

# Digital Learning Compass:

## Distance Education Enrollment Report 2017

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I. Elaine Allen and Jeff Seaman





*Distance Education Enrollment Report 2017*

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*e-Literate* is a weblog about educational technology and related topics that is co-published by Michael Feldstein and Phil Hill, who are also partners at MindWires, an educational technology analyst and consulting firm. It covers a broad range of topics related to trends in education—particularly teaching and learning in higher education—that are impacted by technology.



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### **Babson Survey Research Group**

The Babson Survey Research Group (BSRG) is a survey design, implementation, and analysis organization. BSRG has worked on a number of large surveys including the annual survey of global entrepreneurship (GEM) involving more than 70 countries and 160,000 respondents worldwide and the thirteen annual surveys of online education covering all colleges and universities in the US.

# ACKNOWLEDGEMENTS

*Digital Learning Compass: Distance Education Enrollment Report 2017* is the first in a series of publications from the new research partnership of the Babson Survey Research Group, e-Literate, and WCET. This study takes a detailed look at the trends and patterns of distance education enrollments among U.S. degree-granting higher education institutions. Additional publications in the Digital Learning Compass series will provide detailed examinations of multiple facets of U.S. distance education.

The Digital Learning Compass partnership builds on the combined efforts of the three partner organizations. The Babson Survey Research Group began its studies in 2004 with support from the Alfred P. Sloan Foundation. The Foundation continued that commitment for eight years, supporting an independent study, offering full privacy for all respondents, and providing free distribution of all report publications. Most recently, we have partnered with both WCET and e-Literate, as each of these organizations contributed to the report series.

The current approach expands on our prior partnership. The three organizations now use a pooled approach to all data and analysis – we all use the same definitions and criteria, and we all see each other’s work. Each Digital Learning Compass publication has a single lead organization, with the others available to comment, offer suggestions, and add their voice.

Digital Learning Compass wants to thank our current partners, the Online Learning Consortium, Pearson, and Tyton Partners for contributing to our research and their strong support for our efforts in making this transition.

This report was edited and reviewed by Nate Ralph and we thank him for his suggestions, corrections, and careful attention to detail.

Finally, we need to thank those in the higher education community who have continued to provide us with ideas and requests. These reports are the better because of your input, and we hope you find them useful.



Co-Directors, Babson Survey Research Group, May 2017

# FOREWORD

This report marks the first in the new series of reports from Digital Learning Compass on the state of distance education among U.S. institutions from Digital Learning Compass. Digital Learning Compass is a research partnership composed of the Babson Survey Research Group, e-Literate, and WCET.

The authors of this particular report previously produced a series of annual reports, largely supported by the Alfred P. Sloan Foundation, and known originally as the Sloan Online Learning Reports. We have now embraced a cooperative approach, partnering with e-Literate and WCET to create a suite of related publications. This report may appear similar to our previous efforts, but the behind-the-scenes work has been quite different. The advantages of this partnership will become evident as additional Digital Learning Compass works are released during the coming year.

Over the course of fourteen annual reports, we have seen the pattern of the number of students taking at least one distance course show a steep rise over time. More recently, there has been a decline in the percent of students studying at a distance at for-profit institutions, while the overall numbers of distance student have continued to grow.

Our previous reports tracked a number of indicators of the role of distance education for higher education institutions. Some of these changed considerably, such as the proportion of institutions that considered distance education as critical for their long-term strategy, while others barely moved (e.g., there was no change in the lack of faculty acceptance of the value and legitimacy of online education). Look for further examinations of these and other factors in upcoming Digital Learning Compass publications.

This report relies on the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS) tracking of distance education. This resource will now provide regular, comprehensive information on the extent and role of online and distance education among U.S. institutions.



## EXECUTIVE SUMMARY

Distance education continued its pattern of growth for yet another year. Fall 2015 saw more than 6 million students taking at least one distance course, having increased by 3.9% over the previous year. This growth rate was higher than seen in either of the two previous years.

In higher education, 29.7% of all students are taking at least one distance course. The total distance enrollments are composed of 14.3% of students (2,902,756) taking exclusively distance courses and 15.4% (3,119,349) who are taking a combination of distance and non-distance courses. The vast majority (4,999,112, or 83.0%) of distance students are studying at the undergraduate level.

Public institutions continue to educate the largest proportion of distance students (4,080,565, or 67.8%), while private non-profit institutions passed the private for-profit sector for the first time.

Year-to-year changes in distance enrollments have been very uneven, with continued steady growth for the public sector, greater levels of growth (albeit on a much smaller base) for the private non-profit sector, and continuation of the decline in total enrollments for the private for-profit sector for the third year in a row.

The large-scale trends show the growing importance of the private non-profits as a key player in providing distance education. The top-level trends, however, do mask the wide variety of changes happening across all of higher education. Even though each of the three sectors grew at a different rate, the proportion of institutions within each sector reporting increases was very similar; two-thirds of the members of each sector reported more distance enrollments in 2015 than 2014. The large-scale declines in enrollments in the for-profit sector were driven by substantial decreases among a few of the largest institutions, not by an overall decline among most for-profit institutions.

Distance education enrollments remain highly concentrated in a relatively small number of institutions. Almost half of the distance education students are concentrated in just five percent of the institutions, while the top 47 institutions, only 1.0% of the total, enroll 23.0% (1,385,307) of all distance students.

The total number of students studying on campus (those not taking any distance course or taking a combination of distance and non-distance courses) dropped by almost one million (931,317) between 2012 and 2015. The largest declines came at for-profit institutions, which saw a 31.4% drop, followed by 2-year public institutions, which saw a 10.4% decrease.

The picture of change in distance enrollments is composed of a relatively few institutions having large gains or large losses, with most institutions showing modest changes in either direction. Among those institutions showing large gains, Southern New Hampshire University (a private non-profit) led the list with an increase of just under 400% between 2012 and 2015, growing by 45,085 students (from 11,286 to 56,371). Four other institutions grew their distance enrollments by more than 10,000 students during this period (Western Governors University, Brigham Young University-Idaho, University of Central Florida, and Grand Canyon University). The largest drops were recorded by the University of Phoenix and Ashford University, two for-profit institutions.



# DEFINITIONS

This report uses data collected under the U.S. Department of Education's National Center for Educational Statistics (NCES) Integrated Postsecondary Education Data System (IPEDS) Fall Enrollment survey. Beginning with Fall 2012, the data includes distance education enrollments.

The definitions used for this data collection are:

<i>Item</i>	<i>Definition</i>
<b>Distance education</b>	<p>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.</p> <p>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.</p>
<b>Distance education course</b>	<p>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.</p>
<b>Distance education program</b>	<p>A program for which all the required coursework for program completion is able to be completed via distance education courses.</p>

IPEDS collects distance education enrollments in two 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.

This report creates a third category – composed of the sum of “exclusively” and “some but not all” distance education courses:

- "At least one" distance education course: A new data field created as the sum of the above two categories. This category matches the historical data reported prior to the fall of 2012, when the BSRG survey was the *de facto* data available.

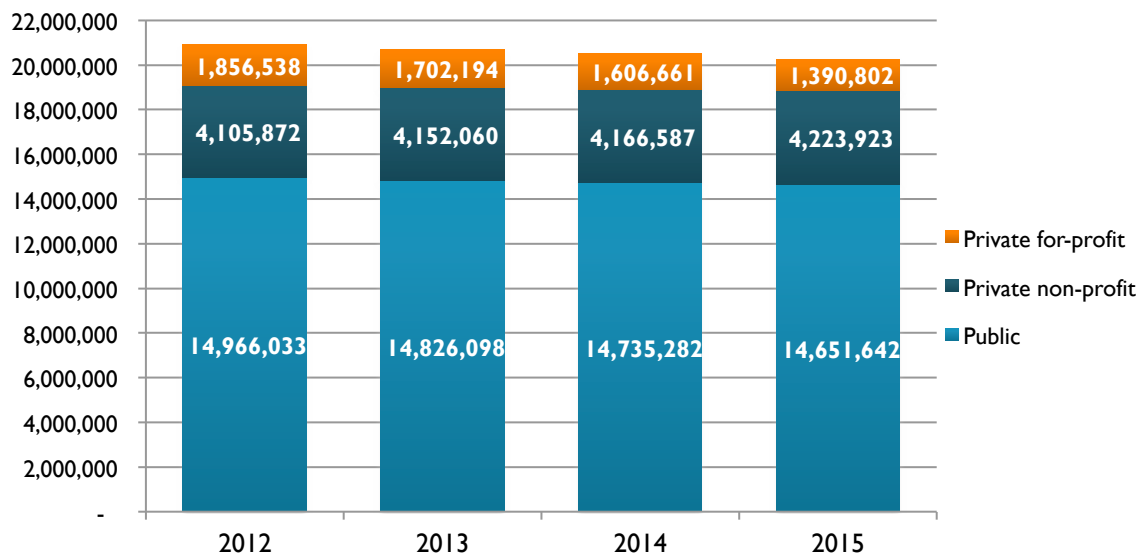
# PATTERNS IN OVERALL ENROLLMENTS

## Overall Higher Education Enrollments are Down

An understanding of the higher education context is important when examining the patterns and trends for distance education enrollments. After years of growth in the numbers of students enrolling in higher education, the industry is now facing a very different situation: the total number of students enrolled has dropped in each of the past three years.

There were 20,928,443 total students in fall 2012 at all levels enrolled across all degree-granting institutions that were active and open to the public. Three years later in the fall of 2015, this number had decreased by 662,076, or 3.2%, to 20,266,367. Overall enrollments decreased by 248,091 students from 2012 to 2013, by 171,822 from 2013 to 2014, and by a further 242,163 from 2014 to 2015. This pattern represents a new set of conditions for higher education institutions; the previous period of 2002 through 2012 averaged a 2.7% compound annual growth rate for overall enrollments. For the first time in over a decade, higher education institutions find themselves competing for a smaller pool of students.

