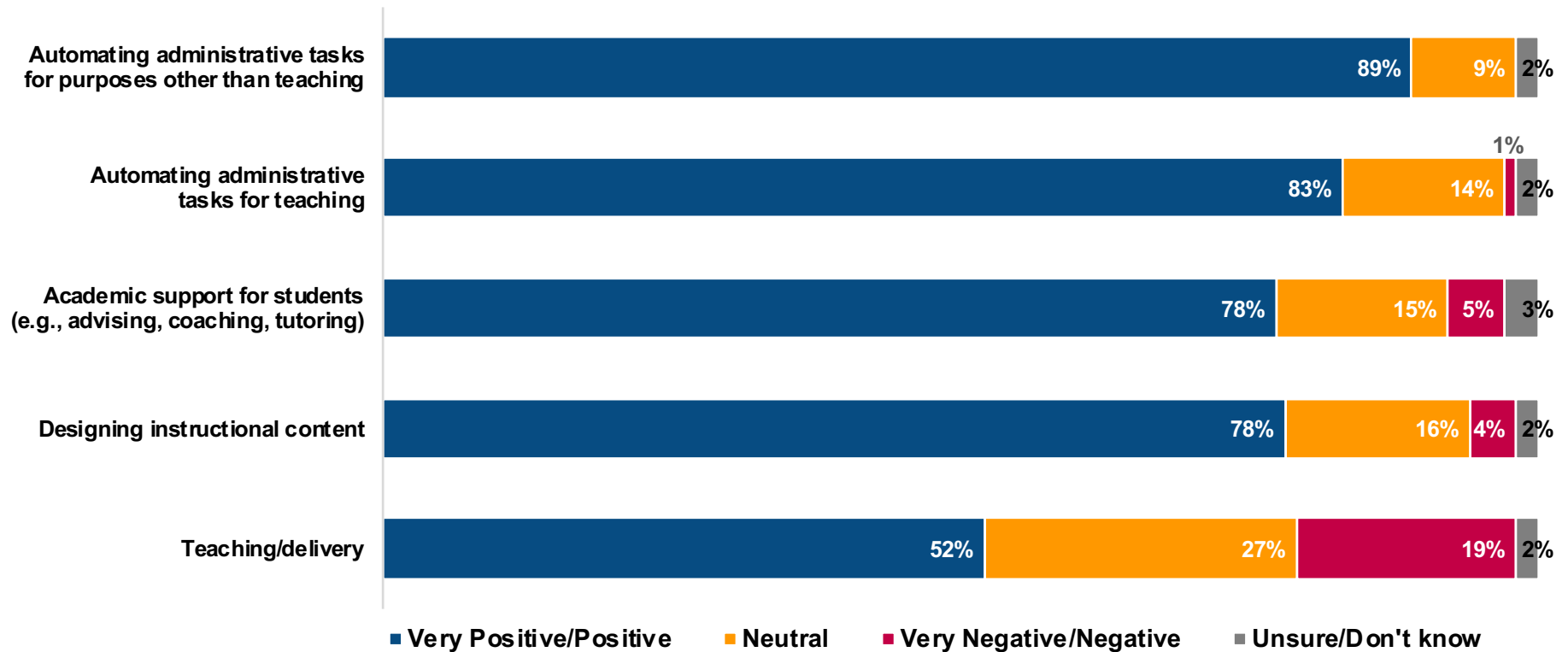
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Using AI in Online Education

Respondents...

