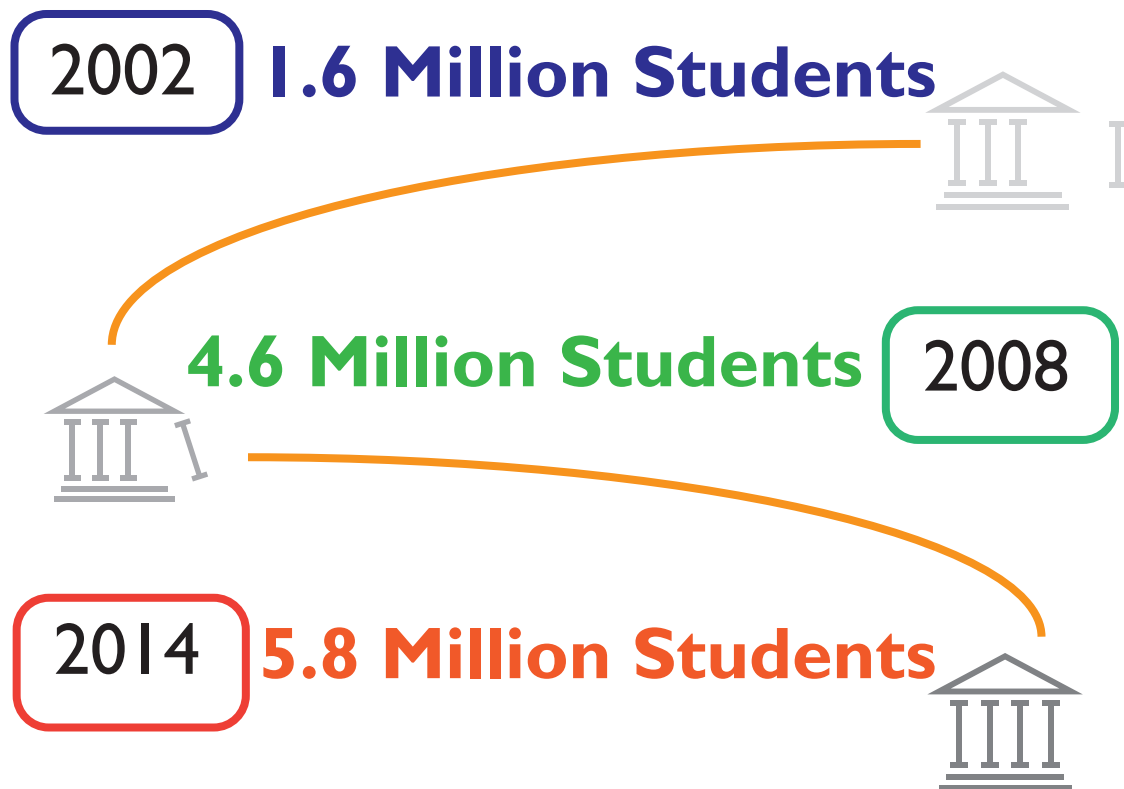


WCET Distance Education Enrollment Report 2016

Utilizing U.S. Department of Education Data

Taking at Least One Distance Course...



*Distance Education is No Longer
an Institutional Accessory*

About WCET

The WICHE Cooperative for Educational Technologies (WCET) is the leader in the practice, policy, and advocacy of technology-enhanced learning in higher education. WCET is an unbiased, trusted and dynamic source of effective practices, policy analysis, advocacy, and expertise in areas related to leveraging learning technologies to support institutional effectiveness and student success. Connect with WCET - wcet.wiche.edu.

Authors

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Terri Taylor Straut is an experienced elearning project manager and administrator. As the founding director of CU Online and a member of the founding management team of the Western Governors University (WGU), Terri has been a part of the online/distance learning industry since its infancy in the mid-1990s. In addition to her experience in higher education, Terri has implemented Distance Education projects for corporations and the non-profit sector. Since IPEDS released the Fall 2012 Distance Education data, Terri has partnered with Russ Poulin to analyze and report the IPEDS Distance Education results.

Our Partner: Babson Survey Research Group

Thank you to Jeff Seaman, Babson Survey Research Group (BSRG), for partnering with WCET on this year's report. We pooled resources to create a data set of institutional responses that improved on our separate work from previous years. Highlights of this report are included in Babson's *Online Report Card: Tracking Online Education in the United States*. Obtain that report at: <http://www.onlinelearningsurvey.com/>.

BSRG is a survey design, implementation, and analysis group within the Arthur M. Blank Center for Entrepreneurship at Babson College. BSRG has been conducting research and publishing annual reports on online education in U.S. higher education for thirteen years. The series has had a major impact on the academic community with regular coverage in U.S. academic publications such as the *Chronicle of Higher Education* and *Inside Higher Ed*. The total downloads for the series now number more than one million.

Acknowledgements

Thank you to WCET's State Authorization Network (SAN) for providing some of the financial support for this analysis. Working collaboratively, SAN members navigate state regulatory processes more efficiently than working on their own. The IPEDS data on out-of-state students is of great interest to SAN members. Learn about SAN at: <http://wcet.wiche.edu/initiatives/state-authorization-network>

Thank you to Phil Hill, *e-Literate* blog and Mindwires Consulting, for his assistance in the past in developing a useful dataset and conducting thoughtful analyses. Thank you to Cali Morrison, WCET, for her artistic eye in shaping the final report and her assistance in publicizing the final product. Finally, thank you to the National Center for Education Statistics and IPEDS for continuing to report this much-needed data.

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Executive Summary

Over the past few years, Distance Education enrollments grew each year, even as overall higher education enrollments have declined. Even so, the overall Distance Education enrollment numbers do not tell the whole story. Based on data accumulated by the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS) surveys from the Fall of 2014, this report highlights differences by sector, graduate vs. undergraduate study, student location, and by the number of institutions educating students at a distance. Our aim is to enlighten readers about the current state of the industry through graphs, data tables, observations, and commentary based on our insights.

Distance Education Categories

Based upon IPEDS processes, enrollments are divided into three categories:

- ***"Exclusively" Distance Education:*** All of the student's enrollments for the term were through Distance Education courses.
- ***"Some But Not All" Distance Education:*** The student enrolled in a mix of course modalities, including some Distance Education courses.
- ***"At Least One" Distance Education Course:*** The sum of the above two categories.

Distance Education is a Key Component of Higher Education in the United States

Enrollment in Distance Education courses represents a significant amount of higher education activity in the Fall of 2014.

- One-in-seven (14%) of all higher education students took all of their courses "Exclusively" at a distance.
- One-in-seven (14%) of all higher education students took "Some But Not All" of their courses at a distance.
- More than one in four students (28%) enrolled in "At Least One" of their courses at a distance in the Fall of 2014.



Distance Education Grows While Overall Enrollment Dips

For a time, Distance Education experienced double-digit growth each year. While those days are gone, it is still impressive that Distance Education continues to grow while overall higher education enrollment declines.

- Overall higher education enrollment fell by 2% from 2012 to 2014.

- Distance Education enrollments grew by 7% for those taking "At Least One" and rose by 9% for those enrolled "Exclusively" at a distance.

Overcoming the Myth that Distance Education is Only for For-profit Institutions

We encounter policy-makers, members of the press, and higher education pundits who equate distance learning with for-profits, but the bulk of the activity is in other sectors:

- For-profit institutions accounted for slightly less than one-third (30%) of "Exclusively" distance enrollments, while public institutions accounted for almost half (48%) of those who took all their courses at a distance.
- Public institutions accounted for the vast majority (85%) of "Some But Not All" distance enrollments in 2014.
- The for-profit sector almost fell to being the sector with the fewest distance enrollments. This is a remarkable outcome considering the for-profit sector led the private, non-profit sector by more than one-quarter million (297,521) enrollments in 2012. In 2014, that difference fell to only 422 enrollments.

Growth Differs Greatly by Sector

Growth for "Exclusively" Distance Education enrollments for all sectors combined was only 9% from 2012-2014, but each sector fared very differently:

- Non-profit enrollments grew by 33% (158,541 students) and public enrollments by 12% (151,056 students).
- Meanwhile, for-profit enrollments dropped by 9% (84,320 students).

Identifying the Location of Distance Students Continues to Be a Problem

The survey asks for the location of the student, which is interesting both from analyzing geographic reach of institutions, but also compliance with state authorization regulations.

- For public institutions, 84% of their "Exclusively" distance students reside in the same state as the institution. A minority of students reside in the same state for the other sectors (37% for non-profit and 15% for for-profit institutions).
- There was a large increase (66%) in the "Student Location Unknown/Not Reported" category and a decrease (14%) in students reported in the "In U.S., State Unknown" category. The increase may be mostly due to a few large institutions that changed their reporting.

A FINAL NOTE: While MOOCs (Massively Open Online Course) received lots of buzz in the last few years, their enrollments are rarely included in IPEDS counts because most of their offerings are currently not-for-credit.

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Introduction

Purpose of this Report

The purpose of this Report is to provide summaries and analysis of the Distance Education data from the U.S. Department of Education's IPEDS Fall Enrollment 2014 survey. The Report also discerns trends by comparing the Fall 2014 data to previous years' data, primarily the Fall 2012 Distance Education data.

What is IPEDS?

The Integrated Postsecondary Education Data System (IPEDS)¹ is a national survey of postsecondary institutions in the United States, which is conducted by the U.S. Department of Education's National Center for Educational Statistics (NCES)². IPEDS represents the most comprehensive data reported by all Title IV (federal financial aid) eligible institutions. Through the IPEDS Data Center, individuals can download data files for one or more institutions with information from any of the IPEDS components or download complete data files, produce reports, or create group statistics.

The focus of this report is the Distance Education data which has been collected by IPEDS for the Fall 2012, Fall 2013, and Fall 2014 terms. IPEDS reporting includes a number of other variables that describe the size, sector, and focus of each institution of higher education. This data allows us to compare institutions using a consistent set of expectations provided by the IPEDS survey.

Definitions

Distance Education (DE). According to IPEDS³, Distance Education is:

“Education that uses one or more technologies to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor synchronously or asynchronously.

Technologies used for instruction may include the following: Internet; one-way and two-way transmissions through open broadcasts, closed circuit, cable, microwave, broadband lines, fiber optics, satellite or wireless communication devices; audio conferencing; and video cassette, DVDs, and CD-ROMs, if the cassette, DVDs, and CD-ROMs are used in a course in conjunction with the technologies listed above.”

¹ <http://nces.ed.gov/ipeds/datacenter/>

² <https://nces.ed.gov>

³ <https://nces.ed.gov/ipeds/glossary/?charindex=D>

Distance Education Course. According to IPEDS⁴:

"A course in which the instructional content is delivered exclusively via distance education. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education."

Distance Education categories: IPEDS collects Distance Education enrollments in two categories (the first two listed below) and this Report adds a third:

- **"Exclusively" Distance Education:** All of the student's enrollments for the term were through Distance Education courses.
- **"Some But Not All" Distance Education:** The student enrolled in a mix of course modalities, including some Distance Education courses.
- **"At Least One" Distance Education Course:** WCET created this category as the sum of the above two categories. This category matches the historical data reported by the Babson Survey Research Group⁵ (BSRG)/Sloan-C (now Online Learning Consortium)/Pearson survey. Prior to IPEDS reporting of Distance Education data starting with the Fall of 2012, the BSRG survey was the defacto data available. Therefore, historic comparisons require this compiled category. *e-Literate* author and blogger Phil Hill is responsible for early analysis of the Fall 2012 IPEDS data and collaboration with BSRG to ensure that the two data sets can be compared appropriately. Phil has partnered with WCET in illuminating the differences in the data⁶ and definitions used.

