Trends in Global Distance Learning

In the following report, Hanover Research presents information on current trends in global distance learning in higher education. This report is divided into two sections - a literature review detailing the current global market for distance learning and typical program offerings, and a selection of case studies for global key players in the distance learning market.
Introduction

Institutions of higher education are increasingly expanding their services and offerings to meet the growing demand for educational opportunities around the world. Traditional students as well as transitioning adults need new ways to gain knowledge and training in order to be competitive in the workforce. Trends in globalization and the global economy have opened up a new set of potential students who demand access to flexible learning opportunities, just as domestic educational offerings in some regions fail to meet student demand. This context provides a valuable opportunity for established institutions to enter the global higher education distance learning market.

In this report, Hanover Research provides an overview of the global market for distance higher education. We begin with an overview of current and future trends in distance education, especially regarding program offerings and student markets. Next, we describe the key players in delivering distance education in two sections: the first focuses on institutions based in English-speaking countries, and the second examines key players worldwide. We also attempt to differentiate traditional universities that offer online programs to increase student access to learning opportunities from mega universities that are solely dedicated to delivering online distance learning programs.

In our review the literature, we identified seven key players in the global higher education distance learning market. An asterisk denotes a traditional postsecondary institution that also offers distance education. The institutions profiled in this report include:

- Open University
- University Of Derby*
- University Of Maryland – University College*
- Drexel University Online*
- Universitas Terbuka (Indonesia Open University)
- Indira Gandhi National Open University (IGNOU)
- University of South Africa (UNISA)

Key Findings

- The major players in global distance education (also known as mega universities) enroll anywhere from 100,000 to over 500,000 students.

- Typical subject areas offered by distance learning providers vary based on the organization and region. However, we found that business and technology are frequently offered program areas, in addition to other professionally-oriented disciplines.
Our analysis showed that Africa and India are two of the growing markets for distance education globally, as these represent nations with high demand for higher education but insufficient existing infrastructure.

Active military personnel and working professionals are two prime target populations for U.S. distance education institutions.

Undergraduate level programs are more commonly offered in distance learning formats in the United States, while graduate level programs are more common in the UK.
Section One: Trends in the Global Distance Learning Market

In this section, we discuss current and future trends in the global distance learning market. We begin with a literature review of current trends in distance learning in the United Kingdom and the United States, and then describe the landscape for distance learning in the coming years.

Current Distance Learning Trends in the United Kingdom

A 2010 study conducted by the Technology-Assisted Lifelong Learning Team at the University of Oxford assessed online distance learning provided by and for UK institutions in the higher education sector. The following key trends were observed:

- The vast majority of online distance learning offered by higher education institutions is at the postgraduate level.

- Courses provided in partnership with commercial organizations are more evenly spread across the higher education levels, but taken in conjunction with those offered directly by institutions the emphasis remains on postgraduate provision.

- Almost all of the online distance learning courses identified could be described as continuing professional development. This was especially true of those courses provided by institutional/private sector partnerships which were heavily biased toward business-oriented programs.

- A significant number of level 4 and level 5 courses were identified that could potentially provide a route into higher education.

- Although the number of level 4 courses was relatively high (approximately one-third of the total), most of these were short standalone courses, typically offering 10 or 20 credits toward a higher education award, which, when framed in terms of study hours, represented much lower volume than online distance learning offerings at levels 5 and above which tended to be award-bearing courses.1

The authors of the study determined that “the online distance learning market in the UK is concentrated around courses in business, law, medicine, science, and education.”2 In addition the majority of the UK’s online distance learning programs offered directly by higher education or further education institutions are either at

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2 Ibid., 8.
level 4 (25 percent) or at level 7 (60 percent), and generally “provide specialist training tailored to specific occupations/professions.” Among UK online courses, business, law, medicine, science, education, social studies, and technology are the most frequently offered subject areas.\(^3\)

Current Distance Learning Trends in the United States

Trends in program offerings appear to be completely different in the United States. The U.S. Department of Education’s National Center for Educational Statistics (NCES) examined distance education offerings at degree-granting postsecondary institutions during the 2006-07 academic year. According to the report, undergraduate degrees constitute the largest percentage of fully-online programs in the United States, followed by graduate or first professional degrees. The breakdown of program levels is displayed in Figure 1.

**Figure 1: Fully-Online Programs Offered at U.S. Institutions by Program Level\(^4\)**

The NCES study also found that the type of online program offered differs according to the type of institution. Table 1 demonstrates the percentage of all U.S. degree-granting postsecondary institutions that offer some form of distance education program, by type of institution. In addition, this table breaks down program offerings by undergraduate level, graduate or professional level, and non-credit offerings. As

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\(^3\) Ibid., 15.

shown, public institutions in the United States are much more likely to offer online courses than private institutions: 97 percent of two-year institutions and 89 percent of four-year institutions offer distance education programs. Among four-year universities, undergraduate level courses are more prevalent than graduate or professional level and non-credit courses. The size of the institution also is important: institutions with enrolments of over 10,000 students were more likely than smaller institutions to offer distance learning courses. The full results are shown below.