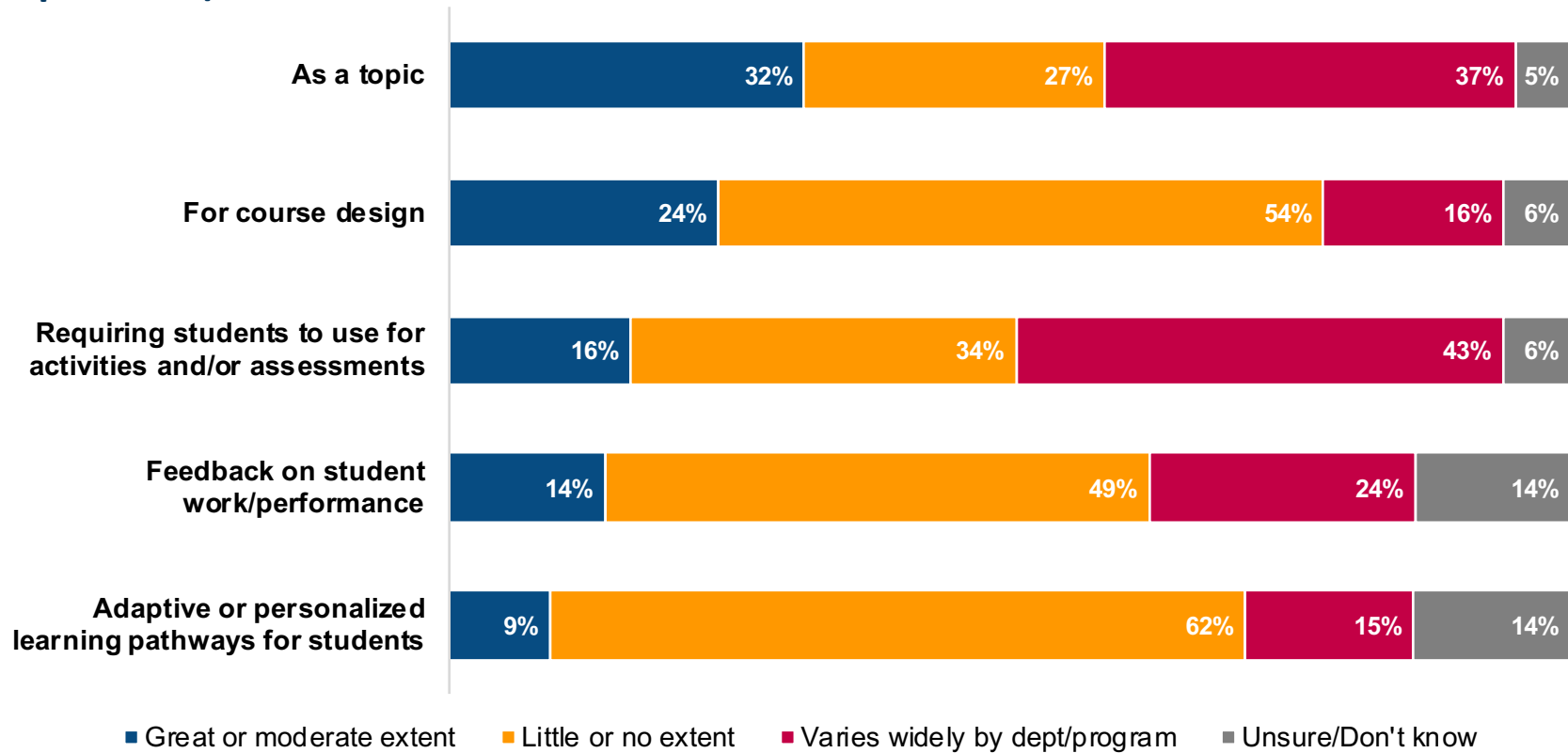
- are generally positive about AI use for administrative work.
- have mixed feelings about AI use for teaching.
- are starting to experiment with AI for both admin work and teaching, but not widely.
- are teaching students to use AI in a variety of ways.
- have mostly either already published AI policies/guidelines or are working on doing so.

COLO Sentiment About AI Use in Online Learning is Largely Positive (Sample = 295)