TOTAL ENROLLMENT - DEGREE-GRANTING INSTITUTIONS - 2012-2015



## Overall Enrollment Changes Have Been Uneven

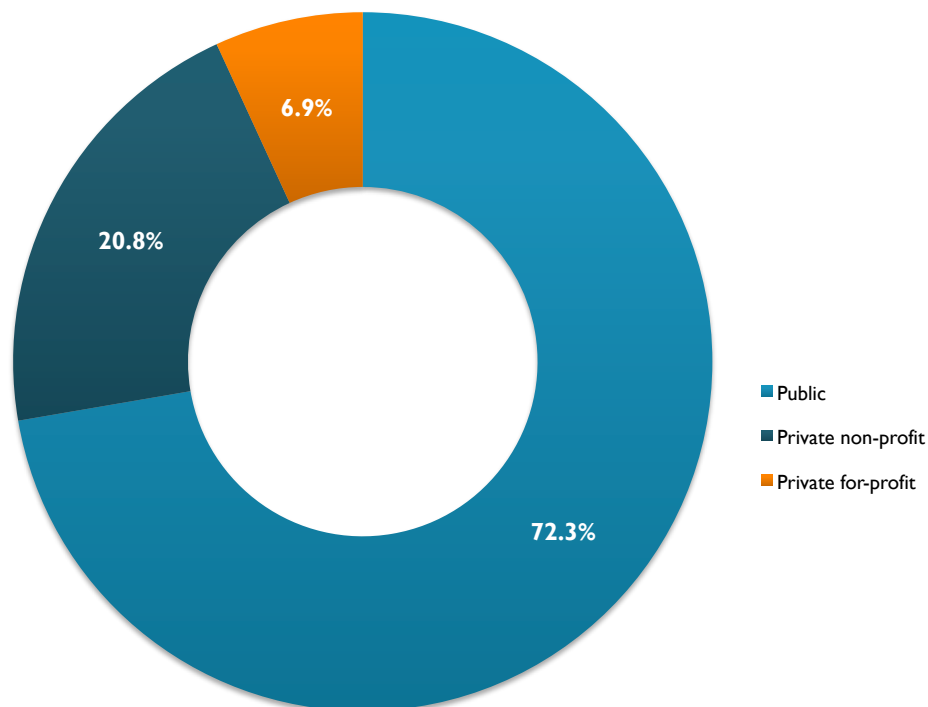
Not all areas of higher education are feeling the same pinch. Graduate enrollments actually grew, showing a small 1.0% gain over the three-year period.

Undergraduate enrollments at four-year institutions remained steady. The decline stems from undergraduate enrollments at two-year institutions, where there was a nearly 10% drop – down 688,887, or 9.5% between 2012 and 2015.

Percentage Change in Total Enrollment - 2012-15				
Level of institution	Percentage Change 2012 - 2015	Change 2012 - 2015	2012 Enrollment	2015 Enrollment
Undergraduate: 4 year school	0.0%	4,920	10,763,773	10,758,853
Undergraduate: 2 year school	-9.5%	688,887	7,214,275	6,525,388
Graduate	1.1%	(31,731)	2,950,395	2,982,126

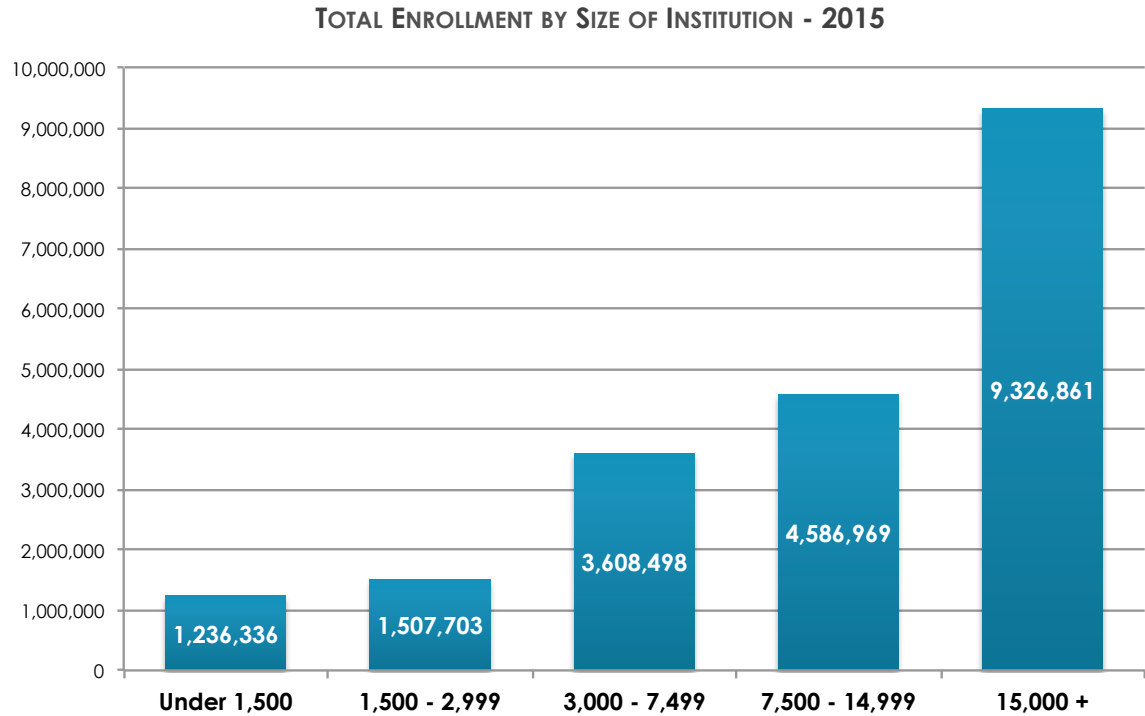
Based on data from fall 2015, the vast majority of all U.S. higher education students attend public institutions. Public institutions represented 72.3% of all fall 2015 enrollments. Private non-profits represented 20.8%, while for-profit institutions enrolled only 6.9% of all students. It's important to keep the relative size of these higher education sectors in mind when reviewing the following data on distance education. Public institutions represent nearly three-quarters of enrollments, so even a small percentage change in that sector can have a large impact on the totals.

### TYPE OF INSTITUTION TOTAL ENROLLMENT - 2015



## Most Distance Enrollments are at Larger Institutions

Larger institutions make up a small portion of all active degree-granting institutions, but command the lion's share of student enrollments. Schools with 15,000 or more total enrollments comprise only 7.1% of all institutions (341 of 4,836), yet they enroll over nine million students (9,326,861, or 46.0% of all student enrollments).