Table 1: Total Number of Degree-Granting Postsecondary Institutions, and Percent that Offered Distance Education Courses, by Course Type, Institutional Type, and Institution Size: 2006-07

<table>
<thead>
<tr>
<th>Institution type and size</th>
<th>Total # of institutions</th>
<th>% offered any online, hybrid/blended online, or other distance education courses</th>
<th>% offered college-level credit-granting online, hybrid/blended online, or other distance education courses</th>
<th>% offered noncredit distance education courses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Courses at either level</td>
<td>Undergraduate courses</td>
<td>Graduate or first-professional courses</td>
</tr>
<tr>
<td>by Institution Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public 2-year</td>
<td>1,000</td>
<td>97%</td>
<td>97%</td>
<td>97%</td>
</tr>
<tr>
<td>Private for-profit 2-year</td>
<td>500</td>
<td>18%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Public 4-year</td>
<td>600</td>
<td>89%</td>
<td>88%</td>
<td>87%</td>
</tr>
<tr>
<td>Private not-for-profit 4-year</td>
<td>1,500</td>
<td>53%</td>
<td>53%</td>
<td>51%</td>
</tr>
<tr>
<td>Private for-profit 4-year</td>
<td>300</td>
<td>70%</td>
<td>70%</td>
<td>70%</td>
</tr>
<tr>
<td>by Institution Size</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Size: Less than 3,000</td>
<td>2,700</td>
<td>51%</td>
<td>51%</td>
<td>51%</td>
</tr>
<tr>
<td>Size: 3,000 to 9,999</td>
<td>900</td>
<td>91%</td>
<td>91%</td>
<td>88%</td>
</tr>
<tr>
<td>Size: 10,000 or more</td>
<td>500</td>
<td>97%</td>
<td>96%</td>
<td>93%</td>
</tr>
<tr>
<td>All institutions</td>
<td>4,200</td>
<td>66%</td>
<td>65%</td>
<td>66%</td>
</tr>
</tbody>
</table>

Source: National Center for Education Statistics

A recent report from the Sloan Consortium, an institutional and professional leadership organization dedicated to integrating online education into the mainstream of higher education, identified key trends in online enrolment for various disciplines. The authors reported that although institutions rarely report a decrease in overall enrolments for online programs, the results of their analysis of specific program enrolments were surprising. Of the institutions surveyed, the majority of online programs showed no growth, and some reported small declines in enrolment. As demonstrated in Figure 2, the disciplines experiencing the most cases of decreased enrolment were engineering, education, business, and computer and information

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5 Ibid., 5.
sciences. It is important to note, however that these were the four most common programs offered, indicating that demand for these programs remains high.

**Figure 2: Enrollment Change for U.S. Online Programs by Discipline, 2009-10**

![Enrollment Change for Online Programs by Discipline - Fall 2009 to Fall 2010](image)

Source: The Sloan Consortium

Demand for different types of programs may reflect students’ changing reasons for enrolling in distance education. The Organization for Economic Cooperation and Development (OECD) explains that as online learners become older and use distance learning programs as a means of advancing within their careers, distance learning programs must meet those needs. The OECD writes that:

> Learners increasingly seek courses that allow them to update their knowledge throughout their working lives. In addition, as learners seek to acquire particular knowledge or skills to satisfy labor market needs, more and more prefer to pick and choose courses from the most suitable providers, rather than studying a traditional clearly defined program at one institution.

**Future Trends in Distance Learning**

The future of global distance learning looks optimistic: in the Sloan Consortium’s survey, **many more U.S. institutions reported seeing an increase in demand for online courses and programs than for face-to-face programs in 2010**. Nearly three-quarters (74.5 percent) of all institutions participating in the survey reported an

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increase in the demand for online courses and programs as a result of the economic downturn, compared to just 48.8 percent reporting an increase in demand for face-to-face courses. As demonstrated in Figure 3, the difference in demand is most significant for private nonprofit institutions, suggesting that the future of distance learning may include more competition from that sector of postsecondary education.

**Figure 3: Percentage of Institutions Agreeing that Economic Conditions Lead to an Increase in Demand for Online and Face-to-Face Courses**

![Figure 3: Percentage of Institutions Agreeing that Economic Conditions Lead to an Increase in Demand for Online and Face-to-Face Courses](image)

The future market for global distance education appears to be in favor of developing countries that lack the domestic capacity to establish their own higher education infrastructure. The ICDE provides an example that “given the combined population in Asia, South America, and Africa, to reach a level of post-secondary penetration equal to that of developed countries, they would have to build tens of thousands of traditional universities, each accommodating 40,000 students.” Distance education therefore provides a highly efficient and cost-effective method of reaching these populations that are especially receptive to outside providers.

**India**

India, in particular, has one of the fastest rates of adoption for distance learning. This is in part due to legislation that “ensures that a government or public sector employee who earns an online degree will benefit from an increase in both pay scale and pension.” As it stands, the ICDE reported that “approximately 24 percent

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9. Ibid.
10. Ibid., 12.
of all higher education students in India are enrolled in distance education institutions, specifically in the 13 national and state open universities and the 106 institutions, mostly public, which offer both on-campus and correspondence programs."\textsuperscript{12} However, according to a 2007 study conducted by the Commonwealth of Learning, there remains "vast potential in a country like India with millions of young aspirants eager to receive higher education and with conventional universities and colleges simply not being in a position to accommodate them."\textsuperscript{13}

Africa

Africa also has been identified as a potential market for expansion of global distance learning. The continent's current participation rate in higher education is less than 45 percent overall, and in some areas of Sub-Saharan Africa, participation is less than 2 percent.\textsuperscript{14} Barney Pityana, Vice-Chancellor of the University of South Africa (UNISA), declared that Africa has the greatest demand for higher education, and often the smallest capability to deliver it domestically. The continent currently only houses two institutions that offer distance learning, UNISA and the African Virtual University. Willingness and local governmental support may encourage higher education growth from outside the continent.\textsuperscript{15}

Curriculum Internationalization

In terms of future trends in program offerings, the ICDE reports that many institutions are faced now with the task of “internationalizing” their curricula: “In addition to cross-border international initiatives by higher educational institutions, attempts to internationalize the curriculum have gained momentum. Some assert that the curriculum is the most important element in the provision of an international education, and argue persuasively that internationalized curricula are integral to any process of internationalization.”\textsuperscript{16} The real push for internationalizing curricula to the greatest extent possible is that students must take what they have learned and make it applicable to career opportunities in the global market place, not just in the West or for use in their home country. Curricula must be more flexible as new generations of students have a greater concern about the link between their studies and advancing in their careers.\textsuperscript{17}