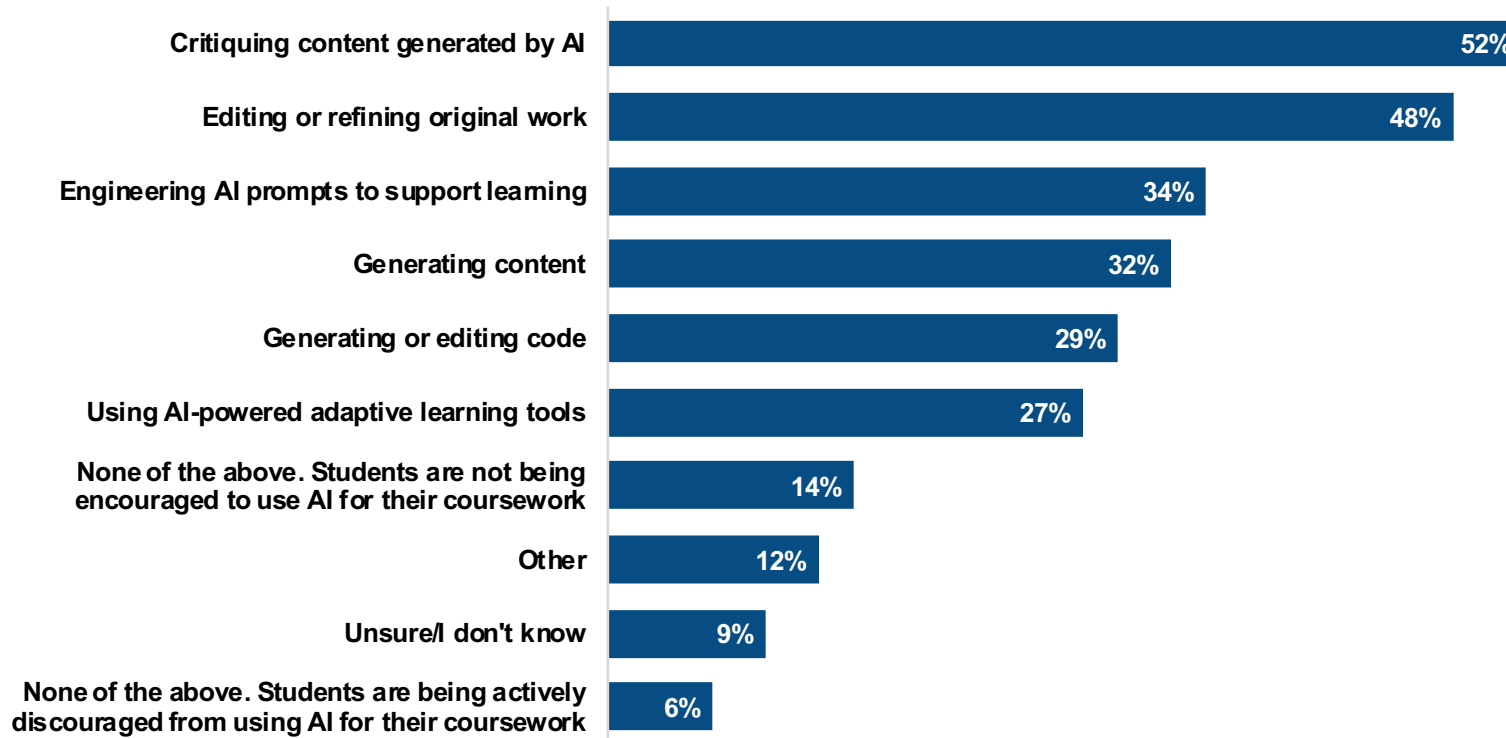


Use of AI Varies at Higher Ed Institutions

(Sample = 293)



Students Encouraged to Use AI in a Variety of Ways in Online Coursework (Sample = 293)



AI for Administrative Institutional Needs Varies

(Sample = 294)