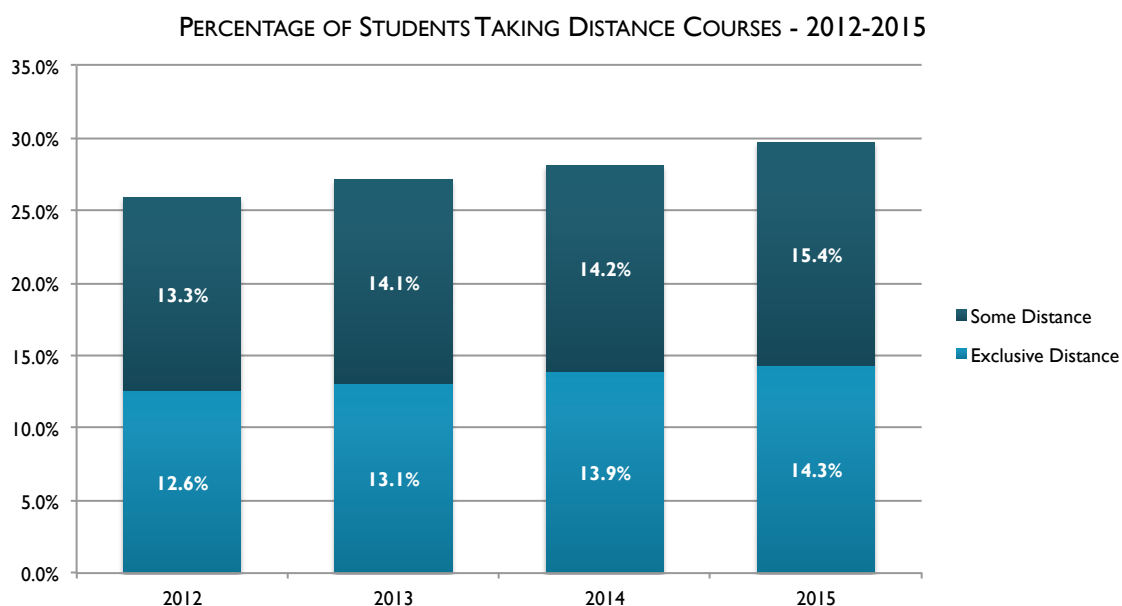


# DISTANCE ENROLLMENTS

## Distance Education Enrollment Growth is Increasing

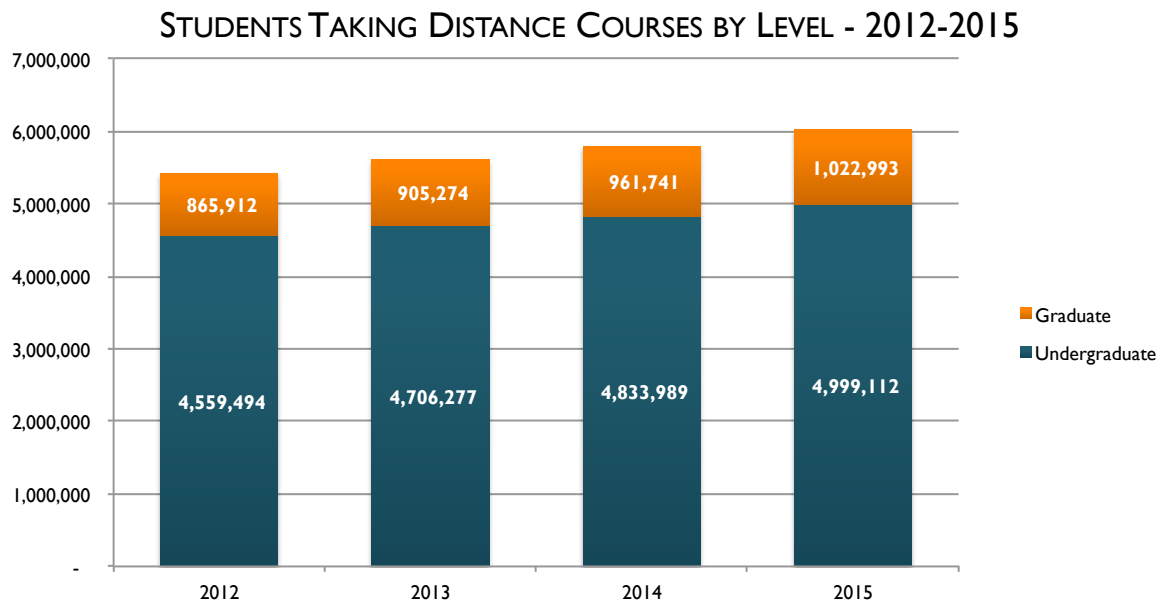
Students who are taking at least one distance education course comprise 29.7% of all higher education enrollments as of fall 2015. This share represents the total of those who are taking all of their courses at a distance, and those who are taking a combination of distance and non-distance courses. The proportion of the higher education student body taking advantage of distance education courses has increased each of the last three years. It stood at 25.9% in 2012, at 27.1% in 2013, and at 28.3% in 2014.

To put these figures in context, the proportion of students taking at least one online course for fall 2002 was under ten percent, at 9.6%<sup>1</sup>. This fraction has grown as institutions introduced online programs and existing distance programs grew their enrollments.



<sup>1</sup> Allen, I.E. and Seaman, J, Grade Change: Tracking Online Education in the United States, Babson Survey Research Group, 2014

The number of students taking at least one distance education course increased 3.9% over the previous year, and grew by 11.0% in the three years since 2012. The 3.9% growth rate exceeds that observed between 2012 and 2013 (3.4%) and between 2013 and 2014 (3.3%). The 6,022,105 total of distance education students for 2015 includes 4,999,112 who are studying at the undergraduate level, and 1,022,993 who are studying at the graduate level.



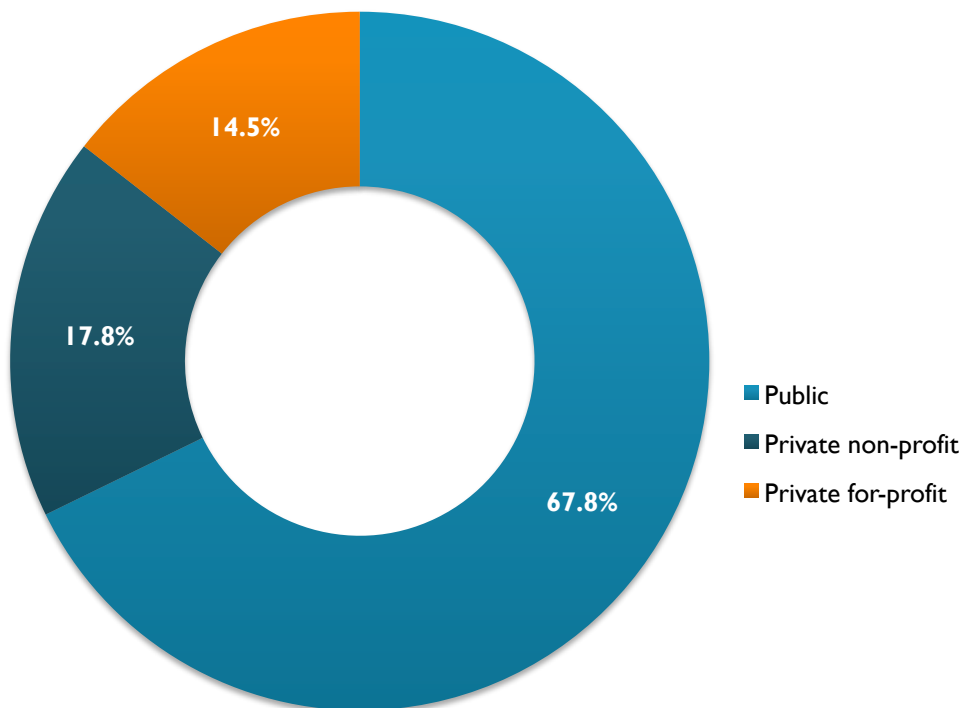
The most recent growth rates are impressive, as they come at a time of decreasing overall enrollments. That said, they remain well below the percentage growth rates observed a decade ago when many institutions were first moving to embrace distance learning. Year to year percentage increases from 2002 to 2012 were typically in double digits, helped by the large numbers of institutions introducing new programs, the growing of the overall student population, and the pent-up demand by students for these types of programs. The smaller base numbers also played a role, as the most recent increase would have translated to a double-digit rate of growth if this same number of additional students had been added to the base of distance students in 2003 or 2004.



## Public Institutions Host Two-thirds of All Distance Learners

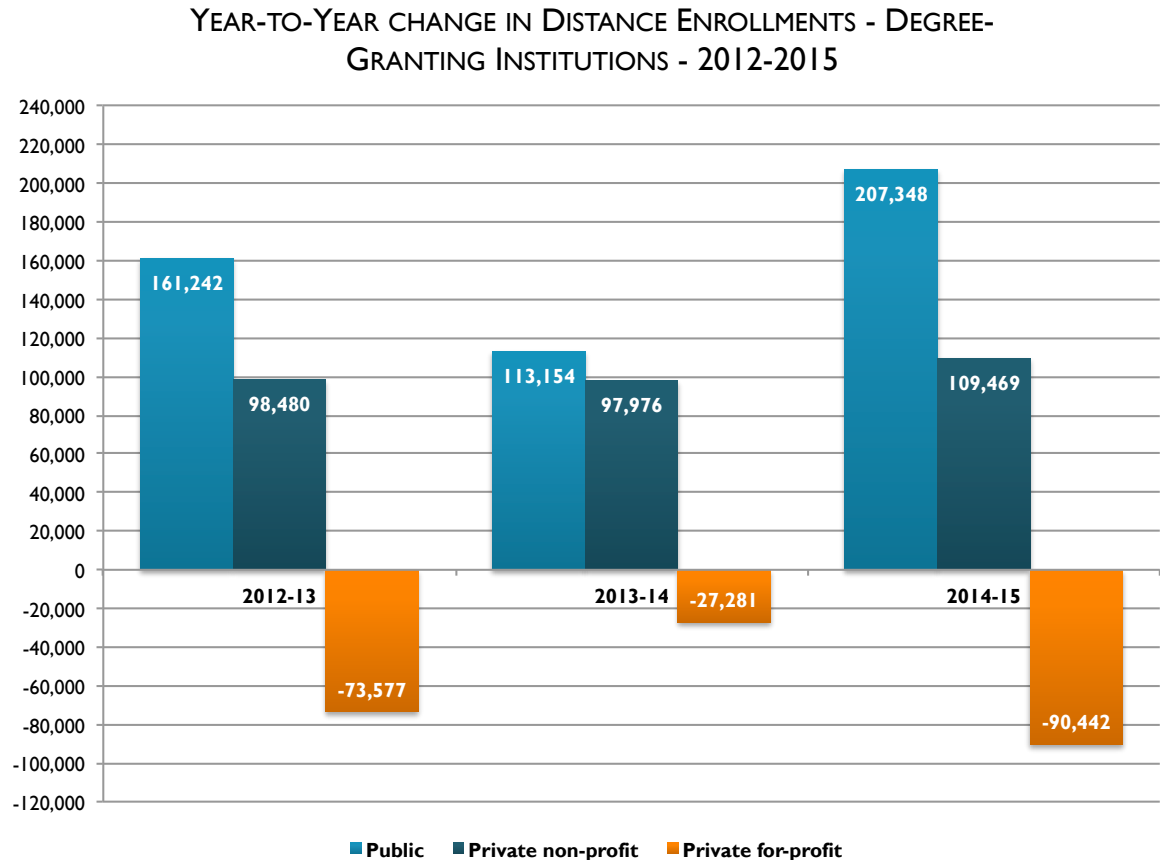
Among all students who were taking at least one distance course in fall 2015, 1,020,622 (17.8%) were at a private non-profit institution, 870,918 (14.5%) were at a for-profit institution, and the vast majority, 4,080,565 (67.8%), were at a public institution. Most distance enrollments at public institutions were at four-year institutions, with 2,254,708 students (55.3%), while 1,825,857 (44.7%) enrolled at two-year institutions. Thus, while the public perception has often equated distance education with the for-profit sector of higher education, public institutions actually command the market.