\textsuperscript{17} Ibid., 18.
Section Two: Key Players in English-Speaking Countries

In this section we provide profiles of key players from English-speaking countries. We specifically focus on the UK and US because, according to The Economist, “distance-learning programs have traditionally been concentrated in [these countries as] …both have a tradition of ‘correspondence courses,’ the precursors of distance learning.”18

Overview of Distance Learning in English-Speaking Countries

Although we were unable to identify any comprehensive enrolment guides for all institutions offering distance education, the Economist does provide enrolment and demographic data for the leading distance MBA programs. As demonstrated in Table 2, MBA programs vary with regard to the number of students enrolled and the number of cohorts each year. The average age tends to be in the mid-thirties, although some programs accept younger students on average. Women appear to be underrepresented in distance MBA programs across the board. The majority of “key players” in MBA programs, according to the Economist, are located in the UK and US.

<table>
<thead>
<tr>
<th>School</th>
<th>Location</th>
<th>Student Intake (# Intakes Per Year)</th>
<th>Avg. Age</th>
<th>Age Range</th>
<th>% Women Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aston Business School</td>
<td>Birmingham, Britain</td>
<td>10 (3)</td>
<td>29</td>
<td>23-41</td>
<td>25</td>
</tr>
<tr>
<td>Bradford School of Management</td>
<td>Bradford, Britain</td>
<td>30 (4)</td>
<td>32</td>
<td>26-42</td>
<td>36</td>
</tr>
<tr>
<td>Curtin University Graduate School of Business</td>
<td>Perth, Australia</td>
<td>40 (3)</td>
<td>34</td>
<td>25-49</td>
<td>34</td>
</tr>
<tr>
<td>Euro*MBA</td>
<td>Netherlands, France, Spain, Germany, Poland</td>
<td>10 (2)</td>
<td>36</td>
<td>30-40</td>
<td>30</td>
</tr>
<tr>
<td>University of Florida—Hough Graduate School of Business</td>
<td>Florida, United States</td>
<td>56 (2)</td>
<td>29</td>
<td>25-38</td>
<td>27</td>
</tr>
<tr>
<td>Henley Business School at the University of Reading</td>
<td>Henley-on-Thames, Britain</td>
<td>60 (20)</td>
<td>35</td>
<td>28-44</td>
<td>36</td>
</tr>
<tr>
<td>IE Business School</td>
<td>Madrid, Spain</td>
<td>32 (2)</td>
<td>35</td>
<td>31-42</td>
<td>17</td>
</tr>
<tr>
<td>Imperial College Business School</td>
<td>London, Britain</td>
<td>35 (1)</td>
<td>35</td>
<td>26-45</td>
<td>36</td>
</tr>
<tr>
<td>Open University Business School</td>
<td>Milton Keynes, Britain</td>
<td>1,000 (2)</td>
<td>37</td>
<td>25-60</td>
<td>35</td>
</tr>
<tr>
<td>Royal Holloway School of Management</td>
<td>London, Britain</td>
<td>50 (2)</td>
<td>36</td>
<td>29-45</td>
<td>47</td>
</tr>
</tbody>
</table>

19 Ibid., 10-17.
<table>
<thead>
<tr>
<th>School</th>
<th>Location</th>
<th>Student Intake (# Intakes Per Year)</th>
<th>Avg. Age</th>
<th>Age Range</th>
<th>% Women Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thunderbird School of Global Management</td>
<td>Arizona, United States</td>
<td>28-50 (2)</td>
<td>31</td>
<td>24-60</td>
<td>29</td>
</tr>
<tr>
<td>Warwick Business School</td>
<td>Coventry, Britain</td>
<td>150 (2)</td>
<td>36</td>
<td>31-45</td>
<td>25</td>
</tr>
</tbody>
</table>

Source: The Economist

UK Providers

The afore-mentioned study conducted at Oxford University identified over 2,600 online and distance learning courses offered by, or on behalf of, UK higher education and further education (FE) institutions. These include:

- 1,528 courses offered by 113 higher education and FE institutions, of which 510 were identified as being delivered online (including blended learning)
- 952 courses offered by the Open University, of which 600 were dependent on the web and a further 95 were delivered fully online
- 175 courses offered in partnership with commercial partners

The study included an analysis of online global visibility of UK online distance learning providers. The following UK institutions were identified as high-visibility programs:

- University of Cambridge International Examinations (CIE)
- University of Derby
- University of London
- Open University
- University of Oxford – Department for Continuing Education
- Sheffield College
- University of Bedfordshire
- University of Central Lancashire
- The Robert Gordon University (Aberdeen Business School)

The study also identified the following commercial providers of online distance learning as having a high level of global visibility:

- Distance Learning Center
- Elearn UK
- ICS
- Kaplan Open Learning
- learndirect/Ufi

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Promethean Learning
RDI
Brighton School of Business and Management
First Choice Learning College
Home Learning College
Study from Home21

US Providers

Enrolment in US distance learning programs is increasing steadily: according to the Sloan Commission, total enrolment is increasing at a much faster rate than enrolment in all other higher education programs. Between 2008 and 2009, the total higher education enrolment in the US increased just over 1 percent, while the number of students enrolled in at least one online course increased by 21.1 percent. As of 2009, online enrolment represents almost one-third (29.3 percent) of all higher education enrolment in the US. The detailed findings are listed in Table 3 below.