Marketing and student recruitment



Student interventions



Student-facing support



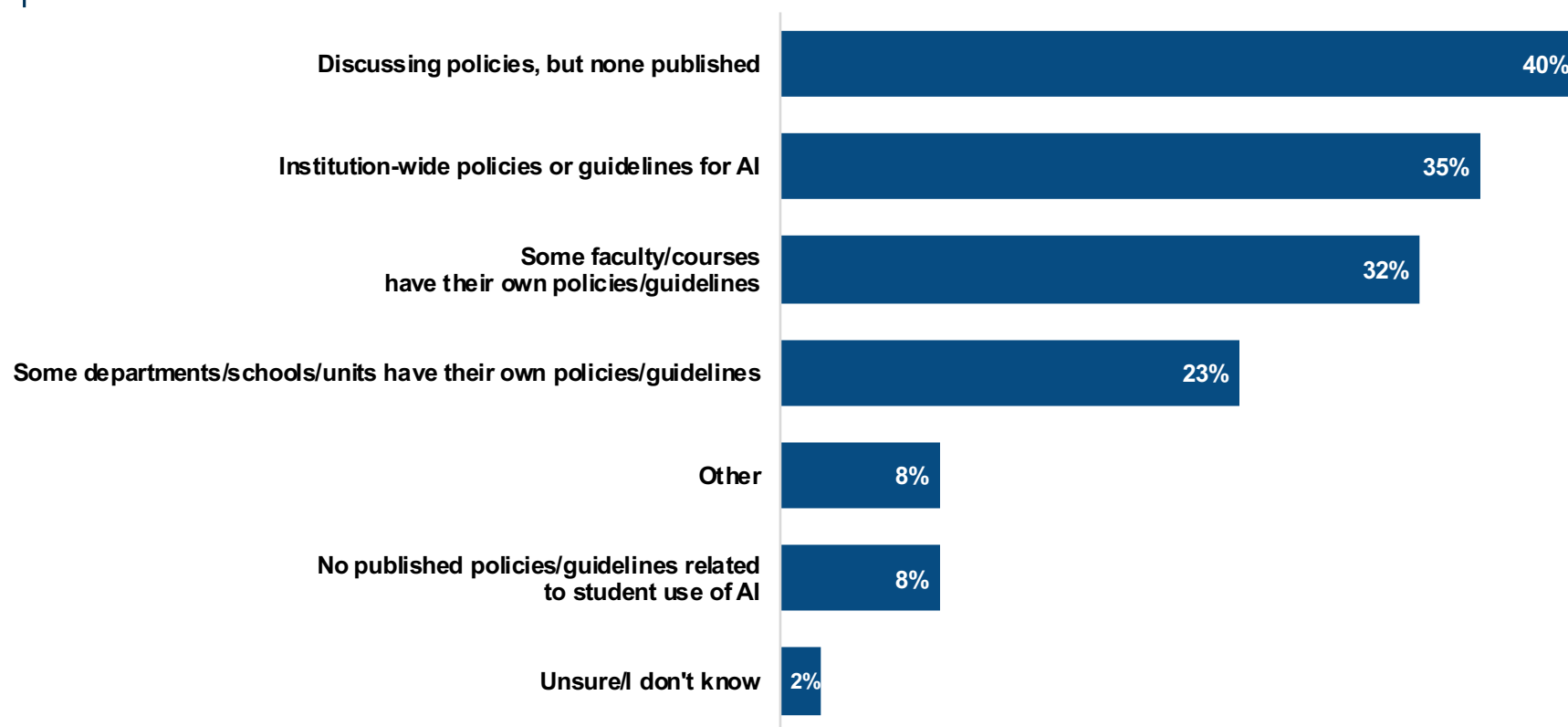
Back office administration



■ Great or moderate extent ■ Little or no extent ■ Varies widely by dept/program ■ Unsure/Don't know

Majority Lack Published Policies for Student Use of AI

(Sample = 295)



Download the CHLOE 9 Report: bit.ly/CHLOE9

CHLOE 9 | Strategy Shift: Institutions Respond to Sustained Online Demand

Download



Student demand for online and hybrid learning continues to grow, and institutions are working to incorporate online into their institutional strategies.

Notable findings from the 53-page report include:

- Priorities for Online Learning
- Tuition and Institutional Revenue
- AI in Higher Education
- Third-Party Servicers
- Regular and Substantive Interaction



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BE A PART OF CHLOE 10

The Changing Landscape of Online Education report is now in its TENTH year!

CHLOE provides the unique view of senior online leaders at U.S. Higher Ed Institutions -- make sure your institution is represented by submitting your survey by Monday March 3rd.