TYPE OF INSTITUTION - STUDENTS ENROLLED IN DISTANCE  
EDUCATION COURSES - 2015



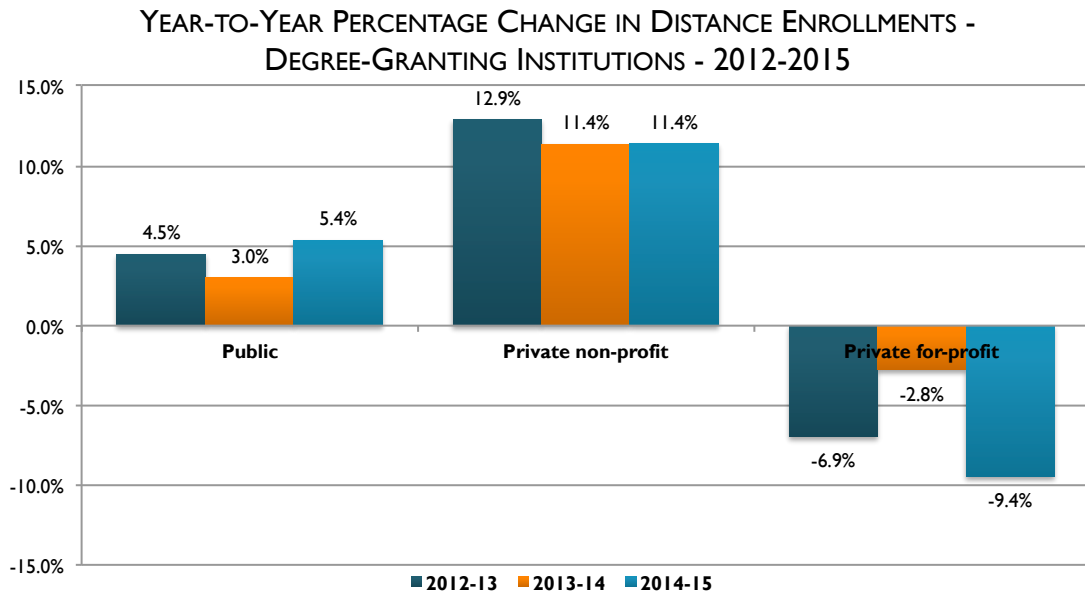
## Changes in Distance Enrollments Have Been Uneven

For each one-year period (2012 to 2013, 2013 to 2014, and 2014 to 2015), the number of distance students at public institutions has shown the greatest numeric increase. For-profit institutions, by contrast, have seen their total distance education enrollments decrease in each of these time periods. The net effect has been an increase every year in the overall number of students taking at least one distance course.



While the year-to-year increases in the number of distance students for the public sector have always been the largest among the three sectors, the size of this advantage has varied from year to year. Public institutions enjoyed their largest enrollment gain advantage during the most recent period, with enrollment growth close to 100,000 more than the increase among private non-profits. The growth among the private non-profit sector has been very steady, with increases hovering around 100,000 additional students each year. The for-profit sector had a decrease in distance enrollments for each period, but these are very uneven, with the largest drop coming in the most recent time period.

Private non-profit institutions have shown the largest percentage change in distance student enrollments, with double-digit percentage increases for each time period. The rate of growth among the public sector was lower than for the private non-profits, but those non-profits began with a lower base. The public growth rate is still higher than the overall level of growth for all distance education students. The clear outlier here is the for-profit sector with decreases noted each year, the most recent being -9.4%.



The 2012 to 2015 growth represents 596,699 additional distance students in 2015 over the number in 2012. Comparing 2015 distance enrollments to data from 2012 highlights the great disparities by sector:

- The non-profit sector experienced tremendous growth (40.0%, or 305,925 students).
- The for-profit sector experienced a significant decrease (-18.0%, or -191,300 students).
- Public institutions continued their history of steady growth (13.4%, or 482,074 students).

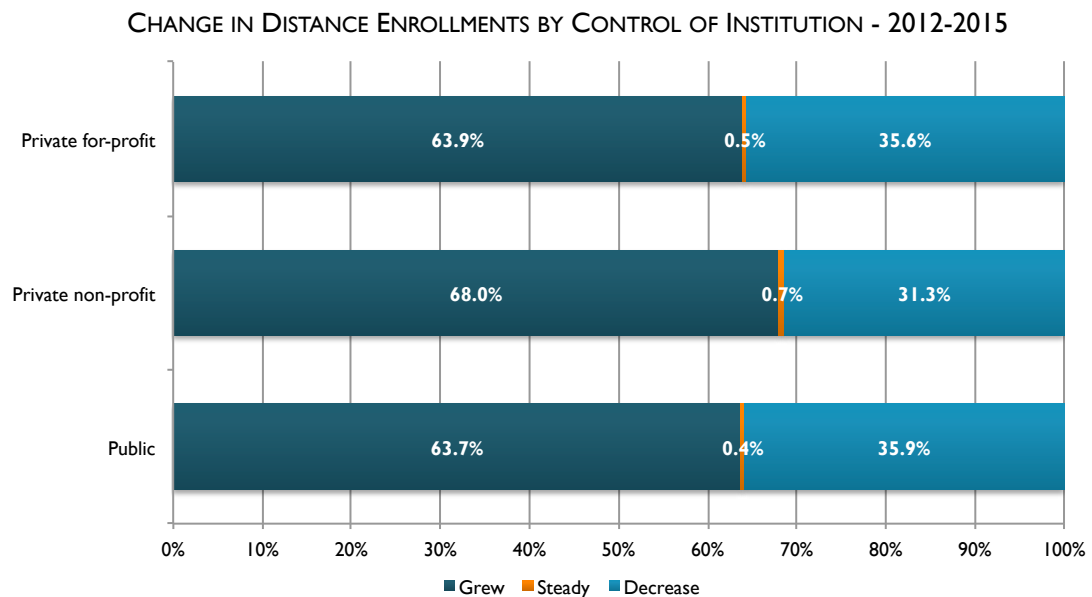
The for-profit sector fell to last place among sectors enrolling the most distance education students. This is a remarkable outcome, considering the for-profit sector led the private, non-profit sector by more than one-quarter million (297,521) enrollments in 2012. In 2015, that difference is now 199,704 students in the other direction.

The declines among for-profit institutions have been overwhelmingly at the undergraduate level; whereas private non-profits have shown substantial growth for both undergraduate and graduate levels. The number of graduate students taking at least one distance education course dropped by only a few thousand between 2012 and 2015 at four-year for-profit institutions, while their number at the undergraduate level showed a decline of 177,735 students. Conversely, distance enrollments at private non-profit institutions grew by a third in their graduate level distance enrollments, and even more for their undergraduate distance students.

<b>Undergraduate Distance Enrollments – 2012-2015</b>				
<i>Sector of institution</i>	<i>Change 2012 to 2015</i>	<i>Percent Change 2012 to 2015</i>	<i>Distance - undergraduate 2012</i>	<i>Distance - undergraduate 2015</i>
<b>Public, 4-year or above</b>	425,714	29.8%	1,428,051	1,853,765
<b>Private non-profit, 4-year or above</b>	197,739	41.7%	474,356	672,095
<b>Private for-profit, 4-year or above</b>	(177,735)	-22.7%	782,697	604,962
<b>Public, 2-year</b>	(11,462)	-0.6%	1,837,319	1,825,857
<b>Private non-profit, 2-year</b>	13,181	460.2%	2,864	16,045
<b>Private for-profit, 2-year</b>	(7,819)	-22.9%	34,207	26,388
<b>Total</b>	439,618	9.6%	4,559,494	4,999,112
<b>Graduate Distance Enrollments – 2012-2015</b>				
<i>Sector of institution</i>	<i>Change 2012 to 2015</i>	<i>Percent Change 2012 to 2015</i>	<i>Distance - graduate 2012</i>	<i>Distance - graduate 2015</i>
<b>Public, 4-year or above</b>	67,822	20.4%	333,121	400,943
<b>Private non-profit, 4-year or above</b>	95,005	33.0%	287,477	382,482
<b>Private for-profit, 4-year or above</b>	(5,746)	-2.3%	245,314	239,568
<b>Total</b>	157,081	18.1%	865,912	1,022,993

All of these large-scale changes mask the variety of experiences happening at the individual institutional level. The rapid growth for the total number of distance enrollments in the non-profit sector, for example, does not mean that all such institutions saw growth. Likewise, the decrease in the total number of distance students among the for-profit sector does not translate to all for-profit institutions losing distance enrollments.

Roughly two-thirds of institutions in all three sectors reported that their distance enrollments increased between 2012 and 2015, with the remaining one-third reporting a decrease. The private non-profit sector did have the greatest proportion of institutions reporting growth, but at 68.0% this is not hugely different from the rate for the other two sectors. The private for-profit sector, where the overall number of distance students dropped every year between 2012 and 2015, had nearly the same proportion of institutions (63.9%) reporting that their enrollments grew. The proportion of for-profit institutions growing was actually ever so slightly higher than that of public institutions. It is clear that the drop in overall number of for-profit distance enrollments has been driven by large losses at a small number of the very biggest institutions – not by an overall decrease across the entire sector.

