Distance Learning and Global Demand

Neil Kemp

Abstract
Are international students losing their appetite for distance learning (DL) degrees? Recent poor growth in global enrollments does seem counterintuitive, given previous predictions that suggested a future where information technology and MOOCs would enhance outreach, offer greater student choice, and result in new enrollments. Is this a short-term pattern or evidence of a long-term trend? (In this paper, DL refers only to programs in which a full degree program, not parts, are followed through DL arrangements.)

International enrollments to UK distance learning (DL) degrees have stagnated over the last five years—and this, as many universities have sought to expand recruitment. Recent data indicates that 120,000 students living outside the United Kingdom were enrolled in UK DL degrees. This is the same level as five years ago and, without three UK universities establishing significant new DL partnerships, there would have been an 11 percent decline.

Universities had viewed developing DL delivery as a means to grow global enrollments, and the UK government, seeking to cut immigration, was keen to divert universities away from recruitment to UK campuses. Some UK universities have achieved growth through adopting innovative and focused approaches. For instance, the University of Edinburgh offers a suite of online master degrees; the University of Salford and the University of South Wales have established new European partnerships; and the University of the West of Scotland has achieved similar results in India. Significantly, partnerships can be vital, for a strong local partner can support teaching, marketing, and recruitment.

Where Are the Students Located?
UK DL degrees are delivered in over 200 countries, with most enrollments reported in those with historic UK ties—Canada, Cyprus, Hong Kong (SAR), Pakistan, Singapore, and the United States. These contrast directly with recruitment to UK campuses, where China, India, Germany, and some other EU countries are among the top ten.

Demand is thinly spread across many countries and this is a challenge; 104 countries each have fewer than 100 UK enrollments. In others, a handful of universities dominate: In Cyprus one UK university accounts for 95 percent, and in Pakistan one contributes 87 percent of enrollments.

Global Providers
An estimate, based on the limited data available, suggests that possibly 400,000 students internationally follow DL degrees in English, the main provider countries being the United Kingdom, the United States, Australia, India, Canada, New Zealand, and South Africa. Australian offshore enrollments totalled 7,390 in 2017, but this was a 5 percent decline over the previous year. A further 6,850 students were following mixed mode delivery programs. US data (2018) indicates that there were 42,600 enrollments located outside the United States, a growth of 5 percent per year. This total would seem modest by comparison with UK enrollments, given the 3 million US students enrolled in full DL degrees,

NUMBER **103**_SUMMER **2020**

and 6 million campus-based US students following some course modules online. Will the number of DL programs already available domestically in the United States provide a springboard for international growth?

Size Does Matter

Is there an optimal size for academic and financial appropriateness? Patterns are revealing: In the United Kingdom, nearly half of the international DL students were enrolled in 2018–2019 by just three of the over 100 UK universities delivering internationally. One third of universities reported less than 100 students each. Distribution is skewed and, although the detailed picture is more nuanced, the low numbers suggest that many universities might be struggling to achieve viability.

Skewed distributions are also apparent in Australia and the United States. The majority of the 1,100 US institutions reporting DL enrollments (2018) had less than 100 non-US students, with just seven universities accounting for 40 percent of all international enrollments. In Australia, only one institution reported over 1,000 enrollments and just five of 56 providers enrolled over 500; again, most institutions had less than 100. Low enrollments mean low revenues and ultimately that a university is probably not covering development and delivery costs. Further, the pricing of DL programs appears haphazard. For example, DL-delivered MBA fees from UK public universities vary from £8,000 to over £40,000.

The above suggests that there will likely be rationalization of provision, driven particularly by financial concerns, resulting in fewer universities offering DL degree programs.

MOOC patterns

Over 120 million students have registered in MOOC programs over the past 10 years; while this is a success, the rate of increase is slowing.

Over 120 million students have registered in MOOC programs over the past 10 years; while this is a success, the rate of increase is slowing. Fifty MOOC-based degrees are available globally, but total enrollments are probably a little over 20,000, with Georgia Institute of Technology's MS in computing accounting for over half of these. Price and prestige are both key factors in recruitment, and Georgia Tech meets both criteria: a high global ranking and a fee for the full MS of just US$9,000. (Master degrees in computing from less prestigious institutions typically cost over US$15,000.)

However, most MOOC students only follow a module or two, with completion rates just 3 percent. Their motivations are various: leisure, specialist interest, and perhaps the prestige of saying that they have "studied" a Harvard or MIT program.

Opportunities and Challenges

Globally, 400,000 DL enrollments seem modest by comparison with internationally mobile students (more than 25 million per year)—but is growth possible? The original reasons for optimism for DL remain strong, as they can offer greater student choice; provide quality assured international degrees and professional accreditations; are delivered flexibly to fit around employment and family; through economies of scale; and with opportunities for the disadvantaged and discriminated, wherever they live. Essentially: education anytime, anyhow, anywhere, and (almost) for anyone.

But challenges remain: cultural bias, with on-campus programs strongly preferred; lack of national recognition of (foreign) DL degrees; bogus operators undermining reputation; high fees; and new in-country provision addressing local demand.

However, globally the appetite for learning seems inexhaustible, and imaginative approaches will continue to evolve. DL offers another route that can both sit alongside, and be integrated with, campus-based degrees. Universities seeking to be involved need clarity of their motivation, with DL integrated within their international strategy and informed by global demand. It requires long-term commitment and investment (think 10 years); prioritizing of markets; developing relevant programs and delivery modes; offering specialist topics with professional recognition; growing international partnerships that leverage from the strengths of both partners; and dovetailing DL and campus-based programs to enhance student transferability. Perseverance, understanding, and patience are extremely valuable assets.

COVID-19

At the time of writing, the situation remains fast moving, but one response has seen many universities adopting online teaching solutions. Will this be short-lived or will it result in attitudinal changes in universities and among potential students? Most previous student surveys have shown a strong preference for a campus experience over DL degree delivery. The motivating factors for a campus experience appear challenging to replicate online, for they imply face-to-face interaction: student–teacher, student–student, and student–employer. However, what might now change will be more parts of a program offered online—as already seen in the United States over recent years.

Neil Kemp OBE is an international higher education consultant and board member of the Council for Education in the Commonwealth. E-mail: neil.kemp@nkeducation.com.