Table 3: Total and Online Enrolment in U.S. Degree-Granting Postsecondary Institutions – Fall 2002 through Fall 200922

<table>
<thead>
<tr>
<th></th>
<th>Total Enrolment</th>
<th>Annual Growth Rate Total Enrolment</th>
<th>Students Taking at Least One Online Course</th>
<th>Annual Growth Rate Online Enrolment</th>
<th>Online Enrolment as a Percentage of Total Enrolment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2002</td>
<td>16,611,710</td>
<td>--</td>
<td>1,602,970</td>
<td>--</td>
<td>9.6%</td>
</tr>
<tr>
<td>Fall 2003</td>
<td>16,911,481</td>
<td>1.8%</td>
<td>1,971,397</td>
<td>23.0%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Fall 2004</td>
<td>17,272,043</td>
<td>2.1%</td>
<td>2,329,783</td>
<td>18.2%</td>
<td>13.5%</td>
</tr>
<tr>
<td>Fall 2005</td>
<td>17,487,481</td>
<td>1.2%</td>
<td>3,180,050</td>
<td>36.5%</td>
<td>18.2%</td>
</tr>
<tr>
<td>Fall 2006</td>
<td>17,758,872</td>
<td>1.6%</td>
<td>3,488,381</td>
<td>9.7%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Fall 2007</td>
<td>18,248,133</td>
<td>2.8%</td>
<td>3,938,111</td>
<td>12.9%</td>
<td>21.6%</td>
</tr>
<tr>
<td>Fall 2008</td>
<td>18,698,630</td>
<td>2.5%</td>
<td>4,606,353</td>
<td>16.9%</td>
<td>24.6%</td>
</tr>
<tr>
<td>Fall 2009</td>
<td>19,036,860</td>
<td>1.2%</td>
<td>5,579,022</td>
<td>21.1%</td>
<td>29.3%</td>
</tr>
</tbody>
</table>

Source: The Sloan Consortium

A 2006-07 survey of higher education institutions in the United States found that 32 percent offered fully online college degrees or certificate programs. In total, 65 percent of U.S. institutions offered some type of online, hybrid or blended online or other distance education coursework or programs.23 Numerically, 3,750 two-year institutions and 7,490 four-year institutions offered fully online

21 Ibid., 24.
programs. The U.S. News & World Report lists the following institutions as the top 10 largest online schools that enroll a majority of students online, as of fall 2009:

- University of Phoenix
- Kaplan University
- Strayer University
- Ashford University
- Liberty University
- Walden University
- University of Maryland – University College
- Grand Canyon University
- Capella University
- American Public University System

Profiles: Key Players from English-Speaking Countries

Open University

OU was founded to open up higher education to all, regardless of their circumstances or where they live. OU’s enrolment is diverse, including the following types of learners:

- School students wanting experience of university-level study
- School leavers who chose to study for a degree while engaged in their careers
- Working adults hoping to develop or update their skills, or change careers entirely
- Retired people wanting to explore new interests and keep mentally active.

The University has no formal entry requirements, either prior qualifications or experience. OU’s website, OpenLearn, makes course material and other educational resources available free of charge to potential learners anywhere in the world without having to register as students. Open University was the first British university to join the iTunes University and now has more than 250,000 downloads of its material each week. More than 15,000 research publications are now freely available to view and consult via Open Research Online, one of the largest university research collections in the UK.

Open learning means students work wherever they choose, in their own homes, workplaces, a library, or a study center, and can plan their coursework around their other commitments. **Supported open learning** means students have:

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24 Ibid., 11.
http://www.usnews.com/education/online-education/slideshows/10-largest-online-schools/
26 The Open University. http://www.open.ac.uk/
- Support from a tutor or online forum to help with module material, activities and assignments
- Student advisers and study facilities in their own region, and
- Contact with other students at tutorials, day schools or through online conferencing, online social networks, informal study groups, and events

Modules are developed by multi-disciplinary course teams. These include respected academics from other universities working alongside OU colleagues; educational technologists and media specialists contributing pedagogic and technical expertise; and external assessors to ensure academic standards are consistent with other universities.

**Residential work is a compulsory component of some the degrees.** Some language courses still include a week-long compulsory residential course; other language residential portions are offered as stand-alone modules. Many of the MBA modules include a residential course held over a weekend. Science courses involving lab work also may require meeting times.

The majority of OU’s over 250,000 students are between the ages of 25 and 54. The University publishes the following data about its students:

**Table 4: OU Student Data, 2007-08 and 2008-09**

<table>
<thead>
<tr>
<th>Student Distribution</th>
<th>2007-08</th>
<th>2008-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>151,727</td>
<td>158,030</td>
</tr>
<tr>
<td>Scotland</td>
<td>14,092</td>
<td>15,049</td>
</tr>
<tr>
<td>Wales</td>
<td>6,953</td>
<td>7,736</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>3,705</td>
<td>3,953</td>
</tr>
<tr>
<td>Republic of Ireland</td>
<td>3,529</td>
<td>3,594</td>
</tr>
<tr>
<td>Other EU</td>
<td>8,940</td>
<td>9,200</td>
</tr>
<tr>
<td>Non-EU</td>
<td>7,779</td>
<td>7,503</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>229,215</strong></td>
<td><strong>251,203</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Qualifications Awarded</th>
<th>2007-08</th>
<th>2008-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation Degrees</td>
<td>--</td>
<td>269</td>
</tr>
<tr>
<td>First Degrees</td>
<td>--</td>
<td>9,676</td>
</tr>
<tr>
<td>Higher Degrees</td>
<td>--</td>
<td>2,519</td>
</tr>
<tr>
<td>Undergraduate Certificates and Diplomas</td>
<td>--</td>
<td>18,904</td>
</tr>
<tr>
<td>Postgraduate Certificates and Diplomas</td>
<td>--</td>
<td>3,311</td>
</tr>
<tr>
<td>Validated Awards</td>
<td>--</td>
<td>10,106</td>
</tr>
</tbody>
</table>

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Student FTEs by Subject Area