Fall Enrollment. According to IPEDS⁷:

"This annual component of IPEDS collects data on the number of students enrolled in the fall at postsecondary institutions. Students reported are those enrolled in courses creditable toward a degree or other formal award, students enrolled in courses that are part of a vocational or occupational program, including those enrolled in off-campus or extension centers, and high school students taking regular college courses for credit, institutions..."

⁴ <https://nces.ed.gov/ipeds/glossary/?charindex=D>

⁵ Babson Survey Research Group: <http://www.babson.edu/Academics/faculty/provost/Pages/babson-survey-research-group.aspx>

⁶ *e-Literate* Blog: "New IPEDS Data: Profile of Online Education in US/Fall 2012" <http://mfeldstein.com/new-ipeds-data-profile-online-education-us-fall-2012/>

⁷ <https://nces.ed.gov/ipeds/glossary/?charindex=F>

Possible Shortcomings of Data Reporting by Institutions

Beginning with the first release of IPEDS Distance Education enrollments, Russ Poulin (WCET) and Phil Hill (*e-Literate* Blog and Mindwires Consulting) have reported problems⁸ and anomalies when colleges reported their data. Issues included:

- Confusion about IPEDS' definition of Distance Education, as it is slightly different than those used by some state oversight agencies or accrediting agencies. Since the IPEDS definition is stricter, this may have created an over count.
- Confusion about what courses offered at a distance needed to be included in the count. For example, some institutions admitted that they had never reported credit courses offered through their self-supported, continuing education programs even though the Department expects those enrollments to be reported. This created an undercount for these institutions.
- Student data systems capturing course starts only through a particular date in the fall. All other enrollments were counted in the spring. This created an undercount for some institutions using multiple start times or courses of varying length.

The results of these issues is that the Distance Education data reported could result in over counts for some colleges and undercounts in others. Despite these problems, all institutions issuing federal financial aid are required to submit IPEDS surveys and this results in the most comprehensive data collection currently available.

A recent blog post ("The Fuzzy Math of Online Learning Enrollments"⁹) by Jon Becker of Virginia Commonwealth University highlights one institution's issues with varying definitions. State, accrediting agencies, and IPEDS have different views of what counts as distance education. One of his concluding hopes is that: "More people involved in these issues need to be writing and talking about this, if only to generate conversations that might reach stakeholders and policymakers who don't yet understand the nuances of online learning." We agree.

In 2014, Phil Hill and us¹⁰ said that the "Fall 2012 Distance Education reported enrollments create a very unstable base for comparisons." That is still a valid concern. If those institutions continued their practices, then the results are oddly stable, but still incorrect. If those institutions changed their practices then the trends are more difficult to decipher.

We use the data that is available to us, but repeat the caveats that we raised in 2014 and Jon Becker highlights in 2016.

⁸ WCET *Frontiers* Blog: "Education Department Urges Colleges to Follow IPEDS Distance Ed Definitions"
<https://wcetblog.wordpress.com/2014/10/17/follow-ipeds-dist-ed-definitions/>

⁹ <http://www.jonbecker.net/the-fuzzy-math-of-online-learning-enrollments/>

¹⁰ WCET *Frontiers* Blog: "Investigation of IPEDS Distance Education Data: System Not Ready for Modern Trends"
<https://wcetblog.wordpress.com/2014/09/25/ipeds/>

Previous WCET work on IPEDS Distance Education Data

WCET has analyzed the Distance Education data reported to IPEDS since it first became available. Previous findings have been reported through the WCET *Frontiers* Blog.

Fall 2012 Data Blogs:

"U.S. Distance Education Adoption by the Numbers: an IPEDS Reality Check" - <https://wcetblog.wordpress.com/2014/03/05/ipeds-reality-check/>

"Where in the World Are Our Distance Education Students?: IPEDS Reality Check" - <https://wcetblog.wordpress.com/2014/03/07/ipeds-where-in-the-world/>

"Colleges Crossing Borders—Counts and State Authorization: IPEDS Reality Check" - <https://wcetblog.wordpress.com/2014/03/11/ipeds-institutions-stateauth/>

Fall 2013 Data Blogs:

"IPEDS Fall 2013: Higher Ed Sectors Vary Greatly in Distance Ed Enrollments" - <https://wcetblog.wordpress.com/2015/03/05/ipedssectors/>

"IPEDS Fall 2013: Distance Education Data Reveals More Than Overall Flat Growth" - <https://wcetblog.wordpress.com/2015/03/10/ipedsenrollments/>

"IPEDS Fall 2013: Less than Half of Fully Distant Students Come from Other States" - <https://wcetblog.wordpress.com/2015/03/12/ipedsstateenrollments/>

"Busting the Myth: Distance Education Enrollment Infographic" - <http://wcet.wiche.edu/initiatives/research/busting-the-myth-distance-education>

2014 Data Blog:

"Highlights of Distance Education Enrollment Trends from IPEDS Fall 2014" - <https://wcetblog.wordpress.com/2015/12/21/ipeds-fall-2014-de-highlights/>

Russ Poulin and Terri Straut (WCET) partnered with Phil Hill (*e-Literate* blog) to investigate the nature of data reporting anomalies. WCET also conducted a non-scientific canvassing of a sample of colleges and universities whose IPEDS Distance Education reporting seemed incongruous with their size or Distance Education operations. This research resulted in the identification of a number of ways that institutions IPEDS reporting regarding Distance Education was inaccurate:

"Investigation of IPEDS Distance Education Data: Systems Not Ready for Modern Trends"¹¹ and was reported by *Inside Higher Ed*¹².

In addition to blog posts reporting the data analysis, WCET held a conversation with the U.S. Department of Education's IPEDS personnel. We clarified the definitions used in IPEDS and explored issues related to possible undercounts and over counts of the Distance Education data"¹³.

Methodology

The data reported came from the IPEDS Fall Enrollment surveys collected each year by the U.S. Department of Education's National Center for Educational Statistics (NCES) through its IPEDS surveys. The sample for this analysis includes all active, degree granting institutions of higher education in the United States. From the categories provided by IPEDS, WCET's sample for all three years (Fall 2012-Fall 2014):

- includes U.S. only degree-granting institutions (including U.S. territories),
- includes all 2 and 4 year schools,
- excludes administrative units (such as state university system offices), and
- excludes less than 2 year schools.

For this report, WCET and the Babson Survey Research Group (BSRG) decided to harmonize the data sets and sample of institutions selected for our analyses. The following changes from past practices were implemented:

- In the past, WCET selected variables in the IPEDS Data Center and used the data set uploaded as a result of that selection. BSRG had always downloaded the entire data set and eliminated institutions based upon similar criteria. A difference of about 100 institutions was discovered as inexplicably being left off the set that WCET downloaded. We decided to use BSRG's method.
- In selecting the "U.S. only" option, institutions in the U.S. territories were excluded. We decided to include institutions in the territories, as they are eligible for federal financial aid.
- BSRG used to include "administrative units." Since they added no enrollments, we both decided to exclude them.

¹¹ WCET *Frontiers* Blog: <https://wctblog.wordpress.com/2014/09/25/ipeds/>

¹² *Inside Higher Ed*: "An Insufficient Census", September 16, 2014:

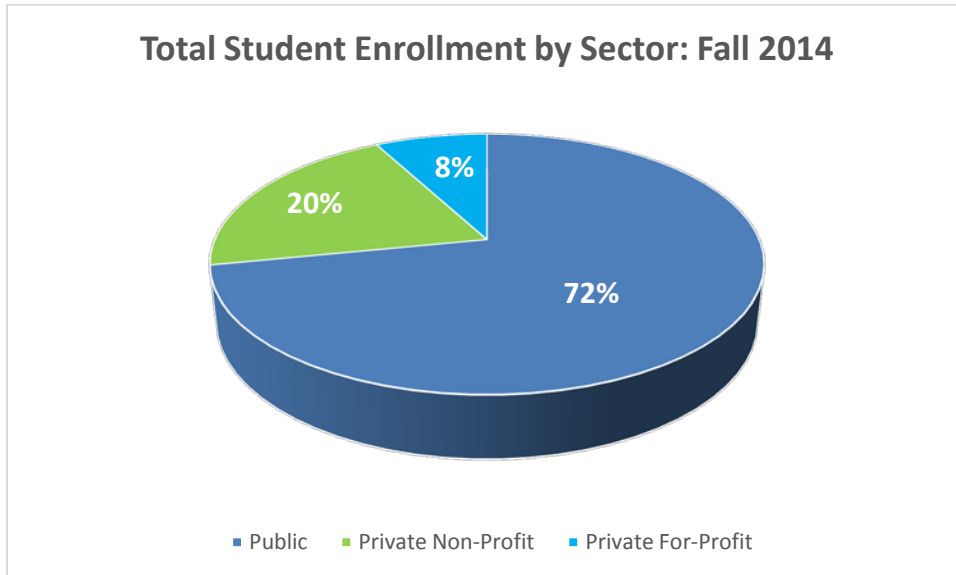
<https://www.insidehighered.com/news/2014/09/26/ipeds-survey-misses-thousands-online-students-often-counts-too-many>

¹³ WCET *Frontiers* Blog: "Education Department Urges Colleges to Follow IPEDS Distance Ed Definitions"

<https://wctblog.wordpress.com/2014/10/17/follow-ipeds-dist-ed-definitions/>

Overall Higher Education Enrollment

Total Student Enrollment by Sector: Fall 2014



Overall Higher Education Enrollment: Fall 2014		
Higher Education Sector	Total Enrollments	Sector Enrollment as Percentage of Total Enrollment
Public	14,735,637	72%
Private Non-Profit	4,165,426	20%
Private For-Profit	1,605,749	8%
Totals	20,506,812	100%

Observations:

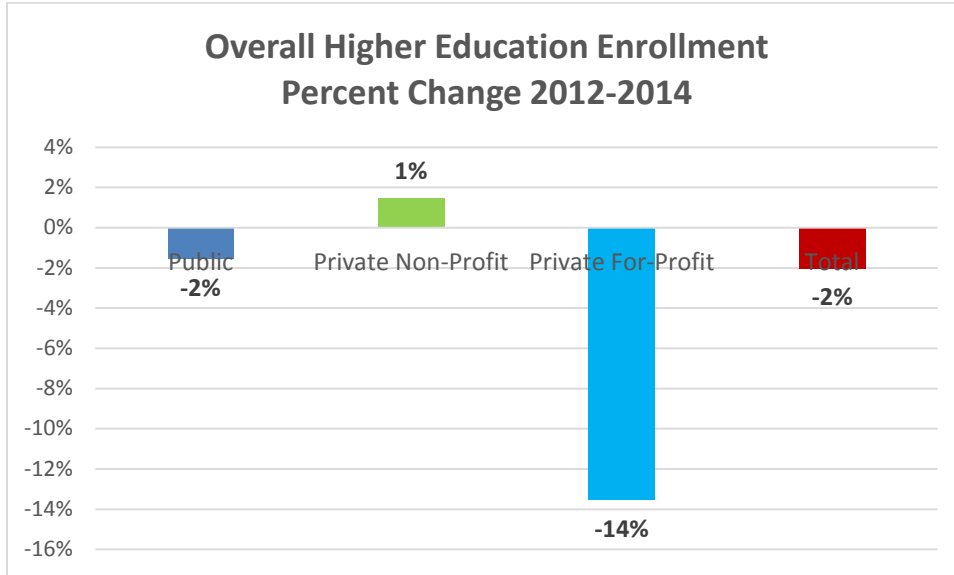
- Public institutions of higher education represented nearly three quarters of all enrollments (72%), private non-profits represented 20%, and for-profit institutions enrolled 8% of all students.