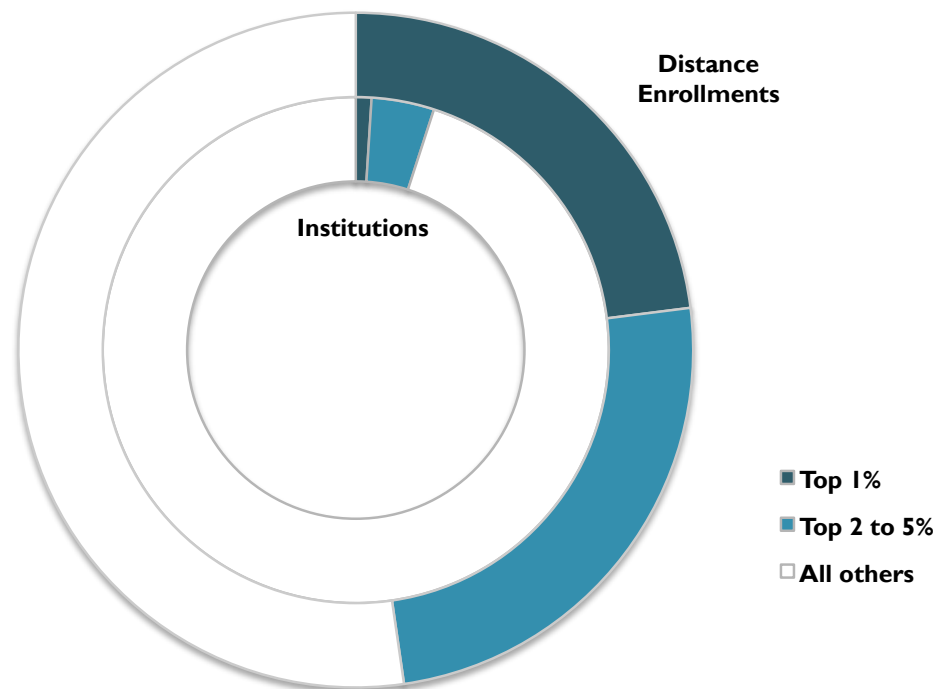


## Distance Enrollments Are Concentrated in Relatively Few Institutions

This report examines data from all 4,836 degree-granting institutions that were active and open to the public in the fall of 2015. Of these, 3,354 (69.3%) institutions reported having at least one distance education student. The 6,022,105 distance education students are not equally distributed among all institutions.

Students enrolled in distance education are highly concentrated in a relatively small number of institutions. Almost half of distance education students are concentrated in just 5% of institutions: the 235 institutions that represent only 5.0% of the higher education universe command 47.7% (2,873,710) of the student distance enrollments. The top 47 institutions represent only 1.0% of all institutions, yet they enroll 23.0% (1,385,307) of all distance enrollments. A mere 9 institutions account for over 10% of all distance education enrollments, representing only 0.19% of higher education institutions.

### CONCENTRATION OF DISTANCE ENROLLMENTS AMONG THE TOP 5 PERCENT OF INSTITUTIONS



<b>Concentration of Distance Enrollments - 2015</b>			
<b><i>Number of Institutions</i></b>	<b><i>Percentage of Institutions</i></b>	<b><i>Distance Enrollments</i></b>	<b><i>Percentage of Distance Enrollments</i></b>
<b>9</b>	0.19%	615,045	10.2%
<b>47</b>	1.0%	1,385,307	23.0%
<b>235</b>	5.0%	2,873,710	47.7%
<b>471</b>	10.0%	3,845,675	63.9%
<b>3,354</b>	69.3%	6,022,105	100.0%
<b>4,836</b>	100.0%	6,022,105	100.0%

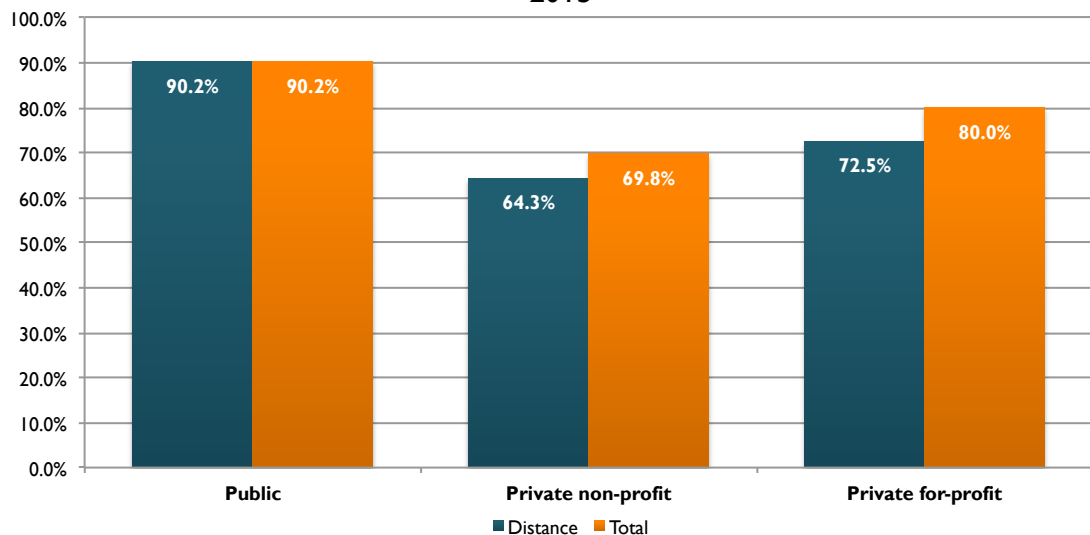
An important implication of this high degree of distance enrollment concentration is that decisions of a relatively small number of academic leaders will have a very large impact on the overall distance education universe. For example, the opinions of key leaders among the top 471 institutions (the top 10%) on how they market and evolve their distance programs will impact nearly two-thirds of all distance students. From the student perspective, the concentration of large numbers of students in a small number of schools means that most distance students are enrolled in institutions with large numbers of fellow distance classmates.



## Distance Enrollments Are Primarily Undergraduate

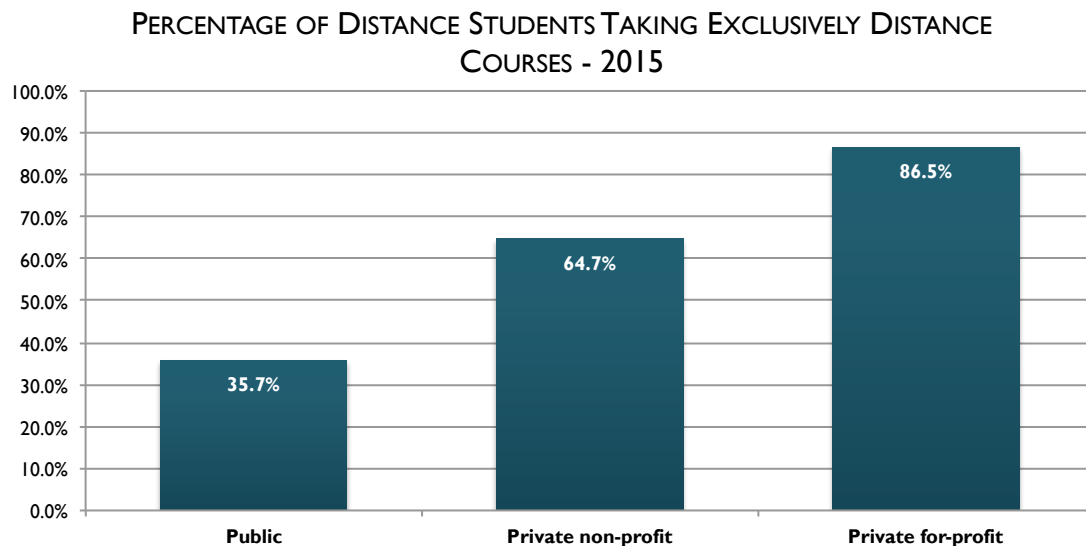
There are nearly five times as many undergraduate enrollments (4,999,112) as graduate enrollments (1,022,993) among students taking at least one distance education course. The proportion of undergraduates (83.0%) among students taking at last one distance course is only slightly less than the proportion among the overall higher education population (85.3%). The proportion of undergraduate distance students is highest at public institutions (90.2%), a figure that exactly matches the proportion of their overall student body that is made up of undergraduates. Other types of institutions have a somewhat smaller proportion of undergraduates among their distance students than their overall student body, with for-profit institutions having 72.5% undergraduate among distance students, and 80.0% for the full student body. Similarly, private non-profit institutions have 64.3% undergraduates among their distance students as compared to 69.8% overall.

DISTANCE AND TOTAL ENROLLMENTS PERCENTAGE UNDERGRADUATE -  
2015



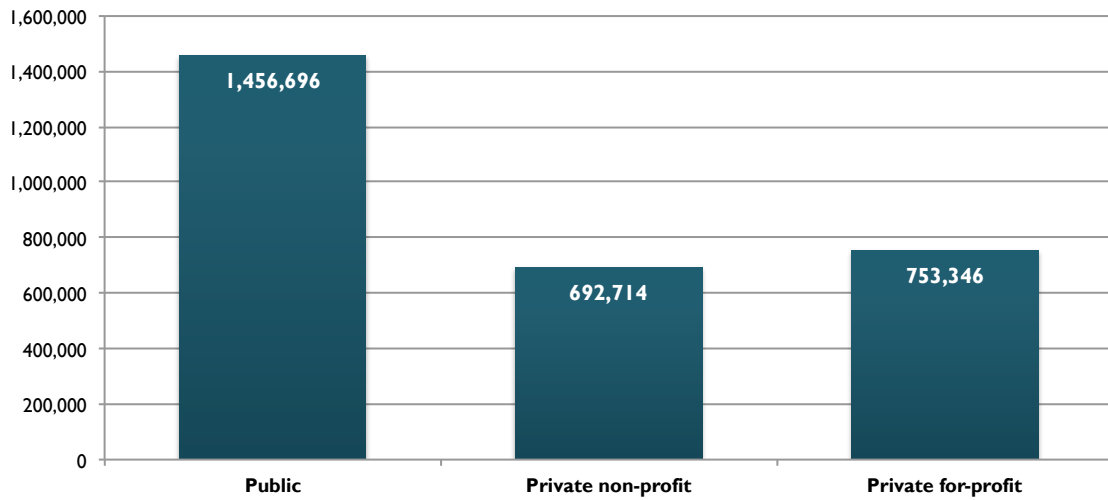
## Students Taking Exclusively Distance Courses

Slightly less than one-half of students taking at least one distance course are taking *only* distance courses (48.2%, or 2,902,756 out of 6,022,105). Approximately one-half of these exclusively distance students are enrolled at public institutions, with the remaining portion evenly split between non-profit and for-profit institutions. While public institutions host the majority of exclusively distance students, they make up a much smaller portion of their “at least one” distance enrollments than found at other institution types. Only 35.7% of all distance students at public institutions are taking exclusively distance courses. This compares to 64.7% at private non-profit institutions and 86.5% at private for-profit institutions. Clearly both of the private sectors have decided on an increased focus on the “fully” distance student.