*Need the survey? Have questions?
Email research@qualitymatters.org*



Learning Lab | Designing Hybrid-Flexible (HyFlex) Courses to Support Multimodal Learning Environments – April 2025

Part 1: April 14, 2025 | 12:00–1:30 p.m.ET

Part 2: April 17, 2025 | 12:00–1:30 p.m. ET

Part 3: April 22, 2025 | 12:00–1:30 p.m. ET

Part 4: April 29, 2025 | 12:00–1:30 p.m. ET



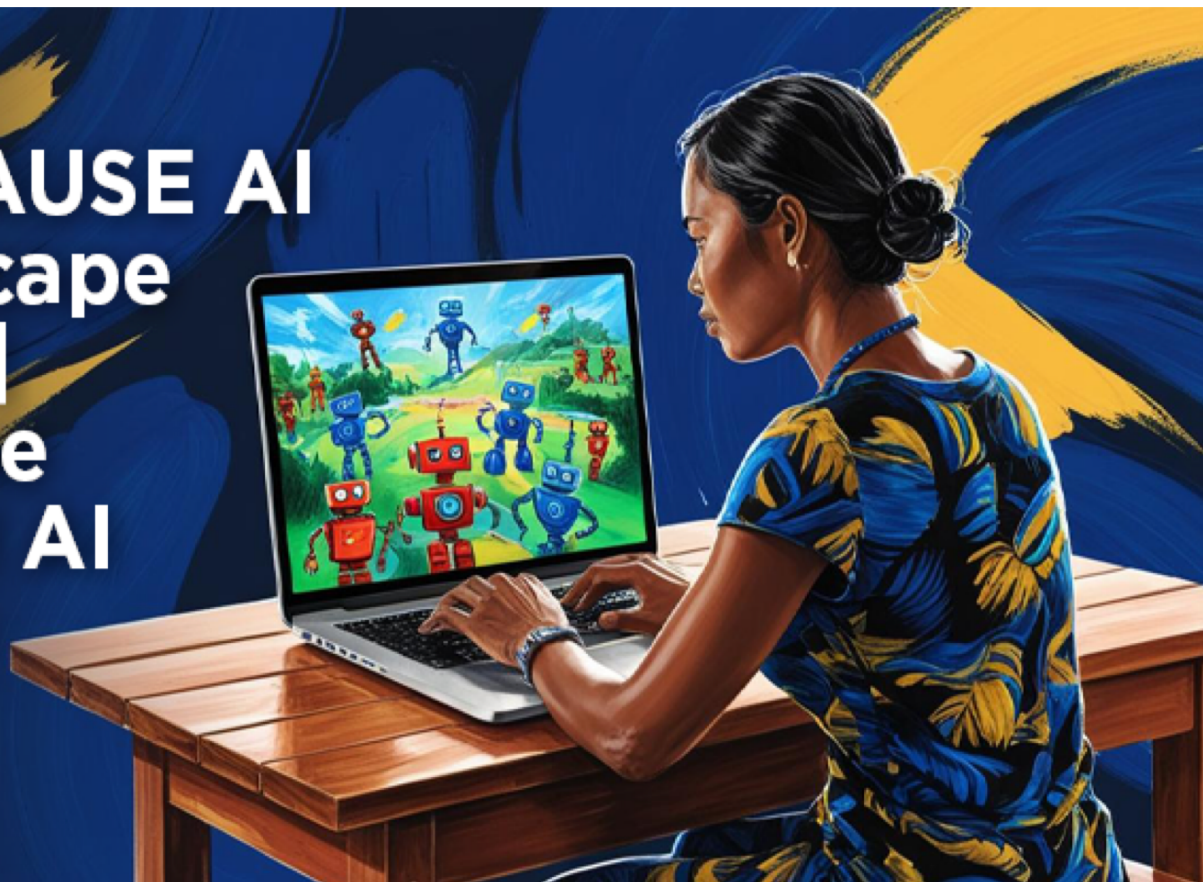
EDUCAUSE Digital Learning Leaders Institute – March 2025

March 31–June 13, 2025
Online

The EDUCAUSE Digital Learning Leaders (DLL) Institute is for professionals whose campus role involves the support, promotion, and leadership of teaching and learning. The curriculum provides a solid foundation for professionals in their current (and future) roles by focusing on critical areas of learning leadership success, academic communication, data-driven solutions, digital leadership and transformation, and technology initiatives. Throughout the program, participants are immersed in a case-based leadership experience while engaged in applied, active learning in small teams.



2025 EDUCAUSE AI Landscape Study | Into the Digital AI Divide



Questions? Comments?

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