Commentary:

- The relative size of the higher education sectors is important to keep in mind in reviewing the following data on Distance Education enrollments.
- Since public institutions represent such a large proportion of enrollments, changes in that sector have a large impact on the totals.

Overall Higher Education Enrollment

Overall Education Enrollment by Sector: Fall 2012 – 2014



Overall Education Enrollment by Sector: Fall 2012-2014			
Higher Education Sector	Fall 2014 Total Student Enrollments	Fall 2012 Total Student Enrollments	% Change 2012-2014
Public	14,735,637	14,966,033	-2%
Private Non-Profit	4,165,426	4,105,872	1%
Private For-Profit	1,605,749	1,856,538	-14%
Totals	20,506,812	20,928,443	-2%

Observations:

- Overall higher education enrollments declined by 2% for the period Fall 2012 to Fall 2014.
- This decrease represents 421,631 fewer students over this two-year time period.
- Comparing 2014 overall enrollments to data from 2012 reveals a greater impact in one sector:
 - The private non-profit sector experienced modest growth (1% and 59,554 students).
 - The for-profit sector experienced a significant decrease (-14% and -250,789 students).

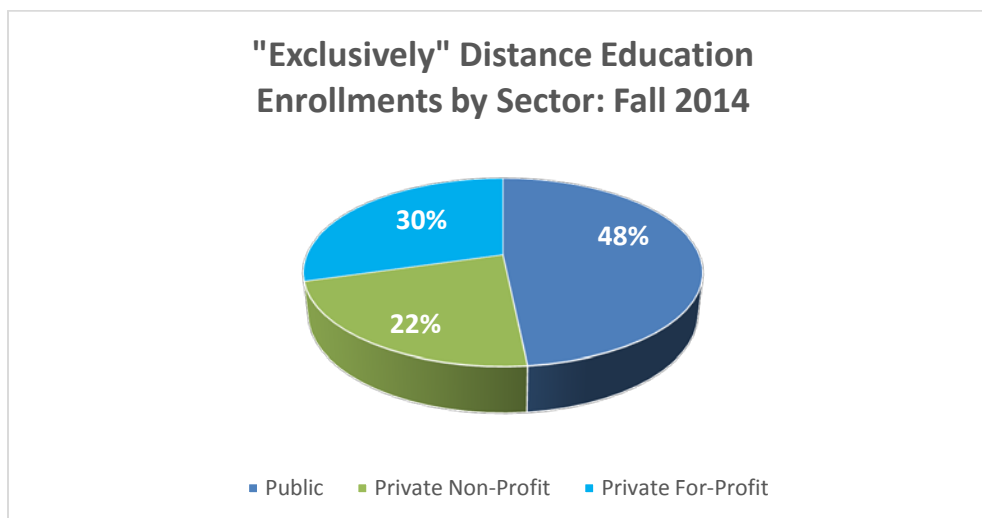
- Public institutions experienced a slight decrease (-2% and -230,396 students).
- The proportion of total enrollments by each sector remains fairly consistent with the data reported for 2012. In 2012, public institutions were 72%, private non-profits were 20%, and private for-profits were 8% of total enrollment.

Commentary:

- The total decline of 2% of overall enrollments is significant. However, looking only at the total decline masks the very significant decline in the for-profit sector, having lost 14% of total enrollments in just two years.
- The closure and consolidation of some for-profit higher education institutions has been in the news and is reflected in these results.
- Higher education enrollments are often inversely related to the economy. As the economy improves in many states, enrollments decline.

Distance Education Enrollments by Sector: Fall 2014

"Exclusively" Distance Education Courses



"Exclusively" Distance Education Enrollments: Fall 2014	
Higher Education Sector	Enrollments
Public	1,382,872
Private Non-Profit	632,341
Private For-Profit	843,579
Total	2,858,792

Students enrolled "Exclusively" at a distance took all of their courses at a distance for the Fall term of 2014.

Observations:

- One-in-seven (14%) of all higher education students took all of their courses "Exclusively" at a distance.
- Almost half (48%) of those students learning "Exclusively" at a distance did so at a public institution.
- For-profit institutions accounted for slightly less than one-third (30%) of "Exclusively" distance enrollments.

One in Seven

Students Learn Exclusively at a Distance



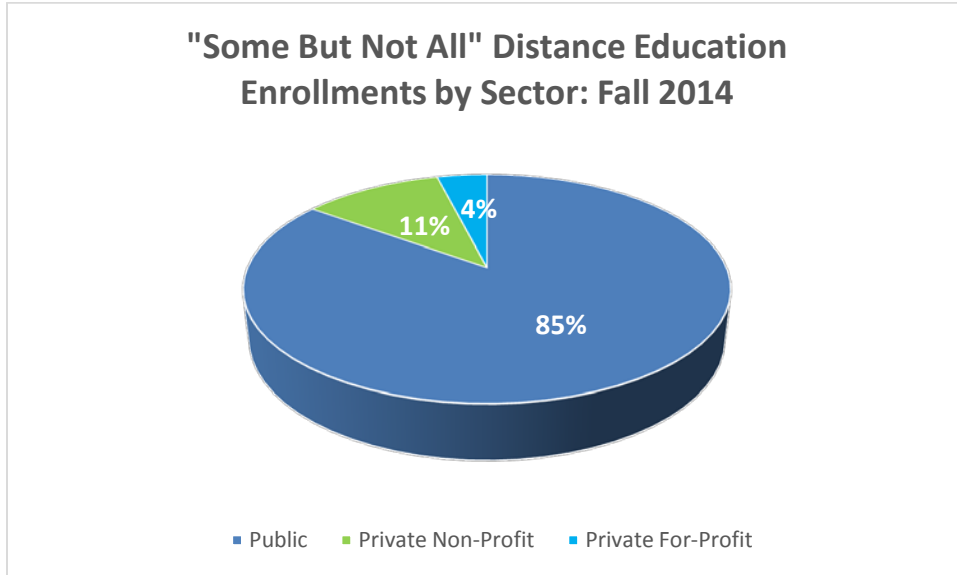
Commentary:

- At 14% of all higher education students, those who learn “Exclusively” at a distance was a significant minority of all higher education enrollments. As a comparison, that is 1.2 million more students than were enrolled in all for-profit institutions in Fall 2014.
- “Exclusively” Distance Education students are a growing segment of the overall student population. For last year's analysis of Fall 2013 enrollments, they comprised 12.5% (one-in-eight) of all higher education students.
- We still encounter policy-makers, members of the press, and higher education pundits who equate distance learning with for-profit institutions. While for-profit institutions tend to enroll more “Exclusively” distance students as a percentage of their population, they account for less than one-third of all distance students. Sweeping generalizations¹⁴ about distance or online learning are often uninformed.
- Despite the tremendous hype of MOOCs (Massive Open Online Courses) over the past few years, the massive enrollments in those courses are almost completely absent from the reported counts. The vast majority of MOOCs are not-for-credit and those students are not included in IPEDS surveys.
- Private non-profit institutions enrolled 21% of “Exclusively” distance students. There were more students learning "Exclusively" at a distance at public and non-profit institutions (2,015,213) than were enrolled (whether face-to-face or at a distance) in all for-profit institutions (1,605,749).

¹⁴ "Does Online Ed Lack Integrity", Inside Higher Ed, August 13, 2015:
<https://www.insidehighered.com/news/2015/08/13/clinton-higher-education-plan-questions-integrity-online-learning>

Distance Education Enrollments by Sector: Fall 2014

"Some But Not All" Distance Education Courses



"Some But Not All" Distance Education Enrollments: Fall 2014	
Higher Education Sector	Enrollments
Public	2,524,030
Private Non-Profit	328,410
Private For-Profit	117,594
Total	2,970,034

Students enrolled in "Some But Not All" courses at a distance as part of their course load mix in the Fall of 2014.

Observations:

- One-in-seven (14%) of all higher education students took "Some But Not All" of their courses at a distance.
- Public institutions represented the vast majority (85%) of "Some But Not All" Distance Education enrollments in 2014.

- Private non-profits represent 11% of these enrollments, while the for-profit institutions represent just 4% of Distance Education enrollments in this category.

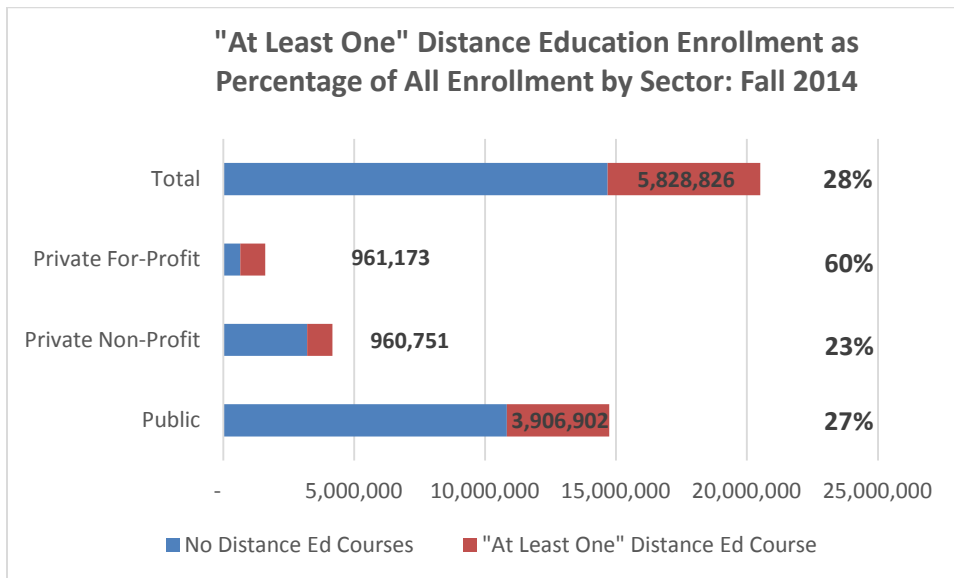
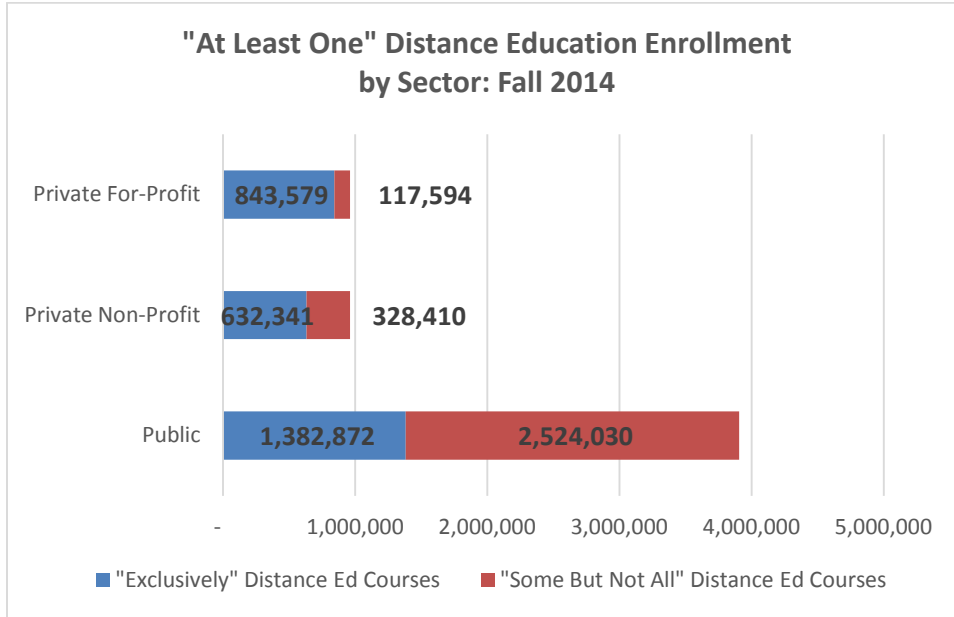
Commentary:

- The large majority of public enrollments in “Some But Not All” Distance Education suggests that distance courses have become part of the mix of course offerings at many public universities.
- It is likely that a few institutions included "blended"¹⁵ learning enrollments in these counts. The extent of such an inclusion is unknown.
- There are no national counts of "blended" learning enrollments. If there were, it is likely that an even larger percentage of students experienced some form of distance learning in Fall 2014.
- Through our own observations, many traditional universities are using online courses to meet demand from residential students, address classroom space shortages, and/or provide extra sections. The notion of a "distance" changes from being geographically separated to time-shifting for these students. Residential students should be notified that the course is a distance or blended course prior to enrollment. Students who never come to campus are usually offered orientations on how to succeed. Likewise, on-campus students also need orientation and support services to succeed in this mode of instruction.