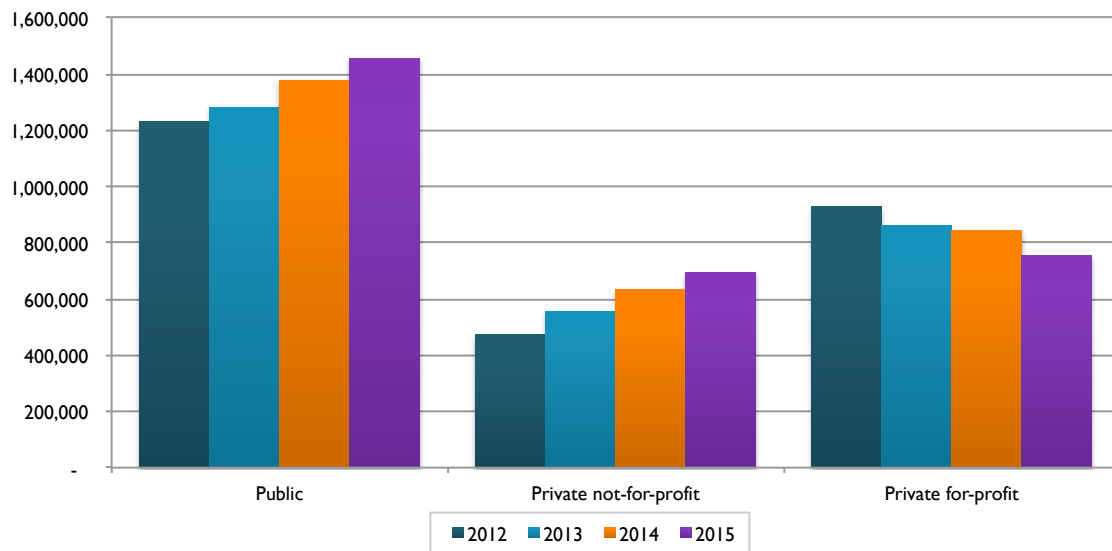
While both the private for-profit and the private non-profit sectors have larger proportions of their students taking exclusively distance courses, the public sector has a very large base of distance students, resulting in a population of about as many exclusively distance students as the other two sectors combined. With over 4 million distance students, even a low percentage yields a sizable total.

### NUMBER OF STUDENTS TAKING EXCLUSIVELY DISTANCE COURSES - 2015



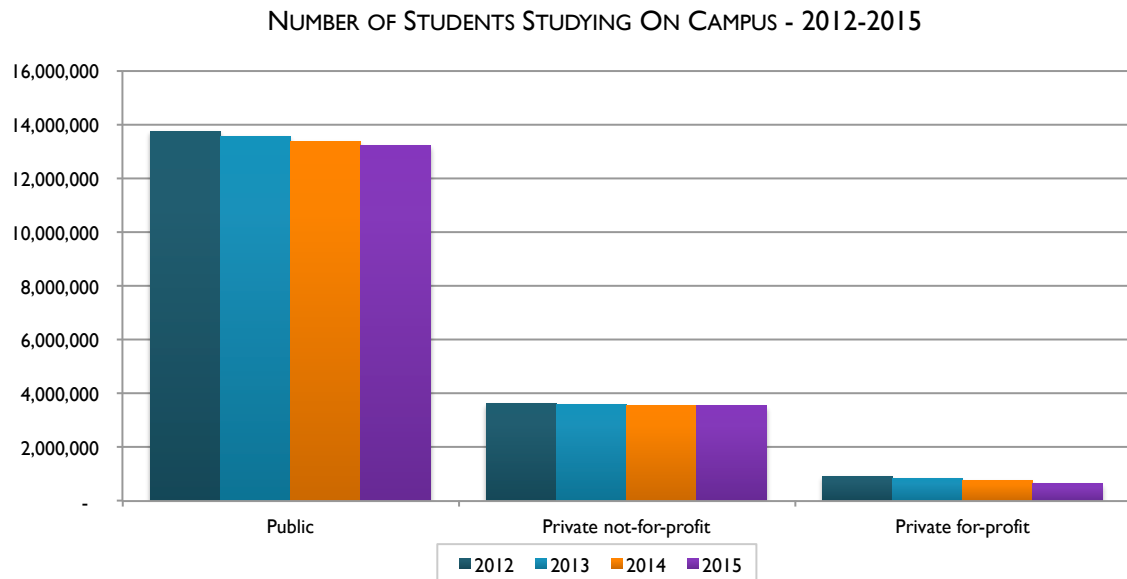
As has been the case with the other year-to-year comparisons of distance enrollments, the pattern of change over time of exclusively distance student enrollments is very different in the for-profit sector than in the other two sectors. For-profit institutions lost students taking exclusively distance courses for each time period examined, while public and private non-profit institutions had gains for each of these periods. Both the public and private non-profit institutions gained over 200,000 such students between 2012 and 2015, while the private for-profits lost 174,553.

### NUMBER OF STUDENTS TAKING EXCLUSIVELY DISTANCE COURSES - 2012-2015



## The On-campus Student

The growth in the number of students who are taking only distance courses, coupled with the overall decline in the overall number of students enrolled, has resulted in far fewer students on campus in 2015 than in 2012. The total number of students who are physically on campus (those not taking any distance course or taking a combination of distance and non-distance courses) dropped by almost one million students (931,317) over this time period.



Change in Number of On Campus Students – 2012 to 2015		
<i>Control of institution</i>	<i>Change 2012 to 2015</i>	<i>Percent Change 2012 to 2015</i>
<b>Public</b>	(539,271)	-3.93%
<b>Private non-profit</b>	(100,863)	-2.78%
<b>Private for-profit</b>	(291,183)	-31.36%
<b>Total</b>	(931,317)	-5.09%

Private for-profit institutions began the period with less than a million total students on campus (928,639 of their total of 1,856,538 students in fall 2012), and had the largest percentage change, with a decrease of 31.4%. Public institutions lost far more on-campus students (down 539,271 between 2012 and 2015), but this is from a much larger base and represents only a 3.9% decrease.

The rate of decrease among for-profit institutions was similar for both the four-year and two-year schools, with both reporting the same 31.4% decrease. The picture is very different at public institutions, however, where four-year public institutions remained relatively stable (a small percentage increase) but two-year public institutions lost 10.4% of their on-campus enrollments.

<b>On Campus Students – 2012 to 2015</b>		
<i>Sector of institution</i>	<i>Change 2012 to 2015</i>	<i>Percent Change 2012 to 2015</i>
<b>Public, 4-year or above</b>	101,445	1.3%
<b>Private non-profit, 4-year or above</b>	(113,063)	-3.1%
<b>Private for-profit, 4-year or above</b>	(181,680)	-31.4%
<b>Public, 2-year</b>	(640,716)	-10.4%
<b>Private non-profit, 2-year</b>	12,200	32.2%
<b>Private for-profit, 2-year</b>	(109,503)	-31.4%
<b>Total</b>	(931,317)	-5.1%

## Understanding the Key Players – The Top 50 Institutions in 2012

To get a better understanding of the dynamics of the distance education market we can examine the top players (by number of distance enrollments) in both 2012 and 2015. As noted above, distance enrollments are highly concentrated in a small number of institutions, so while an examination of the top 50 institutions in any given year reflects only one percent of all high education institutions, they do represent over one-quarter of all distance enrollments.

In 2012 the top 50 institutions by distance enrollments reported a total of 1,453,709 students taking at least one distance course – this represented 26.8% of all distance enrollments at that time.

These top 50 in 2012 are composed of 27 public institutions (with a total of 513,842 distance enrollments, 10 private non-profit institutions (258,164) and 13 private for-profit institutions (681,703). The University of Phoenix is by far the largest, with 256,346 distance enrollments. Southern New Hampshire University sits in 50<sup>th</sup> position, with 11,286 distance enrollments.

The private for-profit institutions on the list are all very focused on distance education: their distance enrollments represent 98.4% of their overall enrollments. The private non-profit institutions are only slightly less focused on distance education (83.8% of their enrollments are at a distance). Public institutions on the list are very different, however. Among these 27 institutions, the distance enrollments represent less than one half (46.2%) of their overall enrollments.