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>2007-08</th>
<th>2008-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subjects allied to medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Biological and Physical Sciences</td>
<td>1,957</td>
<td>2,045</td>
</tr>
<tr>
<td>Mathematical Sciences</td>
<td>11,659</td>
<td>11,929</td>
</tr>
<tr>
<td>Computer Science</td>
<td>4,762</td>
<td>4,988</td>
</tr>
<tr>
<td>Engineering and Technology</td>
<td>2,853</td>
<td>3,102</td>
</tr>
<tr>
<td>Social Studies</td>
<td>5,500</td>
<td>5,351</td>
</tr>
<tr>
<td>Law</td>
<td>14,073</td>
<td>15,335</td>
</tr>
<tr>
<td>Business and Administrative Studies</td>
<td>2,329</td>
<td>2,467</td>
</tr>
<tr>
<td>Biological and Physical Sciences</td>
<td>7,546</td>
<td>8,154</td>
</tr>
<tr>
<td>Mass Communications and Documentation</td>
<td>183</td>
<td>115</td>
</tr>
<tr>
<td>Languages</td>
<td>7,623</td>
<td>7,327</td>
</tr>
<tr>
<td>Historical and Philosophical Studies</td>
<td>8,853</td>
<td>8,734</td>
</tr>
<tr>
<td>Creative Arts and Design</td>
<td>607</td>
<td>1,126</td>
</tr>
<tr>
<td>Education</td>
<td>6,170</td>
<td>5,950</td>
</tr>
<tr>
<td>Total Student FTEs</td>
<td>74,114</td>
<td>76,621</td>
</tr>
</tbody>
</table>

OU has the following schools:

- School of Arts and Humanities
- School of Childhood and Youth
- School of Education
- School of Environment, Development and International Studies
- School of Languages
- School of Mathematics and Statistics
- School of Science
- School of Business and Management
- School of Computing and ICT
- School of Engineering and Technology
- School of Health and Social Care
- School of Law
- School of Psychology
- School of Social Sciences

Within these schools, OU currently offers the following programs: 28

**Undergraduate and Postgraduate:**

- Arts and Humanities
- Business and Management
- Childhood and Youth
- Computing and ICT
- Health and Social Care
- Languages
- Law
- Mathematics and Statistics

28 “Study at the OU.” The Open University. http://www3.open.ac.uk/study/
Education
Engineering and Technology
Environment, Development and International Studies

Psychology
Science
Social Science

Research Degrees:

Art History
Business and Management
Chemistry and Analytical Sciences
Classical Studies
Computing
Design
Development Studies
Earth and Environmental Sciences
Economics
Education and Educational Technology
English
Geography
Health, Social Work and Social Care
History

Languages and Applied Linguistics
Life Sciences
Materials Engineering
Mathematics
Music
Philosophy
Physics and Astronomy
Planetary and Space Sciences
Politics and International Studies
Psychology

Religious Studies
Social Policy and Criminology
Sociology
Statistics

Professional Skills:

Change Management
Clinical Leadership
Communications
Financial Management
Food Science Skills
General Management Skills
Human Resource Management
IT Skills
Key Corporate Skills

Leadership
Marketing
People Management
Problem Solving
Project Management
Strategy
Travel Planning
Updating Teacher Practice Skills
University of Derby

In addition to the University of Derby’s two campuses in Derby and in Buxton, students are able to enroll in more than 20 vocational and professional courses through the University’s Flexible and Partnership Learning faculty. As of 2009, the total number of online learners at the University was almost 2,000, representing 17 percent of the total part-time student population. Psychology is currently one of the fastest growing courses offered online, with a combined part-time and full-time enrolment of 300 as of 2009.  

The University of Derby’s online courses are offered at a wide range of levels, from foundation degrees to the master’s level. A full list of current offerings is presented below:

- Business Studies (BA Hons)
- Clinical Supervision (PG Cert)
- Cognitive Behavioural Skills (University Advanced Diploma)
- Counseling Studies and Skills (University Diploma)
- Education (MA incorporating PG Cert and PG Dip)
- Education: Guidance Studies (MA incorporating PG Cert and PG Dip)
- Environmental Health (MSc)
- Environmental Management (MSc incorporating PG Cert and PG Dip)
- Ergonomics (MSc incorporating PG Cert and PG Dip)
- Events Management (FdA)
- Hairdressing and Salon Management (Management/Creative Pathways) (FdA)
- Hairdressing and Salon Management (Top Up) (BA Hons)
- Hospitality Management Top Up (BA Hons)
- Hotel Management (FdA)
- International Spa Management (BSc Hons)
- Law (LLM)
- MBA (incorporating PG Cert and PG Dip)
- Nursing Studies (Adult – Top Up) (BSc Hons)
- Nursing Studies (Mental Health – Top Up) (BSc Hons)
- Psychology (BSc Hons)
- Spa (Management/Therapies Pathways) (FdA)
- Strategic Management (MSc incorporating PG Cert and PG Dip)  

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29 University of Derby. http://www.derby.ac.uk/
31 “Courses.” University of Derby. http://www.derby.ac.uk/online/courses?edu_viewFullList=1
University of Maryland – University College

The University of Maryland – University College (UMUC) is one of 11 degree-granting institutions within the University System of Maryland. UMUC offers educational services both in traditional classrooms and through online, distance delivery formats. Students may choose from classroom sites throughout Maryland, Virginia, and Washington D.C., as well as at hundreds of military bases overseas. Students who are unable to access a physical classroom may complete a degree or certificate program through UMUC’s online learning platform, WebTYCHO. Figure 4 demonstrates global enrolment trends for UMUC between 2004 and 2009.

Figure 4: Total Worldwide Enrolment at UMUC, Fall 2000 to Fall 2009

Table 5 demonstrates undergraduate and graduate enrolment, by full-time and part-time status, for UMUC’s stateside population, Asian division, European division, and overall enrolment. Overall, UMUC had over 50,000 students enrolled in its online courses in 2009, most of them from the United States.