¹⁵ Blended learning is: "Online activity is mixed with classroom meetings, replacing a significant percentage, but not all required face-to-face instructional activities." The definitions are still evolving for "blended" and "distance" learning. This definition used came from a recent work by the Online Learning Consortium: <http://onlinelearningconsortium.org/updated-e-learning-definitions-2/>

Distance Education Enrollments by Sector: Fall 2014

"At Least One" Distance Education Course



"At Least One" Distance Education Enrollment by Sector: Fall 2014					
Higher Education Sector	Total Enrollment	"Exclusively" DE course Enrollments	"Some But Not All" DE course Enrollments	Students enrolled in "At Least One" DE course as % of Total Sector Enrollment	
Public	14,735,637	1,382,872	2,524,030	3,906,902	27%
Private Non-Profit	4,165,426	632,341	328,410	906,751	23%
Private For-Profit	1,605,749	843,579	117,594	961,173	60%
Totals	20,506,812	2,858,792	2,970,034	5,828,826	28%

Students enrolled in "At Least One" Distance Education course includes the sum of students who took some or all of their courses at a distance.

Observations:

- More than one in four students (28%) enrolled in at least some of their courses at a distance in 2014.
- There is variation in the proportion of students taking "At Least One" course at a distance by sector:
 - 27% of public institution students took "At Least One" Distance Education course.
 - 23% of private non-profit students took "At Least One" Distance Education course.
 - 60% of private for-profit students took "At Least One" Distance Education course.
- More than two-thirds (67%) of students enrolled in "At Least One" distance course do so at a public institution.
- More than half of for-profit students (53%) were "Exclusively" at a distance and just over one-third (40%) of for-profit did not take any distance courses.



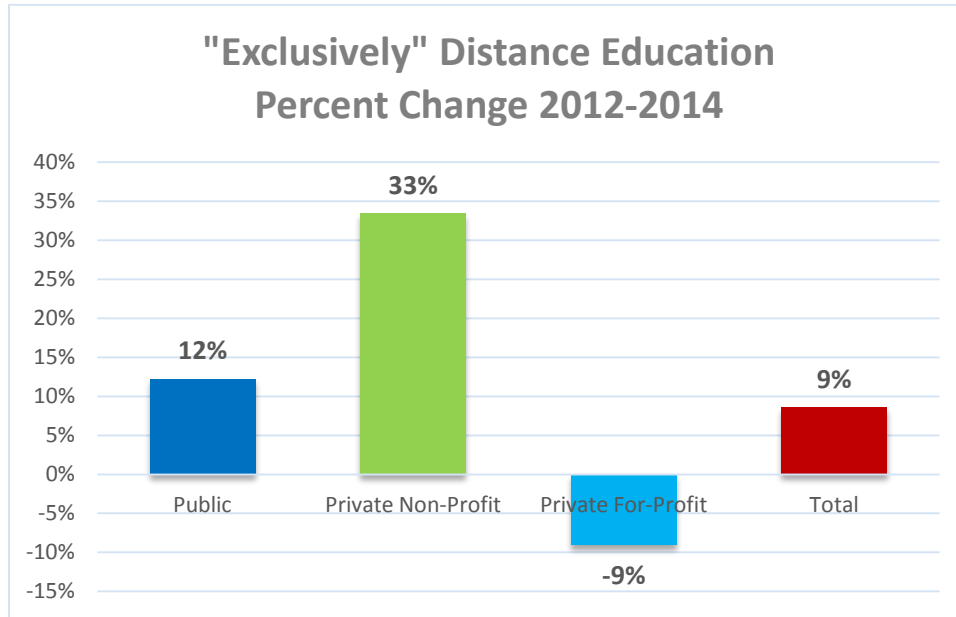
One in Four Students Are Taking at Least One Distance Course

Commentary:

- With more than one in four students (28%) taking some of their courses at a distance, these courses seem to have become a common part of the course delivery modality for many students.
- Judging by the enrollments, private colleges view distance courses as primarily a tool to service distance students. Public colleges incorporate distance courses for both on-campus and distance students.
- In our observations, for-profit colleges with distance/online offerings often target adult learners. For-profit institutions are surprisingly less likely to include distance offerings as part of a mix with face-to-face courses.
- In looking to the future, it will be increasingly difficult to maintain large year-to-year growth in percentages as it will take a larger number of students each year to grow by a single percentage point.

Distance Education Enrollments by Sector: Fall 2012 – 2014

“Exclusively” Distance Education Courses



“Exclusively” Distance Ed Enrollment Percent Change: 2012-2014			
Higher Education Sector	Fall 2014 Enrollments	Fall 2012 Enrollments	% Change 2012-2014
Public	1,382,872	1,231,816	12%
Private Non-Profit	632,341	473,800	33%
Private For-Profit	843,579	927,899	-9%
Totals	2,858,792	2,633,515	9%

Observations:

- The growth in "Exclusive" Distance Education enrollments for the period Fall 2012 to Fall 2014 is 9% for all sectors.
- Nearly a quarter million more students (225,277) are reported to be learning "Exclusively" at a distance over this two-year time period.
- Comparing 2014 “Exclusively” DE enrollments to data from 2012 reveals great disparities by sector:

- The private non-profit sector experienced tremendous growth (33%).
- The for-profit sector experienced a significant decrease (-9%).
- Public institutions experienced a 12% growth (151,056 students) over two years.
- The growth for public and non-profit institutions combined is 18%.
- Comparisons of 2012 to 2013 data (using a very slightly different dataset) yielded a 9% increase in private non-profit enrollments, a 2% increase in public enrollments, and an 8% decrease in private for-profit enrollments.

Commentary:

- “Exclusively” Distance Education enrollments remain volatile year to year by sector.
- Some institutions may still be refining their processes to accurately report these enrollments. See the "Possible Shortcomings of Data Reporting" section of the introduction. Such refinements may cause variability in the data that is difficult to uncover as the changes in processes may be singular to an individual institution.

Bottom line: it is possible that a small amount of the growth in distance enrollments may be due to institutions bringing their processes in line with IPEDS definitions or reporting enrollments that previously were excluded (see page 9 of this report¹⁶).

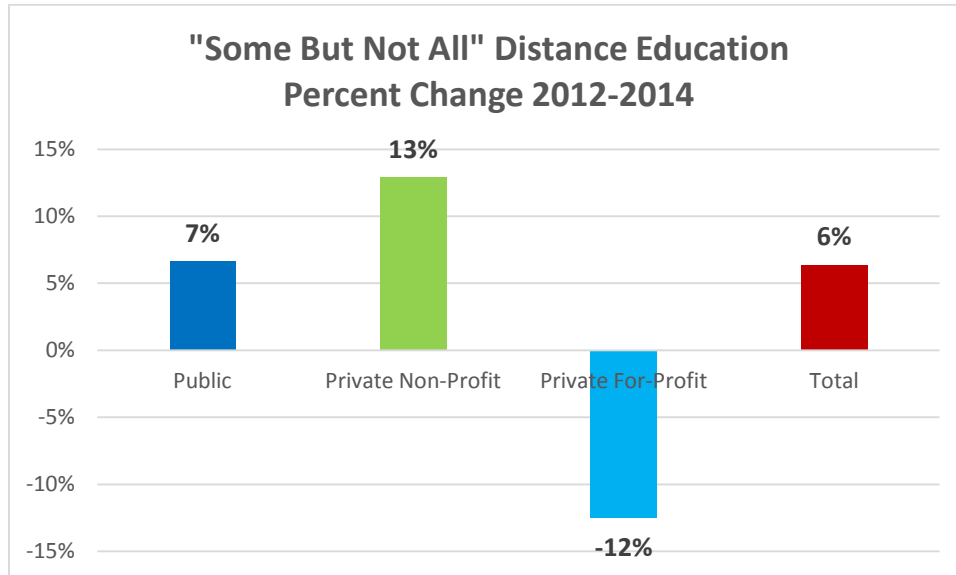
- The number of students learning "Exclusively" at a distance at public institutions (1,383,872) is approaching the total enrollment (whether face-to-face or at a distance) in all for profit-institutions (1,605,749).
- The for-profit sector has been under great scrutiny¹⁷ over the last few years and several (not all) of the institutions have changed their recruiting practices. In addition, the public and private non-profit colleges have increased the competition for students. These factors were some of the components in the reported decline.
- Arizona State University and Southern New Hampshire University are examples of colleges in the public and non-profit sectors that have been very aggressive in expanding their Distance Education enrollments in the past few years.

¹⁶ "Education Department Urges Colleges to Follow IPEDS Distance Ed Definitions", WCET *Frontiers* Blog, October 17, 2014. <https://wcetblog.wordpress.com/2014/10/17/follow-ipeds-dist-ed-definitions/>

¹⁷ "For Profit Higher Education: The Failure to Safeguard the Federal Investment and Ensure Student Success", July 30, 2012, United States Senate Health, Education, Labor and Pensions (HELP) Committee. http://www.help.senate.gov/imo/media/for_profit_report/PartI-PartIII-SelectedAppendixes.pdf

Distance Education Enrollments by Sector: Fall 2012 – 2014

“Some But Not All” Distance Education Courses



“Some But Not All” Distance Ed Enrollment Percent Change 2012-2014			
Higher Education Sector	Fall 2014 Enrollments	Fall 2012 Enrollments	% Change 2012-2014
Public	2,524,030	2,366,675	7%
Private Non-Profit	328,410	290,897	13%
Private For-Profit	117,594	134,319	-12%
Totals	2,970,034	2,791,891	6%

Students enrolled in "Some But Not All" courses at a distance as part of their course load mix in the Fall of 2014.

Observations:

- The growth in "Some But Not All" DE enrollments for the period Fall 2012 to Fall 2014 was 6% for all sectors.
- This increase represents 178,143 additional students over this two-year time period.