# Top 50 Institutions by Number of Students Taking at Least One Distance Course - 2012

Rank	Institution	ST	2012 Total Enroll- ment	2012 Distance Students	Percent Distance	Control
1	University of Phoenix	AZ	256,402	256,346	100.0%	Private for-profit
2	Ashford University	CA	77,734	76,722	98.7%	Private for-profit
3	Liberty University	VA	74,372	69,935	94.0%	Private non-profit
4	American Public University System	WV	58,115	58,115	100.0%	Private for-profit
5	Walden University	MN	50,209	50,209	100.0%	Private for-profit
6	Kaplan University-Davenport Campus	IA	48,865	46,374	94.9%	Private for-profit
7	Grand Canyon University	AZ	48,650	44,006	90.5%	Private for-profit
8	Ivy Tech Community College	IN	100,272	42,821	42.7%	Public
9	University of Maryland-University College	MD	42,268	42,165	99.8%	Public
10	Western Governors University	UT	41,369	41,369	100.0%	Private non-profit
11	Excelsior College	NY	39,728	39,728	100.0%	Private non-profit
12	Arizona State University-Tempe	AZ	73,378	36,095	49.2%	Public
13	Capella University	MN	35,754	35,754	100.0%	Private for-profit
14	Everest University-South Orlando	FL	33,852	33,239	98.2%	Private non-profit
15	Pima Community College	AZ	32,988	27,677	83.9%	Public
16	Florida International University	FL	46,171	25,028	54.2%	Public
17	Full Sail University	FL	23,497	23,486	100.0%	Private for-profit
18	University of Florida	FL	49,913	23,180	46.4%	Public
19	Colorado Technical University-Online	CO	22,608	22,608	100.0%	Private for-profit
20	University of Central Florida	FL	59,601	21,782	36.5%	Public
21	DeVry University-Illinois	IL	24,246	21,616	89.2%	Private for-profit
22	Thomas Edison State University	NJ	20,606	20,456	99.3%	Public
23	Columbia Southern University	AL	19,933	19,933	100.0%	Private for-profit
24	Northern Virginia Community College	VA	51,864	19,152	36.9%	Public
25	Lone Star College System	TX	64,872	18,602	28.7%	Public
26	Houston Community College	TX	58,476	17,524	30.0%	Public
27	Rio Salado College	AZ	24,342	16,902	69.4%	Public
28	St Petersburg College	FL	32,612	16,669	51.1%	Public
29	CUNY Borough of Manhattan Community College	NY	24,537	16,546	67.4%	Public
30	University of South Florida-Main Campus	FL	41,116	16,241	39.5%	Public
31	Troy University	AL	22,554	15,444	68.5%	Public
32	Nova Southeastern University	FL	26,808	14,983	55.9%	Private non-profit
33	American InterContinental University-Online	IL	14,170	14,170	100.0%	Private for-profit
34	Valencia College	FL	42,915	13,985	32.6%	Public
35	College of Southern Nevada	NV	35,678	13,270	37.2%	Public
36	Pennsylvania State University-Main Campus	PA	45,783	13,238	28.9%	Public
37	Tidewater Community College	VA	30,134	13,164	43.7%	Public
38	National University	CA	17,898	12,775	71.4%	Private non-profit
39	Northern Arizona University	AZ	25,991	12,544	48.3%	Public
40	Cuyahoga Community College District	OH	29,701	12,418	41.8%	Public
41	South University Savannah Online	GA	12,364	12,364	100.0%	Private for-profit
42	Tarrant County College District	TX	50,439	12,290	24.4%	Public
43	Wake Technical Community College	NC	20,440	11,853	58.0%	Public
44	Portland Community College	OR	33,767	11,822	35.0%	Public
45	Brigham Young University-Idaho	ID	23,261	11,763	50.6%	Private non-profit
46	Columbia College	MO	17,830	11,718	65.7%	Private non-profit
47	Columbus State Community College	OH	25,863	11,558	44.7%	Public
48	Middle Tennessee State University	TN	25,394	11,416	45.0%	Public
49	Embry-Riddle Aeronautical University-Worldwide	FL	15,562	11,368	73.0%	Private non-profit
50	Southern New Hampshire University	NH	17,454	11,286	64.7%	Private non-profit



## Understanding the key players – The Top 50 Institutions in 2015

A listing of the top 50 institutions by distance education enrollments in 2015 includes many of the same names as were present in 2013, with considerable changes. Virtually all who remained on the list find themselves in a different position than the one they were in 3 years earlier. Of the 50 schools with the largest distance enrollments in 2012, 17 were replaced by faster growing institutions in 2015.

Several of the largest enrollment institutions remained at the top of the list. The University of Phoenix is number 1 on both lists (albeit with considerably lower enrollments in 2015), and Liberty University has remained near the top, rising from number 3 in 2012 to number 2 in 2015. Many of the other top institutions in 2015 came from much further down the list. Southern New Hampshire University moved from number 50 in 2012 to number 4 in 2015, while Western Governors University moved up from number 10 to number 2.

Other large movers were Brigham Young University-Idaho, up 31 places from 45 to 14, Thomas Edison State University dropping 18 places from 22 to 40, and Northern Virginia Community College dropping 14 places from 38 to 24. Only 4 institutions in the top 50 in 2012 were in the same place on the 2015 list. Most institutions that are present on both lists changed by 3 or more places between 2012 and 2015.

The level of concentration of distance education enrollments was slightly reduced between 2012 and 2015. In 2012 the top 50 represented 26.8% of all distance enrollments. In 2015, the total of 1,422,136 distance students accounted for by the top 50 represented only 23.6%. This still represents a high degree of concentration, though not as extreme as three years earlier.

The number of public institutions on the top 50 list increased from 27 in 2012 to 30 in 2015, and the proportion of their students studying at a distance remained the lowest of the three sectors (46.2% in both 2012 and 2015). The number of private for-profit institutions on the list decreased by one from 13 to 12, and the proportion of distance students remained very high, dropping from 98.4% in 2012 to 96.1% in 2015. The number of private non-profit institutions on the list dropped by two, from 10 to 8, while the proportion distance education students among these 8 institutions was 92.4%, up from the 83.8% figure in 2012.

# Top 50 Institutions by Number of Students Taking at Least One Distance Course - 2015

Rank	Institution	ST	2015 Total Enrollment	2015 Distance Students	Percent Distance	Control
1	University of Phoenix-Arizona	AZ	165,743	162,003	97.7%	Private for-profit
2	Liberty University	VA	80,494	72,519	90.1%	Private non-profit
3	Western Governors University	UT	70,504	70,504	100.0%	Private non-profit
4	Southern New Hampshire University	NH	61,285	56,371	92.0%	Private non-profit
5	Grand Canyon University	AZ	69,444	54,543	78.5%	Private for-profit
6	Walden University	MN	52,799	52,799	100.0%	Private for-profit
7	American Public University System	WV	52,361	52,361	100.0%	Private for-profit
8	University of Maryland-University College	MD	50,248	48,677	96.9%	Public
9	Kaplan University-Davenport Campus	IA	45,355	45,268	99.8%	Private for-profit
10	Excelsior College	NY	43,123	43,123	100.0%	Private non-profit
11	Ashford University	CA	42,452	42,046	99.0%	Private for-profit
12	Capella University	MN	34,365	34,365	100.0%	Private for-profit
13	Ivy Tech Community College	IN	81,668	34,103	41.8%	Public
14	Brigham Young University-Idaho	ID	43,803	33,551	76.6%	Private non-profit
15	University of Central Florida	FL	62,953	33,034	52.5%	Public
16	University of Florida	FL	50,645	28,838	56.9%	Public
17	Florida International University	FL	49,782	26,341	52.9%	Public
18	Arizona State University-Tempe	AZ	51,984	22,809	43.9%	Public
19	Colorado Technical University-Online	CO	22,757	22,757	100.0%	Private for-profit
20	Chamberlain College of Nursing-Illinois	IL	23,250	22,114	95.1%	Private for-profit
21	Lone Star College System	TX	70,724	21,811	30.8%	Public
22	University of South Florida-Main Campus	FL	42,067	20,993	49.9%	Public
23	Columbia Southern University	AL	20,823	20,823	100.0%	Private for-profit
24	DeVry University-Illinois	IL	22,273	20,458	91.9%	Private for-profit
25	Full Sail University	FL	20,025	19,939	99.6%	Private for-profit
26	Houston Community College	TX	56,522	19,111	33.8%	Public
27	Arizona State University-SkySong	AZ	20,273	19,094	94.2%	Public
28	The University of Texas at Arlington	TX	41,988	17,541	41.8%	Public
29	Valencia College	FL	44,050	17,216	39.1%	Public
30	American College of Financial Services	PA	16,764	16,764	100.0%	Private non-profit
31	St Petersburg College	FL	31,767	16,501	51.9%	Public
32	California State University-Northridge	CA	41,548	16,130	38.8%	Public
33	College of Southern Nevada	NV	33,313	14,906	44.7%	Public
34	Texas Tech University	TX	35,859	14,826	41.3%	Public
35	Pennsylvania State University-Main Campus	PA	47,307	14,355	30.3%	Public
36	University of Cincinnati-Main Campus	OH	36,042	13,992	38.8%	Public
37	Kent State University at Kent	OH	30,067	13,754	45.7%	Public
38	Northern Virginia Community College	VA	52,078	13,421	25.8%	Public
39	Utah State University	UT	28,622	13,360	46.7%	Public
40	Thomas Edison State University	NJ	13,093	13,093	100.0%	Public
41	University of Houston	TX	42,704	12,961	30.4%	Public
42	Florida State University	FL	40,830	12,858	31.5%	Public
43	Embry-Riddle Aeronautical University	FL	13,740	12,857	93.6%	Private non-profit
44	University of Iowa	IA	30,844	12,784	41.4%	Public
45	Wilmington University	DE	15,002	12,745	85.0%	Private non-profit
46	University of North Texas	TX	37,299	12,517	33.6%	Public
47	University of Alabama at Birmingham	AL	18,333	12,371	67.5%	Public
48	North Carolina State University at Raleigh	NC	34,015	12,321	36.2%	Public
49	Cuyahoga Community College District	OH	25,449	12,266	48.2%	Public
50	Pennsylvania State University-World Campus	PA	12,242	12,242	100.0%	Public

## Understanding the Key Players – Change in the Top 50 Institutions 2012-15

There are a variety of dynamics at play across the distance education universe with different factors impacting the enrollment changes at different institutions. The forces at work at the few very large private for-profit institutions are different from those that are driving most other for-profit institutions. In 2015, after three years, these top 50 institutions from 2012 reported only 1,338,514 distance students, a decrease of 115,195 (or 7.9%) from their 2012 distance enrollments. The pattern of change was extremely varied. Southern New Hampshire University (a private non-profit) led the list with an increase of just under 400% (growing by 45,085 from 11,286 to 56,371). Four other institutions grew their distance enrollments by more than 10,000 students during this period: Western Governors University, Brigham Young University-Idaho, University of Central Florida, and Grand Canyon University. The University of Maryland-College Park and the University of Florida each added over 5,000 distance students. The University of South Florida-Main Campus and Valencia College did not reach the 5,000-student mark but did grow their enrollments by nearly 25%.