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32 University of Maryland University College. http://www.umuc.edu/index.shtml
Table 5: Fall 2009 Worldwide Headcount

<table>
<thead>
<tr>
<th></th>
<th>Full-Time</th>
<th>Part-Time</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stateside</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td>3,408</td>
<td>20,876</td>
<td>24,284</td>
</tr>
<tr>
<td>Graduate</td>
<td>270</td>
<td>12,793</td>
<td>13,063</td>
</tr>
<tr>
<td>Stateside Total</td>
<td>3,678</td>
<td>33,669</td>
<td>37,347</td>
</tr>
<tr>
<td><strong>Asian Division</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td>2,135</td>
<td>3,353</td>
<td>5,488</td>
</tr>
<tr>
<td>Graduate</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Division Total</td>
<td>2,135</td>
<td>3,353</td>
<td>5,488</td>
</tr>
<tr>
<td><strong>European Division</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td>3,202</td>
<td>4,912</td>
<td>8,114</td>
</tr>
<tr>
<td>Graduate</td>
<td>13</td>
<td>51</td>
<td>64</td>
</tr>
<tr>
<td>Division Total</td>
<td>3,215</td>
<td>4,963</td>
<td>8,178</td>
</tr>
<tr>
<td><strong>Worldwide</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td>8,745</td>
<td>29,141</td>
<td>37,886</td>
</tr>
<tr>
<td>Graduate</td>
<td>283</td>
<td>12,844</td>
<td>13,127</td>
</tr>
<tr>
<td>Worldwide Total</td>
<td>9,028</td>
<td>41,985</td>
<td>51,013</td>
</tr>
</tbody>
</table>

Source: University of Maryland University College

Figure 5 demonstrates that the majority of students enrolled in UMUC are employed full-time while taking online courses. Only a small percentage are not employed and also not seeking employment, most likely representing the small percentage of students enrolled full-time.

Figure 5: UMUC Stateside Student Employment Status, 2009

Source: University of Maryland University College

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35 Ibid., 2.
36 Ibid., 5.
Table 6 lists the proportion of females for each category of students. According to UMUC’s data, more than half of stateside learners are female, while only a quarter of graduate students in Europe are females.

Table 6: Percent Female Enrolment, Fall 2009

<table>
<thead>
<tr>
<th>Division</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stateside</td>
<td>55.9%</td>
<td>56.1%</td>
<td>56.0%</td>
</tr>
<tr>
<td>Asia</td>
<td>43.4%</td>
<td>--</td>
<td>43.4%</td>
</tr>
<tr>
<td>Europe</td>
<td>45.6%</td>
<td>26.6%</td>
<td>45.5%</td>
</tr>
<tr>
<td>Worldwide</td>
<td>51.9%</td>
<td>56.0%</td>
<td>52.9%</td>
</tr>
</tbody>
</table>

Source: University of Maryland University College

The final data table demonstrates the age breakdown and median age for students enrolled in different kinds of programs at UMUC. Overall, the vast majority of online learners are between the ages of 25 and 49, demonstrating that UMUC’s target population is much older than traditional college students.

Table 7: Student Age Breakdown and Median Age, 2009

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Undergraduate: Full-Time</th>
<th>Undergraduate: Part-Time</th>
<th>Graduate: Full-Time</th>
<th>Graduate: Part-Time</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>21 and under</td>
<td>12.9%</td>
<td>4.5%</td>
<td>0.0%</td>
<td>0.1%</td>
<td>3.7%</td>
</tr>
<tr>
<td>22-24</td>
<td>22.9%</td>
<td>10.5%</td>
<td>12.2%</td>
<td>6.3%</td>
<td>10.2%</td>
</tr>
<tr>
<td>25-29</td>
<td>27.9%</td>
<td>23.9%</td>
<td>32.2%</td>
<td>24.6%</td>
<td>24.6%</td>
</tr>
<tr>
<td>30-34</td>
<td>16.7%</td>
<td>19.2%</td>
<td>22.6%</td>
<td>20.4%</td>
<td>19.4%</td>
</tr>
<tr>
<td>35-39</td>
<td>9.1%</td>
<td>15.2%</td>
<td>12.6%</td>
<td>16.8%</td>
<td>15.2%</td>
</tr>
<tr>
<td>40-49</td>
<td>8.5%</td>
<td>19.7%</td>
<td>16.7%</td>
<td>22.7%</td>
<td>19.7%</td>
</tr>
<tr>
<td>50 and over</td>
<td>2.1%</td>
<td>7.0%</td>
<td>3.2%</td>
<td>9.1%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Median</td>
<td>27</td>
<td>32</td>
<td>30</td>
<td>34</td>
<td>28 (FT)</td>
</tr>
</tbody>
</table>

Source: University of Maryland University College

UMUC offers online programs toward undergraduate certificates, bachelor’s degrees, and master’s degrees, plus a Doctor of Management. The following programs are offered entirely online:

Undergraduate Certificates:
- Accounting – Introductory
- Accounting – Advanced
- Business Project Management
- Financial Management
- Information Assurance
- Internet Technologies
- Object Oriented Design and Programming
- Project Management for IT Professionals

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37 Ibid., 7.
38 Ibid., 9-10.
39 “Online Degrees and Certificates.” University of Maryland University College. http://umuc.edu/online_ed.shtml
- Human Resource Management
- Management Foundations
- Workplace Communications

- Workplace Spanish
- Computer Networking
- Database Design and Implementation
- Database Management
- Game Development

**Bachelor’s Degrees:**

- Accounting
- Asian Studies
- Business Administration
- Communication Studies
- Computer and Information Science
- Computer and Information Technology
- Computer Science
- Computer Studies
- Criminal Justice
- Cybersecurity
- Emergency Management
- English
- Environmental Management
- Finance