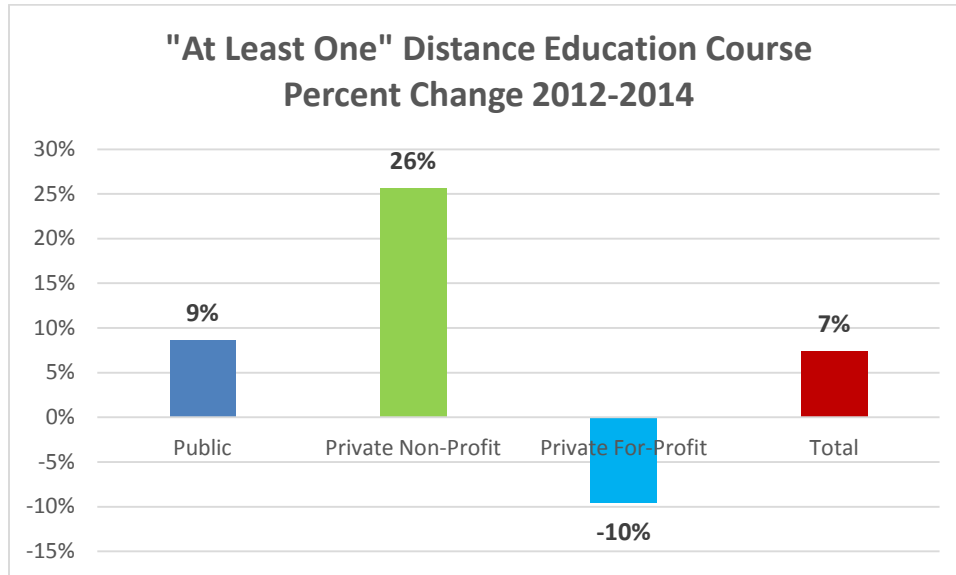
- Comparing 2014 “Some But Not All” DE enrollments to data from 2012 reveals great disparities by sector:
 - The private non-profit sector experienced 13% growth.
 - The for-profit sector experienced a significant decrease (-12%).
 - Public institutions experienced a 7% growth (157,355 students) over two years.
- Public institutions represent 88% of the growth in these enrollments.
- The total “Some But Not All” DE enrollments are similar to the total “Exclusively” DE enrollments: approximately 2.6-2.9 million over the period.
- Public institutions represent a commanding share with approximately 85% of these enrollments in both years reported.
- The growth trends in public education and private non-profit enrollments largely mask the significant decline in enrollments in for-profit institutions.

Commentary:

- With significant individual exceptions, the private non-profit sector has been the slowest to adopt Distance Education. As these colleges become more active in offering Distance Education, their enrollments will increase.

Distance Education Enrollments by Sector: Fall 2012 – 2014

“At Least One” Distance Education Course



"At Least One" Distance Education Course Percent Change 2012-2014			
Higher Education Sector	Fall 2014 Enrollment	Fall 2012 Enrollment	% Change 2012-2014
Public	3,906,902	3,598,491	9%
Private Non-Profit	960,751	764,697	26%
Private For-Profit	961,173	1,062,218	-10%
Totals	5,828,826	5,425,406	7%

“At Least One” DE Enrollment is the sum of “Exclusively” DE and “Some But Not All” DE.

Observations:

- The growth in "At Least One" DE enrollments for the period Fall 2012 to Fall 2014 is 7% for all sectors.
- This increase represents 403,420 additional students over this two-year time period.

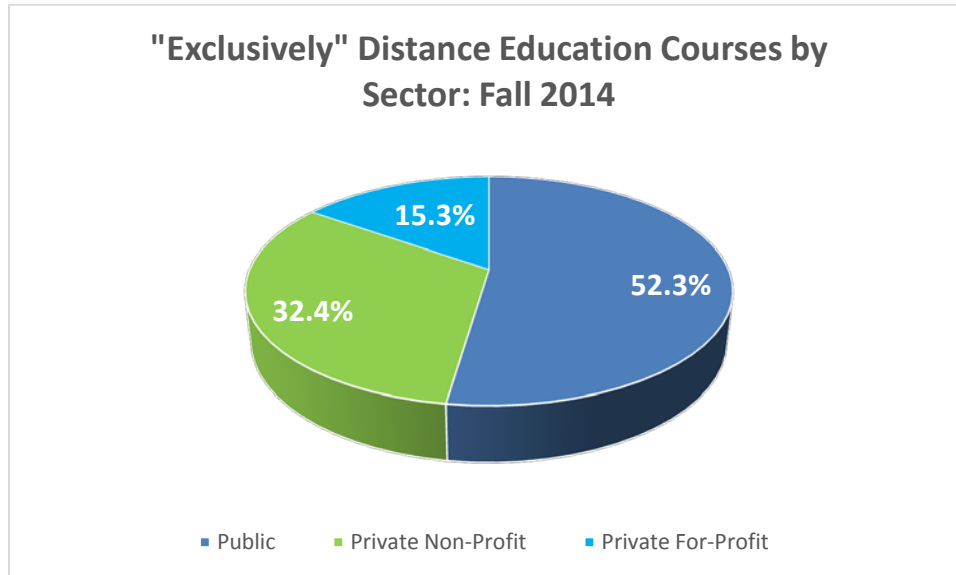
- Comparing 2014 “At Least One” DE enrollments to data from 2012 reveals great disparities by sector:
 - The private, non-profit sector experienced tremendous growth (26% and 196,054 students).
 - The for-profit sector experienced a significant decrease (-10% and -101,045 students).
 - Public institutions experienced a 9% growth (308,411 students).
- About two-thirds (67%) of all Distance Education is being taken at public institutions.

Commentary:

- Distance Education enrollments continue to grow at a healthy rate: 7% overall. The growth in Distance Education enrollments among public and private non-profit institutions during this time of overall enrollment decline is noteworthy. Many institutions are continuing to add Distance Education programs and grow existing ones while campus-based enrollments are declining.
- The for-profit sector almost fell to last place among sectors enrolling the most Distance Education students. This is a remarkable outcome when considering the for-profit sector led the private non-profit sector by more than one-quarter million (297,521) enrollments in 2012. In 2014, that difference fell to only 422 enrollments.
- The decline in private for-profit Distance Education enrollments is consistent with the closure and consolidation of some institutions in this sector.
- Some institutions may still be refining their processes to accurately report these enrollments. See the "Possible Shortcomings of Data Reporting" section of the introduction. Such refinements may cause variability in the data that is difficult to uncover as the changes in processes may be singular to an individual institution. It is possible that a small amount of the growth in distance enrollments may be due to institutions bringing their processes in line with IPEDS definitions or reporting enrollments that previously were excluded¹⁸.

¹⁸ "Education Department Urges Colleges to Follow IPEDS Distance Ed Definitions", WCET *Frontiers* Blog, October 17, 2014. <https://wcetblog.wordpress.com/2014/10/17/follow-ipeds-dist-ed-definitions/>

Institutions Reporting Distance Education Enrollments "Exclusively" Distance Education Courses by Sector: Fall 2014



"Exclusively" Distance Education Courses by Sector: Fall 2014	
Higher Education Sector	Number of Institutions Reporting "Exclusively" Distance Ed Enrollments
Public	1,523
Private Non-Profit	943
Private For-Profit	444
Totals	2,910

This data represents a simple count of institutions who reported having "Exclusively" Distance Education student enrollments in Fall 2014. This count gives us a picture of how many colleges are offering courses totally at a distance.

Observations:

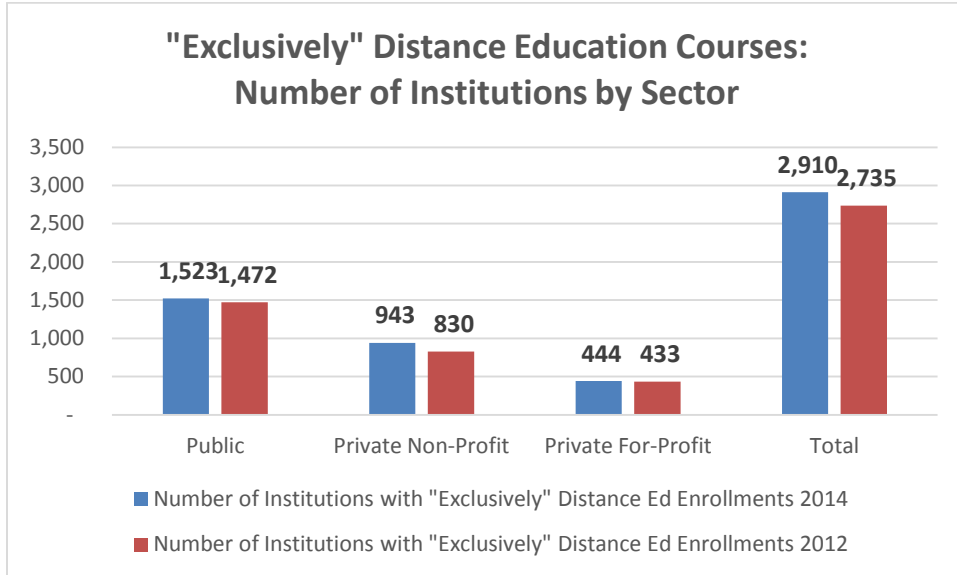
- Public institutions lead in offering Distance Education to students enrolled "Exclusively" at a distance, representing 52% of the total. Private non-profit institutions represent 32% of the total and Private for-profits represent 15%.

- The 2,910 institutions that reported fully Distance Education enrollments represent 61% of the universe of 4,806 institutions in the Fall 2014 data.

Commentary:

- A student would need to take all of their courses at a distance in the Fall term of 2014 to qualify for the "Exclusive" category. Therefore, most (if not all) of these institutions are probably offering academic programs that are available fully (or mostly) at a distance.
- Public institutions serving students fully at a distance outnumbers private for-profit institutions by more than three to one (1,523 public institutions to 444 for-profit institutions). In looking at enrollments, public enrollments of "Exclusively" distance students are only 1.6 times private for-profit enrollments (see page 16: 1,382,872 public enrollments to 843,579 for-profit enrollments). This implies that there is a group of for-profit institutions that have created large distance enrollments to make-up that difference.

Institutions Reporting Distance Education Enrollments “Exclusively” Distance Education Courses by Sector: Fall 2012-2014



"Exclusively" Distance Education Courses by Sector: Fall 2012-2014			
Higher Education Sector	Fall 2014 Number of Institutions with Exclusively DE Enrollments	Fall 2012 Number of Institutions with Exclusively DE Enrollments	% Change Fall 2012-2014
Public	1,523	1,472	3%
Private Non-Profit	943	830	14%
Private For-Profit	444	433	3%
Totals	2,910	2,735	6%

This data represents a simple count of institutions who reported having “Exclusively” Distance Education student enrollments in Fall 2014. This count gives us a picture of how many colleges are offering courses totally at a distance.

