Up, down, flat: Distance learning data collection and enrollment patterns in Australia, UK, and USA

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One sign that an "innovative" feature of higher education has truly mainstreamed is when governments start to publish statistics about it. What about one prominent innovation - online learning? The first online degrees appeared over twenty years ago, and played a big part in the dotcom boom of 1997-2000. Since then, despite bouts of skepticism and disillusionment, online features, courses and programs have proliferated in many higher education systems around the world. Most recently, MOOCs (Massive Open Online Courses) sparked another surge of interest.

Online learning has never been short of hyperbole, but what about hard data on student numbers? Are governments collecting the same kinds of data, or are there inconsistencies? What does the data suggest about the health of online learning markets in higher education?

This Observatory analysis looks at the United States, United Kingdom and Australia. Over the years, all have produced grand online higher education schemes of one kind or another- but does online now show up in official statistics?

What about the UK?

In the UK, the official source of higher education data is the Higher Education Statistics Agency. The HESA website now includes "distance learning" data, but appears to have only done so in the last year or so. Different versions of distance learning are not distinguished, and the term appears to encompass both wholly distance provision and minor or voluntary attendance at a conventional campus.

Distance learning statistics are split between undergraduate and postgraduate, and between the Open University, the UK's pioneering distance learning institution founded in 1969, and the rest.

Table 1. For UK, international postgraduate distance enrollment is larger than domestic

UK Higher Education: Distance Learners by Level, 2012/13	Domestic	%	International	%	TOTAL
Undergraduate	177,400	74%	62,535	26%	239,935
Postgraduate	49,020	45%	61,100	55%	110,120
TOTAL	226,420	65%	123,635	35%	350,055

At undergraduate level, distance learners represented about 10% of all domestic students in 2012/13, while the ratio was about 9% at postgraduate level. The Open University accounts for 88% of undergraduate distance students in the UK, which says something about the impact of a national distance institution. For other institutions, distance learning represents a mere 1.5% of domestic undergraduates. At postgraduate level, the Open University commands only about 20% of the market.

In 2012/13, there were about 62,000 undergraduate and 61,000 postgraduate distance learners enrolled in UK programs overseas. This represents about 9% of all international undergraduates enrolled at UK universities, whether studying in the UK or in their home country, and about 20% at postgraduate level. This high postgraduate ratio reflects the scale of the Open University and also University of London International Program, and perhaps also a broader definition of "distance".

There appear to be no HESA data on distance learners by field of study, demographics, or qualifications obtained. Also, there seems to be no institution-level distance learning enrollment data for the UK, at least not in the public domain.

What about Australia?

Australia's Department of Education's *uCube* tool distinguishes between "internal", "external", and "multi-modal" modes of student attendance in higher education. "Internal" refers to campus-based study, whether in Australia or at an Australian campus or other campus-based program overseas. "External" marks to various forms of distance learning, and "multi-modal" means combinations of internal and external. This typology has been in use for many years, and reflects Australia's tradition of pre-online distance learning.

Table 2. In Australia, the higher education distance learning market is almost entirely domestic

Australia Higher Education: Distance Learners by Level, 2012/13	Domestic	%	International	%	TOTAL
Undergraduate	90,423	97%	2,923	3%	93,346
Postgraduate	75,882	92%	6,442	8%	82,324
TOTAL	166,305	95%	9,365	5%	175,670

Unlike the UK, almost all Australia's higher education distance students are domestic. In 2013, among domestic students, external students made up about 13% of undergraduates, and about a third of postgraduates. Multi-modal students constituted a further 11% of undergraduates and 6% of postgraduates. These figures include distance learning enrollment through Open Universities Australia (OUA), an organization that promotes and coordinates distance programs from seven shareholder universities, as well as a growing list of other institutions. OUA accounts for about 28% of total distance enrollment in Table 2. "External" enrollment data is available back to 2001, as well as by institution and field of study. The majority of external domestic enrollment is reported as Business, Education, Health and "Society and Culture".

Like the UK, Australia also publishes data on international students enrolled on Australian programs through distance learning. At undergraduate level, distance learners make up less than 1.5% of international students and about 6% at postgraduate level. About 40% of external overseas enrollment is in Business.

What about the US?

The US Department of Education just released its second year of distance learning data. Prior to this, online learners were tracked through the annual Babson Survey Research Group institutional survey, plus market sizing work by companies like Eduventures. The Department of Education's IPEDS tool permits public access to institution-level distance enrollment data. IPEDS distinguishes wholly distance students and students who take at least wholly distance course as part of a program of study.

Table 3.The US distance market is even more domestic than that in Australia

US Higher Education: Distance Learners by Level, 2012/13	Domestic	%	International	%	TOTAL
Undergraduate	1,961,336	99%	21,106	1%	1,982,442
Graduate	662,099	98%	14,662	2%	676,761
TOTAL	2,623,435	99%	35,768	1%	2,659,203

Wholly distance enrollment represents about 11% of all undergraduates, and about 23% of all graduate students in the US. Among for-profit institutions, distance learning accounts for the majority of students. Among public institutions, by far the largest sector overall, wholly distance students represent 6% of undergraduates and 16% of graduate students. Students who were not wholly distance but did take at least one wholly distance course accounted for another 15% of undergraduates and 8% of graduate students. IPEDS reports number of distance programs - which the UK and Australia do not - but not distance enrollment by program.