**Master’s Degrees:**

- Accounting and Finance
- Acquisition and Supply Chain Management
- Biotechnology
- Business Administration
- Criminal Justice
- Cybersecurity
- Distance Education
- Education

- E-Business
- Emergency Management
- Environmental Management
- Finance

- Visual Basic Programming
- Paralegal Studies
- Applied Behavioral and Social Sciences
- Clinical Mental Health Care
- Diversity Awareness
- Health Issues for the Aging Adult
- Human Resource Development

- Fire Studies
- Gerontology
- Global Business and Public Policy
- History
- Homeland Security
- Human Resource Management

- Information Forensics
- Legal Studies
- Management Studies
- Marketing
- Political Science
- Psychology
- Social Science

- Health Care
- Homeland Security and Information Assurance
- Human Resource Management
- Information Technology
- International Management
- Management
- Marketing and Public Relations
- Nonprofit and Association Management
- Public Relations
- Software Engineering
- Technology Management
- Telecommunications Management
**Drexel University Online**

Based in Philadelphia, Pennsylvania, Drexel University’s e-learning subsidiary is known as Drexel University Online (DUO). DUO received the 2010 Sloan Consortium Award for “Excellence in Institution-Wide Online Education,” specifically “For developing and delivering a premier university-wide initiative at Drexel University that is characterized by exceptional quality, scale, and breadth.” The online enrollment has grown from “just a handful” in 2002 to around 7,000 last year. Online learners come from all 50 states and multiple countries.

DUO has two separate campaigns aimed at specific markets aside from traditional online learners. **Drexel Pro** allows working professionals to learn online at reduced tuition rates and with support from their employers. This employer partnership program currently works with over 250 organizations all over the country in a variety of industries, including engineering, healthcare, business, public health, clinical research, technology, and education. DUO also provides tuition-free education to active and veteran military personnel through its **Military Education** program. This program is specifically “tailored for the military lifestyle” with 10-week terms that start four times per year.

DUO’s online programs are offered at the master’s degree, bachelor’s degree, and certificate level. A full listing is provided below:

**Online Bachelor’s Degrees:**

- Health Services Administration
- RN-to-BSN
- Business Administration
- Communication
- Communications and Applied Technology
- Criminal Justice
- Education
- General Studies
- Property Management
- Computing and Security Technology
- Information Systems (BS and BS/MS)
- Information Technology (BS and BS/MS)

**Online Master’s Degrees:**

- Post-Professional (Nursing and Health MHS)
- Library and Information Science

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40 Drexel University Online. http://www.drexel.com/
Adult Acute Care Nurse Practitioner
Adult Psychiatric Mental Health Nurse Practitioner
Clinical Trials Research
Nursing Education & Faculty Role
Women’s Health Nurse Practitioner
Innovation and Intra/Entrepreneurship in Advanced Nursing Practice
Nursing Leadership in Health Systems Management
RN-MSN Bridge Program
Clinical Research Organization and Management
Clinical Research for Health Professions
Business Administration
Pharmaceutical Management
Human Resource Development
Sport Management
Arts Administration
Hospitality Management
Communication

Information Studies and Technology (Advanced Certificate)
Electrical Engineering
Engineering Management
Engineering Technology
Computer Science
Software Engineering
Mathematics Learning and Teaching
Learning Technologies
Teaching, Learning and Curriculum
Educational Administration: Collaborative Leadership
Global and International Education
Higher Education
Special Education
Construction Management
Project Management
Property Management
Professional Studies – Creative Studies, E-Learning Leadership, or Homeland Security Management

In addition to the above degree programs, over 40 certificates are offered in the following areas:

Nursing and Health Professions
Professional Studies
Clinical Research
Engineering
Education – K-12, Teacher Certification, and Higher Education
Hospitality Management
Information Science/Systems
Public Health
Section Three: Global Key Players in Distance Learning

In this section we review global key players in distance learning. We begin with an overview of “mega universities” and follow with profiles of selected global key players.

Overview of Mega Universities

A mega university is defined as “a distance teaching institution with over 100,000 active students in degree-level courses.” These large-scale institutions are increasingly becoming “very important for the future of higher education all over the world.” Our best estimate of current enrolment figures for these key players is provided by a 2004 survey of mega universities’ quality assurance conducted by Insung Jung of the International Christian University in Japan. The estimated enrolments for respondent institutions, along with staffing figures, are shown in Table 8.

Table 8: Profiles of the Nine Mega Universities Participating in the Survey

<table>
<thead>
<tr>
<th>Institution</th>
<th>Year Established</th>
<th># Distance Education Students</th>
<th># Academic Staff</th>
<th># Administrative Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Full-Time</td>
<td>Part-Time</td>
</tr>
<tr>
<td>AIOU (Pakistan)</td>
<td>1974</td>
<td>456,126</td>
<td>145</td>
<td>23,000 (tutors)</td>
</tr>
<tr>
<td>Anadolu (Turkey)</td>
<td>1958</td>
<td>884,081</td>
<td>1,729</td>
<td>653 (tutors) 300 (lecturers)</td>
</tr>
<tr>
<td>CCRTVU (China)</td>
<td>1979</td>
<td>2,300,000</td>
<td>52,600</td>
<td>31,500 (tutors)</td>
</tr>
<tr>
<td>IGNOU (India)</td>
<td>1985</td>
<td>1,013,631</td>
<td>339</td>
<td>35</td>
</tr>
<tr>
<td>KNOU (Korea)</td>
<td>1972</td>
<td>186,402</td>
<td>271</td>
<td>108 (tutors)</td>
</tr>
<tr>
<td>OU (UK)</td>
<td>1969</td>
<td>203,744</td>
<td>1,169</td>
<td>7,995 (Associate lecturers)</td>
</tr>
<tr>
<td>SHTVU (China)</td>
<td>1960</td>
<td>101,218</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>STOU (Thailand)</td>
<td>1978</td>
<td>181,372</td>
<td>375</td>
<td>--</td>
</tr>
<tr>
<td>UT (Indonesia)</td>
<td>1984</td>
<td>222,068</td>
<td>762</td>
<td>3,600 (tutors)</td>
</tr>
</tbody>
</table>