Observations:

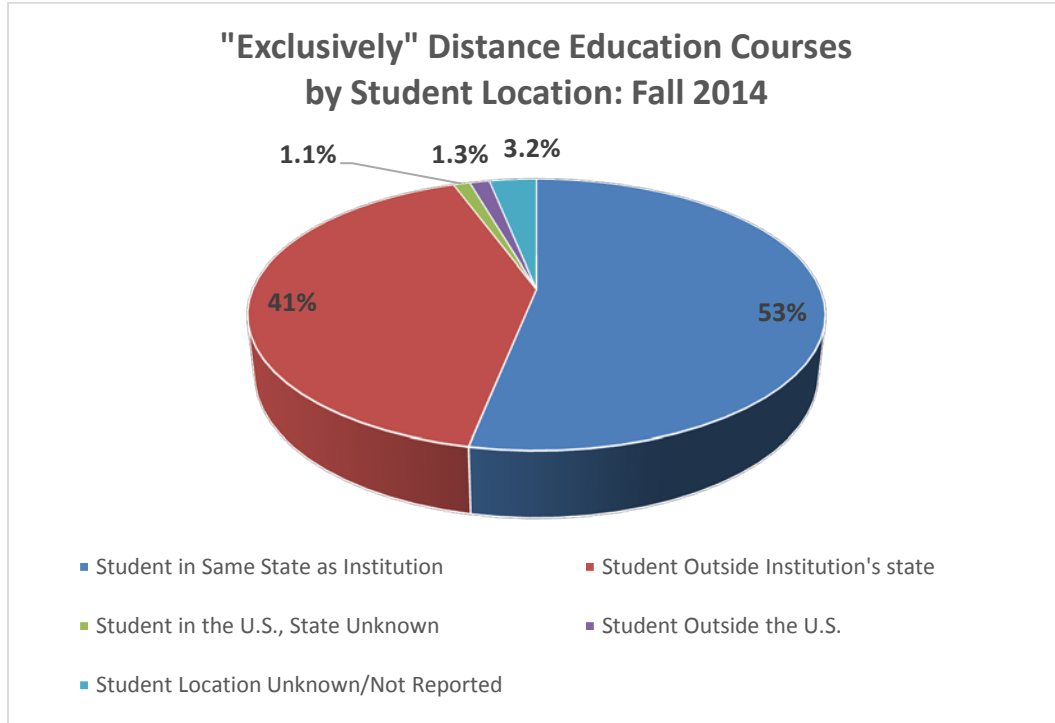
- A comparison of the number of institutions reporting "Exclusively" Distance Education enrollments in Fall 2012 and Fall 2014 reveals moderate growth (3%) in both public (+51) and private for-profit (+11) institutions.
- The private non-profits institutions with "Exclusively" Distance Education increased by 113 institutions (14%) over this period.

Commentary:

- The growth in institutions reporting students learning "Exclusively" at a distance suggests that additional institutions are launching academic programs that are fully or mostly available at a distance.
- For the private non-profit institutions, the 14% growth in institutions in this category probably goes a long way to explain their 33% growth in "Exclusively" Distance Education enrollments over this time period.

Distance Education Enrollments by Student Location

“Exclusively” Distance Education Courses by Student Location: Fall 2014



“Exclusively” Distance Education Courses by Student Location: Fall 2014						
Higher Education Sector	“Exclusively” Distance Ed Enrollments	% Enrolled in Same State as Institution	% Enrolled Outside Institution’s state	% Enrolled in the U.S., State Unknown	% Enrolled Outside the U.S.	% Enrolled Student Location Unknown/Not Reported
Public	1,382,872	84%	14%	0.7%	0.9%	1.1%
Private Non-Profit	632,341	37%	56%	1.9%	1.8%	3.1%
Private For-Profit	843,579	15%	75%	1.2%	1.7%	6.7%
Totals	2,858,792	53%	41%	1.1%	1.3%	3.2%

Observations:

- The sector analysis of this data confirms interesting trends that we first reported with the 2013 data¹⁹ and are reflected in the following bullets.
 - Public institutions report that 84% of their "Exclusively" DE students are from inside the institution's state.
 - Private for-profit institutions report that 75% of their "Exclusively" DE students are from outside of the state.
 - Private non-profit institutions report that over half (56%) of their "Exclusively" DE enrollments are from out-of-state.
- U.S. colleges and universities continue to serve very few international students through "Exclusively" DE courses, less than 2% in any sector. This data is consistent to the 2013 data previously reported.
- Private for-profit institutions report more students with an unknown location than the other sectors with 1.2% reported as "State Unknown" and 6.7% reported as "Location Unknown/Not Reported". A few colleges account for much of the reported enrollments in these categories:
 - Kaplan University-Davenport Campus, alone, represents over three quarters of the private for-profit enrollments reporting the student location is unknown or not reported.
 - Ultimate Medical Academy-Tampa, alone, represents over three quarters of the private for-profit enrollments reporting the student location as in the U.S. but which state is unknown.
- Private non-profit institutions report 3.1% of their "Exclusively" distance enrollments with the student location reported as "Location Unknown/Not Reported" and 1.8% reported as "State Unknown". A few colleges account for much of the reported enrollments in these categories:
 - Embry-Riddle Aeronautical University-Worldwide reported all of their "Exclusively" Distance Education enrollments as "Location Unknown/Not Reported". This represents over half of the non-profit enrollments that reported unknown student locations in this sector. This is surprising, as this institution has been strong in compliance activities.
 - Brigham Young University-Idaho, alone, represents almost half of the non-profit enrollments reporting the student location is in the U.S., but the state is unknown.
- Public institutions report 1.1% of their "Exclusively" distance enrollments with the student location reported as "Location Unknown/Not Reported" and .7% reported as "State Unknown".
 - University of South Florida-Main Campus was the public institution that reported the largest number of enrollments as "Location Unknown/Not Reported" in 2014.

¹⁹ "IPEDS Fall 2013: Less than Half of Fully Distant Students Come from Other States", March 12, 2015, WCET *Frontiers* Blog. <https://wcetblog.wordpress.com/2015/03/12/ipedsstateenrollments/>

- University of Northern Iowa was the public institution that reported the largest number of enrollments as “State Unknown”, reporting all of their “Exclusively” Distance Education course enrollments in that category.
- Many public institutions that reported their entire “Exclusively” Distance Education enrollments in one of the unknown categories in 2012 have improved their reporting and no longer report any enrollments as unknown in 2014.
- Only 1.3% of all "Exclusively" Distance Education enrollments are located outside the U.S.

Commentary:

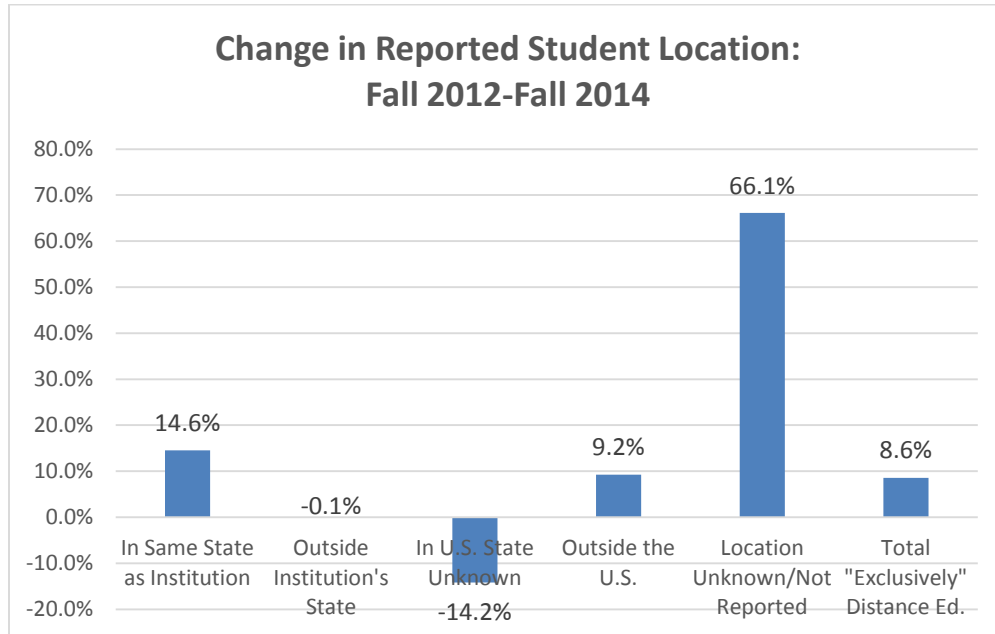
- Of particular interest to WCET and the WCET State Authorization Network (SAN)²⁰ are the data trends related to where “Exclusively” Distance Education students are located in relation to the institution. Institutions are expected to have obtained a state's authorization (or other approval, if needed) prior to enrolling students in that state. The first step in the state authorization process²¹ is for an institution to know where its students are located.
- While the total number of students in the "State Unknown" and "Location Unknown/Not Reported" categories is fairly small, it remains troubling. Institutions of higher education cannot be in compliance with state regulations if they don't know in which states they need to seek compliance.
- It is understandable that any institution may have a few students for whom they had trouble identifying the student's location. Institutions that have large numbers of students with state or location unknown, are not trying to comply with state laws or (for some reason) have decided not to report these locations to IPEDS.
- The number of Distance Education students served outside the U.S. does not appear to be a large percentage. This may be an area of future growth for colleges to pursue.
- A single institution that does not report the location of their students can have a large impact on the entire sector's enrollments reported as “Student Location Unknown/Not Reported” or “Student in U.S., State Unknown”.
- It is not surprising that public institutions focus on students within their own state, especially when public institutions sometimes charge differential tuition for non-resident students.
- It is surprising that the private for-profit sector has so many students in the "State Unknown" and "Location Unknown/Not Reported" categories. The for-profit institutions are more closely regulated by the states. The institutions from this sector that we have observed have long been in compliance with state authorization rules, even before the state authorization issue was highlighted in the federal regulations of 2010.

²⁰ WCET State Authorization Network: <http://wcet.wiche.edu/initiatives/state-authorization-network>

²¹ "10 Steps You Can to Begin the State Authorization Process", May 17, 2012, WCET *Frontiers* blog. <https://wcetblog.wordpress.com/2012/05/17/10-steps-to-begin-authorization/>

Distance Education Enrollments by Student Location

"Exclusively" Distance Education Courses by Student Location: Fall 2012 – 2014



Change in Reported Student Location: Fall 2012-Fall 2014			
Student Location	2014	2012	% Change Fall 2012- 2014
Student in Same State as Institution	1,518,752	1,325,721	14.6%
Student Outside Institution's State	1,180,335	1,181,968	-0.1%
Student in U.S., State Unknown	31,682	36,923	-14.2%
Student Outside the U.S.	37,788	34,590	9.2%
Student Location Unknown/Not Reported	90,235	54,313	66.1%
Total "Exclusively" DE Enrollments	2,858,792	2,633,515	8.6%

Observations:

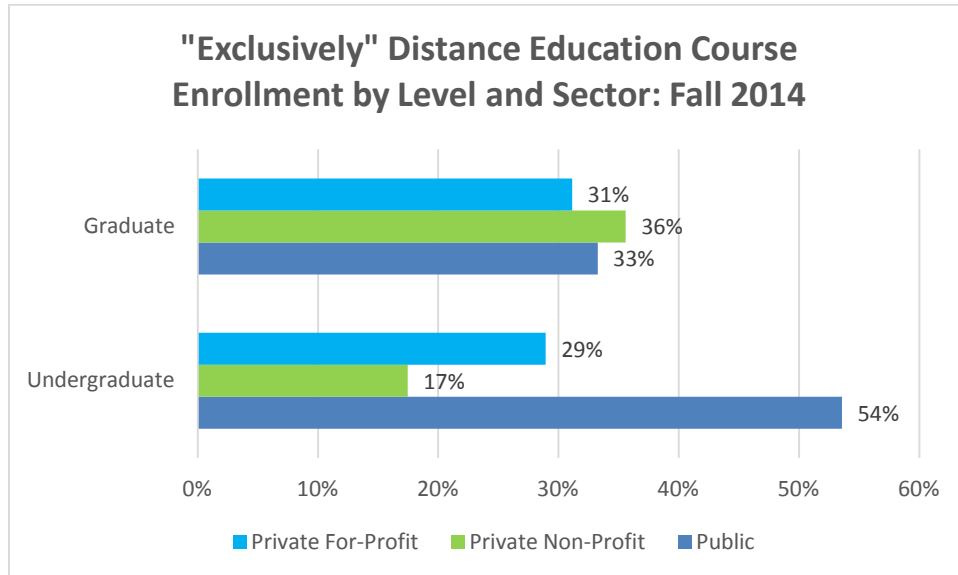
- Overall, there was an 8.6% increase in all “Exclusively” Distance Education enrollments in the two year period.
- Changes in student reporting between Fall 2012 and Fall 2014 reveal inconsistent trends.
- The biggest change is a 66% increase in the category "Student Location is Unknown/Not Reported." This suggests that we are headed in the wrong direction with regard to getting a handle on where students are located. The total numbers in this category are small and may be due to actions by a few institutions.
- There is a 14% improvement in the reporting of students in the "U.S., State Unknown."
- There is very little change (-0.1%) in the number of institutions reporting that their “Exclusively” distance students are outside of their state.
- A 9% increase in international students (or U.S. students who are living outside the U.S.) is reported.