Like Australia and the UK, IPEDS breaks out international distance learners. In 2012/13, there were about 21,000 international wholly distance learners at undergraduate level, and about 14,500 at graduate level. These represent about only 1% of wholly distance undergraduates and about 2% of wholly distance graduate students; and the equivalent of about 4% of all international undergraduates in the US and the same proportion of international graduate students.

Table 4 compares distance ratios for all three countries.

Table 4. Australia has a more developed distance learning market in HE than the US

Ratio of Distance Learners	Undergraduate-Domestic	Undergraduate-International	Graduate-Domestic	Graduate-International
Australia	13%	1.5%	32%	6%
UK	10%	9%	9%	20%
US	11%	4%	23%	4%

The domestic undergraduates ratios are aligned, but the others are not. Australia and the UK suggest that distance learning is mainstream at graduate level among domestic students, but this is much less the case in the UK. By contrast, among international students, particularly at graduate level, the UK exhibits the greatest penetration, again pointing to the influence of two large and longstanding distance specialists - Open University and University of London International Program - and perhaps a broader definition of “distance”. It is interesting that Australia appears to have a more developed domestic distance learning market than the US in terms of penetration at undergraduate and graduate level.

Conclusions

So what can we conclude about official distance enrollment data in these three countries? All three now publish annual distance learning figures. Australia and the US focus on wholly distance students, while the UK’s definition appears to also include some majority distance enrollment. Australia and the US, but not the UK, add “some distance” students as a separate category - Australia as simply combinations of distance and face-to-face, and the US as students taking at least one distance course. Institution-level reporting is available in Australia and the US, but not it seems in the UK. Undergraduate and postgraduate students are distinguished in all three national datasets, as are domestic and international students. The Australia and US data call out gender, but not student age (although it is widely acknowledged that few wholly distance degree learners are aged under 25).

Australia leads the way beyond that - delineating full-time/part-time and field of study, and reporting “external” enrollment from 2001 onwards. None of these nations yet reports student graduation rates by delivery mode (Australia does report completions) or where international distance students reside by country. Official reporting is confined to degrees and other credit bearing enrollment, leaving almost all MOOC activity out of the picture. Of course, MOOC providers report their own data.

No doubt immature or inconsistent institutional reporting on distance learners may impact data integrity, but there is no evidence official numbers are fundamentally off.

What about distance enrollment trends over time? There is a mix of growth, flat and decline. In the UK and US we have only two years of data. In the US, wholly distance enrollment for 2012/13 was less than 1% higher than the prior year. International wholly distance learners grew faster- 5% at undergraduate level and 8% at graduate level, but both from a low base. In the UK, domestic distance enrollment fell 16%, while postgraduate dropped by 5%. Among international students, undergraduate distance numbers rose 4% and postgraduate by 8%.

Flat distance enrollment growth in the US may be attributed to the long-term effects of a weak economy, turning cyclical the conventionally countercyclical relationship with higher education. Tougher or more complex regulation impacting distance learning and the for-profit sector is also a factor. In the UK, the steep decline in domestic distance enrollment is part of a wider drop in part-time study following specific government funding restrictions combined with the decision to permit UK universities to triple undergraduate tuition fees. A sustained weak economy is also relevant.

In Australia, the opposite trend pertains. Domestic distance enrollment grew 67% between 2006 and 2013 at undergraduate level, and 53% at postgraduate level, and continued to grow strongly in 2013 over 2012. Yet among international students, between 2006 and 2013, undergraduate distance students fell 67% and fell 41% among postgraduates, with the totals falling steadily year-on-year. In both cases, multi-modal enrollment grew strongly over the period. By 2013, among overseas students at undergraduate level, multi-modal students greatly outnumbered “external” students, and approached the external figure among domestic students. Multi-modal overseas students at postgraduate level also outnumbered their external counterparts, but represent only a fifth of the external figure on the domestic side. These trends suggest the potential of blended learning to maximize the best and minimize the limitations of conventional and distance models.

It is notable that Open Universities Australia reported an enrollment decline in 2013 versus 2012- down 17%. This may reflect burgeoning online offerings from universities generally.

Official data collection may be one sign of the maturation of distance learning in higher education, but another is more complex enrollment growth trends. The Australia, UK and US data indicate that some markets continue to grow strongly, while others are flat or in decline. In some markets, distance learning is the majority delivery mode, while in others it is marginal. Wholly distance has traction in some areas, while blended is on the rise elsewhere. The UK appears to have found sizeable distance markets overseas, while Australia has either pulled back strongly or seen weaker demand. The US is still a bit player cross-border. Does all this mean the cross-border distance market has peaked or is just getting going?

Perhaps the ultimate question for online learning is whether the student experience can evolve to the point that it competes with rather than merely supplements the face-to-face norm.

We have come a long way in terms of official distance learning data collection. Distance learning, across higher education worldwide, is a major Observatory theme. Look out for more discussion in this area, including data collection in additional countries.