Source: Lifelong Learning & Distance Higher Education


47 Ibid., 81.
Profiles: Global Key Players

Universitas Terbuka (Indonesia Open University)\textsuperscript{48}

A 2006 report claimed that over 95 percent of the 340,000 enrolled students at Universitas Terbuka (UT) were working adults.\textsuperscript{49} As of 2009, an estimated 550,000 students were enrolled.\textsuperscript{50} Overall, UT has given over one million people the opportunity to access higher education and has contributed significantly to the country’s efforts to upgrade teachers qualifications.\textsuperscript{51} The University was founded with the aim of:

- Providing ample opportunity for Indonesian citizens and foreign citizens, wherever their home, to higher education;
- Providing higher education services for those, who because of work or any other reason, unable to continue their education at colleges face to face;
- Developing academic and professional education programs in accordance with the real needs of development that have not been developed by other universities.

UT’s open learning includes little prerequisites: the only requirement is a secondary education. Courses are delivered through online portals, televised lectures, radio broadcasts, etc. as well as print resources, and the curriculum is designed for independent study. UT has a complete, traditional library completely online.

UT comprises four faculties plus one graduate school:

- Faculty of Teacher Training and Education Science
- Faculty of Mathematics and Natural Science
- Faculty of Social and Political Science
- Faculty of Economics
- Graduate School

The following academic programs are currently offered:

Bachelor’s Degrees:

- Indonesian and Literature Education
- English Education

\textsuperscript{48} Universitas Terbuka. http://www.ut.ac.id/english.html
Mathematics Education
Chemistry Education
Economics Education
Primary School Teacher Education
Public Administration
Government Studies
Sociology
Economics Development
Accounting
Statistics
Agribusiness, Majoring in Agricultural Extension and Communication/Animal Husbandry/Fishery

Physics Education
Biology Education
Civics Education
Early Childhood Education Teacher
Business Administration
Communication Science
English Translation
Management
Mathematics
Biology

Food Technology and Science

Master’s Degrees:

Administration Science, majoring in Public Administration
Management
Marine Science, majoring in Fishery Management
Mathematics Education

Certificate Programs:

Indonesian for Foreigners
Public Administration of District Area

Indira Gandhi National Open University (IGNOU)\(^{52}\)

Indira Gandhi National Open University (IGNOU) currently offers 338 programs of study through over 3,500 courses leading toward doctorate, masters, bachelors, post-graduate, and under-graduate diplomas and certificate programs. The University has established a network of 43 Regional Centers (RCs), six Sub-Regional Centers and 1,400 Study Centers (SCs) throughout India to provide easy access and effective support services to its learners.

IGNOU has experienced tremendous growth in the past 18 years: enrolment grew from 4,528 when it opened in 1987 to 366,161 in 2004, representing a total

\(^{52}\) IGNOU: The People’s University. www.ignou.ac.in/ignou
“registered growth rate” of 7,986 percent and an average annual growth rate of 443 percent. Figure 6 illustrates the growth in enrolment of online learners up to 2004.

**Figure 6: Growth in Enrolment at IGNOU, 1987 to 2004**

Source: AAOU Journal

IGNOU’s outreach extends beyond the borders of the country: the University entered into bilateral and multilateral alliances with several countries, especially in Asia and Africa, including Australia, United Kingdom, France, United Arab Emirates, Qatar, Kuwait, Oman, Bahrain, Abu Dhabi, Seychelles, Mauritius, Maldives, Ethiopia, Madagascar, Papua New Guinea and Liberia. **IGNOU intends to establish collaboration and partnership with government agencies and other open universities through international organizations** like UNESCO, the Commonwealth Secretariat, the Commonwealth of Learning (COL), the World Health Organization (WHO) and the World Wide Fund (WWF).

IGNOU’s online programs are facilitated through audio, video, radio, television, interactive radio and video counseling, as well as teleconferencing. The University also runs a 24-hour educational TV channel called Gyan Darshan in collaboration with other institutions of higher learning.

IGNOU offers online programs through the following schools:

- School of Agriculture
- School of Education

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54 Ibid., 47.
UNISA is a dedicated, open distance learning institution accessible to all learners, specifically those on the African continent. The University aims to address the needs of a diverse student profile by offering relevant learner support, facilitated by appropriate information and communications technology. Traditionally, UNISA’s main target market has been adults, but now it attracts a growing number of young people aged 24 and younger. Geographically, South Africa continues to be the main source of registrations, but UNISA is attracting growing numbers of students from outside the country’s borders. In the 2005 academic year, more than 17,000 UNISA students, or 8 percent, were from outside South Africa, mostly from Zimbabwe, Namibia, Mauritius, Botswana, Kenya and Swaziland. Outside Africa, the United Kingdom represents UNISA’s biggest target market, with around 1,600 registrations in 2005. The total enrolment was estimated to be roughly 265,000 in 2008.

UNISA offers the following colleges and institutes:

- College of Agriculture and Environmental Sciences
- College of Economic and Management Sciences
- College of Human Sciences
- College of Law
- College of Science, Engineering and Technology

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55 University of South Africa. http://www.unisa.ac.za/
- Graduate School of Business Leadership
- Institute for African Renaissance Studies
- Institute for Science and Technology Education
- Thabo Mbeki African Leadership Institute
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