Commentary:

- This data remains very important to WCET members and others interested in state authorization and related compliance issues.
- While the number of students reported in the "U.S., State Unknown" decreased, the "Location Unknown/Not Reported" category grew by an alarming 66.1%. If the two categories for which the students' location is not known are combined, there is an increase of 30,681 (33.6%). This percentage far exceeds the overall growth rate of 8.6% for "Exclusively" distance students. As more information became available about state authorization compliance, we would have not expected the number of students reported in these categories to have grown.
- In Fall 2012, the public institutions had the most students with unknown locations. This year, the for-profit institutions have taken the lead.
- This data remains volatile as institutions continue to refine their data reporting since the IPEDS Distance Education requirements have been better understood over time.
- Additional analysis is needed to determine the source of the increase. Just a few large institutions who neglect to report where their students are located can skew this data.

Distance Education Enrollments by Level and Sector

“Exclusively” Distance Education Courses: Graduate and Undergraduate: Fall 2014



"Exclusively" Distance Education Enrollment: Fall 2014		
Higher Education Sector	Total Undergraduate Enrollment	Total Graduate Enrollment
Public	1,139,020	243,852
Private, Non-Profit	371,365	260,976
Private, For-Profit	615,255	228,324
Totals	2,125,640	733,152

Students enrolled “Exclusively” at a distance took all of their courses at a distance for the Fall term of 2014.

Observations:

- There are nearly three times as many undergraduate enrollments (2,125,640) as graduate enrollments (733,152) that are “Exclusively” at a distance.

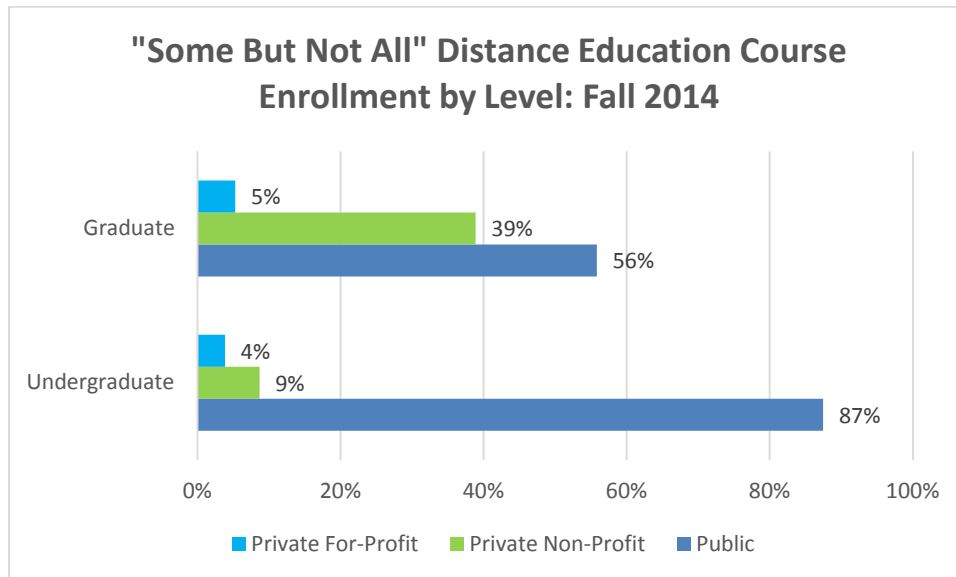
- Public institutions lead “Exclusively” distance undergraduate enrollments with 54%, for-profits represent 29%, and private non-profits with just 17%.
- Graduate enrollments in “Exclusively” distance courses are nearly evenly split, with for-profits leading with 36%, publics reported 33%, and non-profits representing 31%.
- Public institutions enroll more than four times as many "Exclusively" distance undergraduates as graduate students.

Commentary:

- In moving to Distance Education, we have observed that universities often start with graduate programs. With their shorter duration, it is more cost-effective to develop and deliver fully distance graduate programs than undergraduate programs.
- It is sometimes difficult to assemble all of the general education courses to offer a fully distance undergraduate program. Even with those barriers, colleges enrolled more than two million students "Exclusively" at a distance. This category represents more than 10% of all higher education students enrolled in Fall 2014.

Distance Education Enrollments by Level and Sector

“Some But Not All” Distance Education Courses: Graduate and Undergraduate: Fall 2014



“Some But Not All” Distance Education Enrollment by Level and Sector: Fall 2014		
Higher Education Sector	Total Undergraduate Enrollment	Total Graduate Enrollment
Public	2,393,864	130,166
Private, Non-Profit	237,746	90,664
Private, For-Profit	105,269	12,325
Totals	2,736,879	233,155

Students enrolled in “Some But Not All” courses at a distance had online courses as part of the mix of their course load in the Fall of 2014.

Observations:

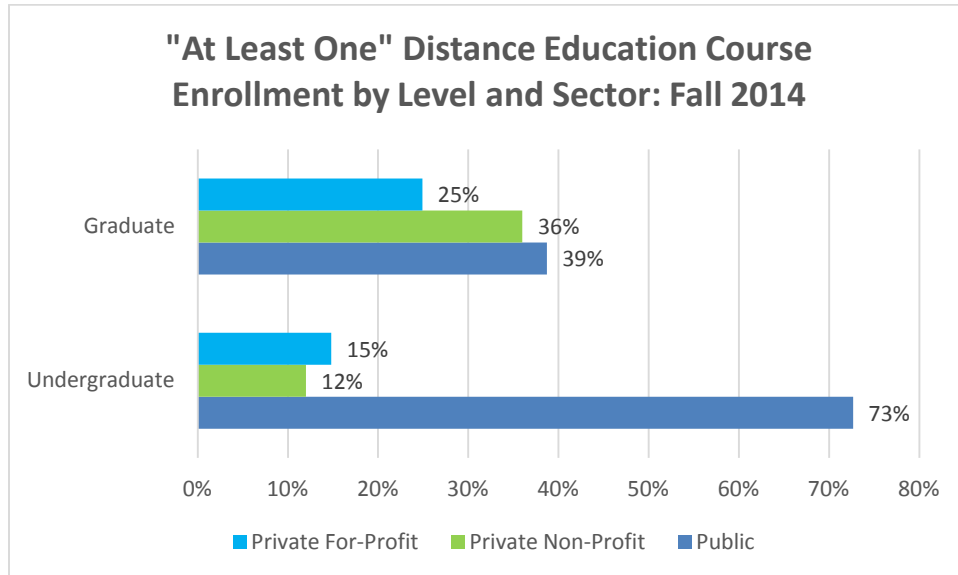
- Public institutions command the majority of “Some But Not All” enrollments at both the undergraduate level (87%) and at the graduate level (56%).
- Private non-profits represent the second largest enrollment group at both levels, 9% of undergraduate enrollment and 39% of graduate enrollment in “Some But Not All” Distance Education.
- Private for-profits represent the smallest enrollment group, 5% of undergraduate enrollments and 4% of graduate enrollments in the “Some But Not All” category of Distance Education courses.
- While for-profit institutions have 228,324 "Exclusively" graduate distance students, they have very few graduate students who take a few of their courses at a distance.
- Private non-profit institutions had 28% of its "Some But Not All" students at the graduate level, public colleges had 5% and for-profit Colleges had 10% as graduate students.

Commentary:

- It is much more likely that an undergraduate student might pick up a course or two that is taught at a distance than a graduate student.
- As previously noted, this data on mixed enrollments (both face-to-face and distance) suggests that distance courses have become part of the menu of courses offered at many public institutions.

Distance Education Enrollments by Level and Sector

“At Least One” Distance Education Course: Graduate and Undergraduate: Fall 2014



"At Least One" Distance Education Enrollment: Fall 2014		
Higher Education Sector	Total Undergraduate Enrollment	Total Graduate Enrollment
Public	3,532,884	374,018
Private, Non-Profit	609,111	351,640
Private, For-Profit	720,524	240,649
Totals	4,862,519	966,307

Students enrolled in "At Least One" Distance Education course includes the sum of students who took some or all of their courses at a distance.

Observations:

- Public institutions represent nearly three-quarters (73%) of Distance Education enrollments at the undergraduate level. They also represent the largest proportion of graduate enrollment at a distance (39%).
- Private non-profit institutions represent 12% of undergraduate and 36% of graduate enrollments at a distance.

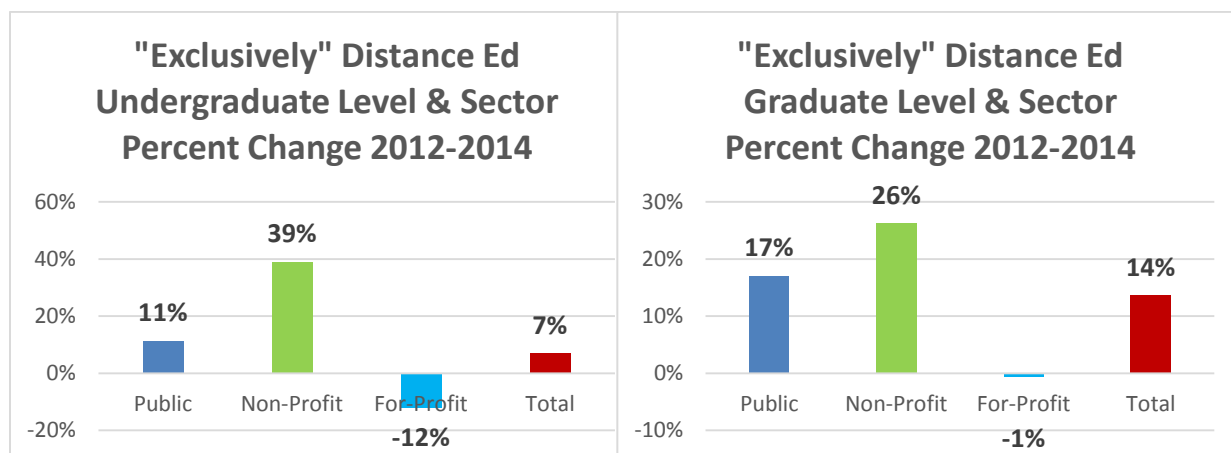
- Private for-profits institutions represent 15% of undergraduate and 25% of graduate enrollments at a distance.

Commentary:

- Public institutions lead in overall Distance Education enrollments, despite the efforts of the other sectors to increase their Distance Education enrollments.
- Private non-profits have built a niche in fully distance graduate programs.
- Students are enrolling in distance courses in great numbers, as part of the mix of their course enrollments.

Distance Education Enrollments by Level and Sector: Fall 2012-2014

“Exclusively” Distance Education Courses: Graduate and Undergraduate: Fall 2012-2014



“Exclusively” Distance Education Percent Change: 2012-2014						
Higher Education Sector	Undergraduate Enrollment			Graduate Enrollment		
	Fall 2014	Fall 2012	% Change 2012-2014	Fall 2014	Fall 2012	% Change 2012-2014
Public	1,139,020	1,023,458	11%	243,852	208,358	17%
Private, Non-Profit	371,365	266,972	39%	260,976	206,828	26%
Private, For-Profit	615,255	698,222	-12%	228,324	229,677	-1%
Totals	2,125,640	1,988,652	7%	733,152	644,863	14%

Students enrolled “Exclusively” at a distance took all of their courses at a distance for the Fall term of 2014.

Observations:

- The growth in “Exclusively” Distance Education enrollments for the period Fall 2012 to Fall 2014 is 7% for undergraduate enrollments and 14% for graduate enrollments, representing 225,277 additional “Exclusively” Distance Education students in two years.

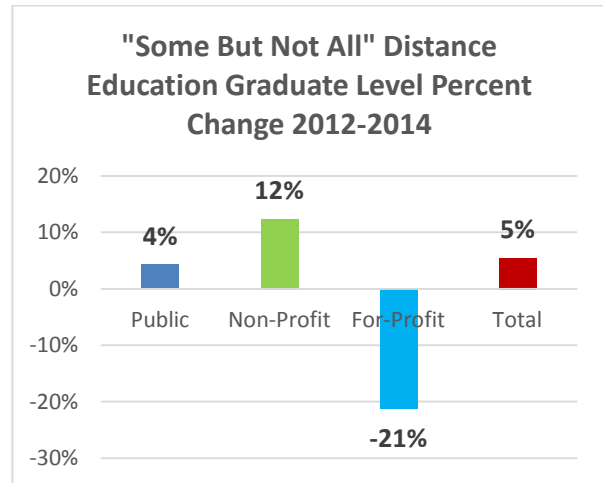
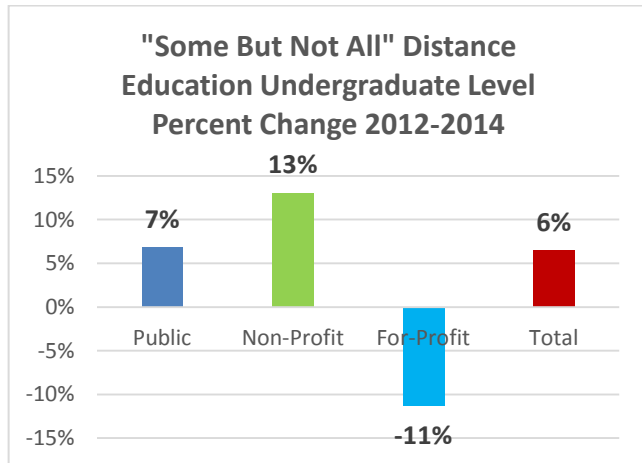
- 136,988 additional undergraduate students were reported and 88,289 additional graduate students were reported as “Exclusively” distant students in the two year period.
- Comparing 2014 undergraduate “Exclusively” DE enrollments to data from 2012 reveals great disparities by sector:
 - The private non-profit sector experienced tremendous growth (39%).
 - The for-profit sector experienced a significant decrease (-12%).
 - Public institutions experienced 11% growth (115,562 students) over two years.
- Comparing 2014 graduate “Exclusively” DE enrollments to data from 2012 also reveals great disparity by sector:
 - The private non-profit sector leads with growth of 26% (54,148 students) over two years.
 - The for-profit sector experienced a decline of 1% (-1,353 students).
 - The public sector experienced 17% growth (35,494 students) over two years.

Commentary:

- “Exclusively” Distance Education enrollments remain volatile year to year by sector for both the graduate and undergraduate level.
- The tremendous growth (39% in two years) in private non-profit enrollments of undergraduate probably indicates a desire by some institutions in this sector to catch-up in a market that they have not been overly active in serving.
- The public college growth (11% for undergraduates and 17% for graduates) is notably large increase in a short time. For undergraduate enrollment, this sector started with a much larger base, so the 11% growth is impressive.
- The large drop (12% in two years) in for-profit undergraduate enrollment is noticeably different than the drop (1% in two years) in graduate enrollments for that sector. This difference might be due to more continued profitability in the graduate sector and more recent scrutiny of their undergraduate enrollments.

Distance Education Enrollments by Level and Sector: Fall 2012-2014

“Some But Not All” Distance Education Courses: Graduate and Undergraduate: Fall 2012-2014



“Some But Not All” Distance Education Percent Change: 2012-2014						
Higher Education Sector	Undergraduate Enrollment			Graduate Enrollment		
	Fall 2014	Fall 2012	% Change 2012-2014	Fall 2014	Fall 2012	% Change 2012-2014
Public	2,393,864	2,241,912	7%	130,166	124,763	4%
Private, Non-Profit	237,746	210,248	13%	90,664	80,649	12%
Private, For-Profit	105,269	118,682	-11%	12,325	15,637	-21%
Totals	2,736,879	2,570,842	6%	233,155	221,049	5%

Students enrolled in "Some But Not All" courses at a distance had online courses as part of the mix of their course load in the Fall of 2014.

Observations:

- The growth in “Some But Not All” DE enrollments for the period Fall 2012 to Fall 2014 is consistent, 6% for undergraduates and 5% for graduate students.
- This increase represents 166,037 more undergraduates and 12,106 more graduate students.

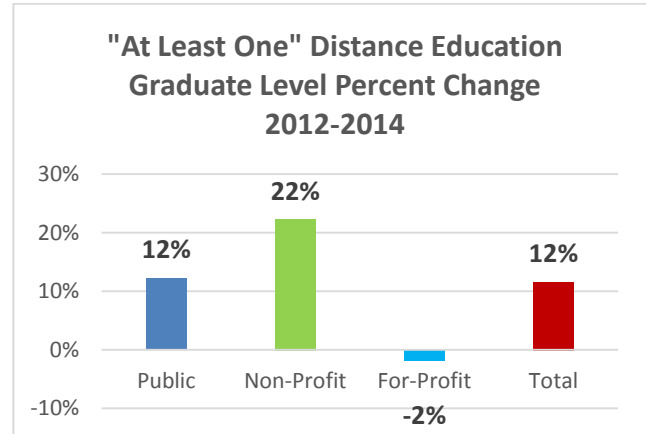
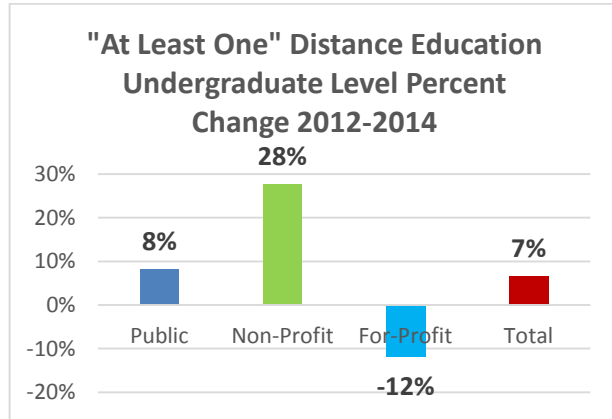
- Comparing undergraduate 2014 “Some But Not All” DE enrollments to data from 2012 reveals disparities by sector:
 - Private non-profit institutions lead with 13% growth reported, representing 27,498 students.
 - Public institutions reported 7% growth in the same period, representing 151,952 students.
 - Private for-profits reported an 11% decline in growth or 13,413 fewer fully online students.
- Graduate “Some But Not All” DE enrollment trends mirror undergraduate trends for the period 2012-2014.
 - Private non-profits lead with 12% enrollment growth, or 10,105 additional students.
 - Public institutions reported lower growth at 4%, but that growth represents 5,403 new graduate students taking “Some But Not All” of their courses at a distance.
 - The decline in graduate student enrollments for private for-profit institutions is significant at 21%, or 3,312 fewer students reported in 2014 than in 2012.
- As noted in the sector analysis, the growth in public and private non-profit enrollments largely mask the sharply declining enrollments in the for-profit sector.

Commentary:

- The instances of students taking some of their courses face-to-face and some at a distance continue to grow. Students will continue to time-shift their attendance. Institutions can provide more options for taking classes.
- While the public undergraduate enrollment grew only by 7% in two years, it represents a growth of more than 150,000 students counted in this option. Public colleges and universities have led the way in offering mixed modes and continue to grow on that lead.
- While there were large percentage declines in for-profit distance enrollments for both degree levels. These were based on relatively small numbers. For-profit institutions tend to have fewer students mixing face-to-face and distance instruction.

Distance Education Enrollments by Level: Fall 2012-2014

“At Least One” Distance Education Course: Graduate and Undergraduate:
Fall 2012-2014



"At Least One" Distance Education Percent Change: 2012-2014						
Higher Education Sector	Undergraduate Enrollment			Graduate Enrollment		
	Fall 2014	Fall 2012	% Change 2012-2014	Fall 2014	Fall 2012	% Change 2012-2014
Public	3,532,884	3,265,370	8%	374,018	333,121	12%
Private, Non-Profit	609,111	477,220	28%	351,640	287,477	22%
Private, For-Profit	720,524	816,904	-12%	240,649	245,314	-2%
Totals	4,862,519	4,559,494	7%	966,307	865,912	12%

Students enrolled in "At Least One" Distance Education course includes the sum of students who took some or all of their courses at a distance.

Observations:

- Enrollment growth for all Distance Education courses is 7% for undergraduate enrollment and 12% for graduate enrollments.
- This increase represents 303,025 more undergraduate students and 100,395 more graduate students.

- Comparing undergraduate 2014 “At Least One” DE enrollments to data from 2012 reveals disparities by sector:
 - Private non-profit institutions lead with 28% growth reported, representing 131,891 additional students.
 - Public institutions reported 8% growth in the same period, representing 267,514 more students than in 2012.
 - Private for-profit institutions reported a 12% decline in growth or 96,380 fewer fully online undergraduate students.
- Graduate student enrollment comparisons by sector for the period 2012 to 2014 reveal similar trends to those reported for undergraduate enrollment by sector:
 - Private non-profit institutions reported the largest growth at 22% or 64,163 students.
 - Public institutions reported 40,897 more students, or 12% growth in the period.
 - Private for-profit institutions continue to report declining enrollment, 12% or 4,665 fewer graduate students between 2012 and 2014.

Commentary:

- Distance Education enrollments grew in the period Fall 2012 to Fall 2014. The growth in overall Distance Education enrollments is attributable to private non-profit and public institutions.
- The private non-profit sector demonstrates large growth as additional colleges enter the Distance Education market and colleges already offering distance courses expand their offerings.
- For-profit institutions reported declining enrollments at the graduate and undergraduate level.
- This decline in for-profit enrollment is likely due to the closure and consolidation of some institutions in this sector.



One in Four
Students Are
Taking at Least One
Distance Course

One in Seven
Students Learn Exclusively at a Distance



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