On the other end of the scale were the University of Phoenix (down 93,343 from 256,346 to 162,003 for a 36.8% decline) and Ashford University (down 34,676 from 76,722 to 42,046 for a 45.2% decline). These two institutions, with a combined loss of 129,019 distance students, account for more than the entire drop (115,195) among these 50 institutions.

It is important to note, however, that these numbers are derived from IPEDS fall enrollment data, which are not always an accurate reflection of the full nature of enrollment changes. Thomas Edison State University is one such example. As an institution without regular “fall” or “spring” terms, the normal IPEDS definitions are not a good fit. The reported 2012 to 2015 decrease of 7,363 students reflects a definitional change from an annual number in 2012 to a “fall only” number in 2015. If the 2015 data had used the same approach as 2012 the decline would have been a much smaller 1,773 students. Other changes in IPEDS reporting approaches (e.g., a multi-campus institution changing which campus they consider “home” for distance students) can also result in reported counts that do not reflect actual changes in enrollments.

# Distance Enrollment Change 2012 to 2015 - Top 50 Distance Enrollments 2012

<i>Institution</i>	<i>ST</i>	<i>2012</i>	<i>2015</i>	<i>Change 2012-15</i>	<i>Control</i>
Southern New Hampshire University	NH	11,286	56,371	45,085	Private non-profit
Western Governors University	UT	41,369	70,504	29,135	Private non-profit
Brigham Young University-Idaho	ID	11,763	33,551	21,788	Private non-profit
University of Central Florida	FL	21,782	33,034	11,252	Public
Grand Canyon University	AZ	44,006	54,543	10,537	Private for-profit
University of Maryland-University College	MD	42,165	48,677	6,512	Public
University of Florida	FL	23,180	28,838	5,658	Public
University of South Florida-Main Campus	FL	16,241	20,993	4,752	Public
Excelsior College	NY	39,728	43,123	3,395	Private non-profit
Valencia College	FL	13,985	17,216	3,231	Public
Lone Star College System	TX	18,602	21,811	3,209	Public
Walden University	MN	50,209	52,799	2,590	Private for-profit
Liberty University	VA	69,935	72,519	2,584	Private non-profit
College of Southern Nevada	NV	13,270	14,906	1,636	Public
Houston Community College	TX	17,524	19,111	1,587	Public
Embry-Riddle Aeronautical University-	FL	11,368	12,857	1,489	Private non-profit
Florida International University	FL	25,028	26,341	1,313	Public
Pennsylvania State University-Main Campus	PA	13,238	14,355	1,117	Public
Columbia Southern University	AL	19,933	20,823	890	Private for-profit
Columbus State Community College	OH	11,558	11,907	349	Public
Colorado Technical University-Online	CO	22,608	22,757	149	Private for-profit
Cuyahoga Community College District	OH	12,418	12,266	(152)	Public
St Petersburg College	FL	16,669	16,501	(168)	Public
National University	CA	12,775	12,116	(659)	Private non-profit
Northern Arizona University	AZ	12,544	11,769	(775)	Public
Portland Community College	OR	11,822	10,849	(973)	Public
Kaplan University-Davenport Campus	IA	46,374	45,268	(1,106)	Private for-profit
DeVry University-Illinois	IL	21,616	20,458	(1,158)	Private for-profit
Capella University	MN	35,754	34,365	(1,389)	Private for-profit
South University Savannah Online	GA	12,364	10,781	(1,583)	Private for-profit
Columbia College	MO	11,718	9,870	(1,848)	Private non-profit
Tarrant County College District	TX	12,290	10,377	(1,913)	Public
American InterContinental University-Online	IL	14,170	11,560	(2,610)	Private for-profit
Nova Southeastern University	FL	14,983	12,147	(2,836)	Private non-profit
Tidewater Community College	VA	13,164	9,989	(3,175)	Public
Wake Technical Community College	NC	11,853	8,642	(3,211)	Public
Full Sail University	FL	23,486	19,939	(3,547)	Private for-profit
Rio Salado College	AZ	16,902	12,092	(4,810)	Public
Middle Tennessee State University	TN	11,416	6,088	(5,328)	Public
Northern Virginia Community College	VA	19,152	13,421	(5,731)	Public
American Public University System	W	58,115	52,361	(5,754)	Private for-profit
Troy University	AL	15,444	8,824	(6,620)	Public
Thomas Edison State University	NJ	20,456	13,093	(7,363)	Public
Ivy Tech Community College	IN	42,821	34,103	(8,718)	Public
Arizona State University-Tempe	AZ	36,095	22,809	(13,286)	Public
CUNY Borough of Manhattan Community	NY	16,546	1,465	(15,081)	Public
Pima Community College	AZ	27,677	7,425	(20,252)	Public
Everest University-South Orlando	FL	33,239	8,851	(24,388)	Private non-profit
Ashford University	CA	76,722	42,046	(34,676)	Private for-profit
University of Phoenix	AZ	256,346	162,003	(94,343)	Private for-profit

# METHODOLOGY

The sample for this analysis is comprised of all active, degree-granting institutions of higher education in the United States that are open to the public.

The enrollment data for this report uses information from the U.S. Department of Education's National Center for Educational Statistics (NCES) Integrated Postsecondary Education Data System (IPEDS) database<sup>2</sup>. IPEDS is a national census of postsecondary institutions in the U.S., which represents the most comprehensive data available. 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.

In February 2017, NCES released the fourth year of IPEDS Fall Enrollment data that includes distance education enrollments. In addition, IPEDS data is occasionally revised, and the enrollment data for fall 2014 represent one such revised data set. The enrollment figures in this report use the recently released revised data for fall 2014 and will therefore vary slightly from those previously published, including those in prior reports from the Digital Learning Compass members. Institutional descriptive data for the current year also come from the National Center for Educational Statistics' IPEDS database.

The focus of this report is the distance education data that has been collected by IPEDS for the fall 2012, fall 2013, fall 2014 and fall 2015 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 definitions provided by the IPEDS survey.

Previous reports from the Babson Survey Research Group that predate IPEDS distance education enrollment data used a somewhat different definition. The BSRG measure of "online offerings" was defined as broadly as possible; any offering of any length to any audience at any time. IPEDS takes a much narrower view. For example, IPEDS counts undergraduate offerings for "a student enrolled in a 4- or 5-year bachelor's degree program, an associate's degree program, or a vocational or technical program below the baccalaureate."<sup>3</sup> Non-credit courses (e.g., courses for continuing education units that are not credit-bearing, informational courses for alumni, and non-credit MOOCs) do not qualify for the IPEDS definition.

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<sup>2</sup> <http://nces.ed.gov/ipeds/datacenter/DataFiles.aspx>

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

# TABLES

## Overall Higher Education Enrollment

### TOTAL ENROLLMENT - DEGREE-GRANTING INSTITUTIONS - 2012-2015

	2012	2013	2014	2015
Overall enrollment	20,928,443	20,680,352	20,508,530	20,266,367
Year to year change		(248,091)	(171,822)	(242,163)
Year to year % change		-1.2%	-0.8%	-1.2%
2012 to 2015 change				(662,076)
2012 to 2015 % change				-3.2%

### DISTANCE ENROLLMENT - DEGREE-GRANTING INSTITUTIONS - 2012-2015

	2012	2013	2014	2015
At least one distance course	5,425,406	5,611,551	5,795,730	6,022,105
Year to year change		186,145	184,179	226,375
Year to year % change		3.4%	3.3%	3.9%
2012 to 2015 change				596,699
2012 to 2015 % change				11.0%

### TOTAL ENROLLMENT - DEGREE-GRANTING INSTITUTIONS - 2012-2015

Control of institution	2012	2013	2014	2015
Public	14,966,033	14,826,098	14,735,282	14,651,642
Private non-profit	4,105,872	4,152,060	4,166,587	4,223,923
Private for-profit	1,856,538	1,702,194	1,606,661	1,390,802
Total	20,928,443	20,680,352	20,508,530	20,266,367

**PERCENTAGE CHANGE IN TOTAL ENROLLMENT - DEGREE-GRANTING INSTITUTIONS - 2012-2015**

<i>Level of institution</i>	<i>Percentage Change 2012 - 2015</i>	<i>Change 2012 - 2015</i>	<i>2012 Enrollment</i>	<i>2015 Enrollment</i>
Undergraduate: 4 year school	0.0%	4,920	10,763,773	10,758,853
Undergraduate: 2 year school	-9.5%	688,887	7,214,275	6,525,388
Graduate	1.1%	-31,731	2,950,395	2,982,126

**TOTAL ENROLLMENT BY CONTROL OF INSTITUTION - 2015**

<i>Control of institution</i>	<i>2015</i>
Public	14,651,642
Private non-profit	4,223,923
Private for-profit	1,390,802
Total	20,266,367

**TOTAL ENROLLMENT BY SIZE OF INSTITUTION - 2015**

<i>Overall enrollment 2015</i>	<i>Total - All students 2015</i>
Under 1,500	1,236,336
1,500 - 2,999	1,507,703
3,000 - 7,499	3,608,498
7,500 - 14,999	4,586,969
15,000 +	9,326,861
Total	20,266,367



## Distance Enrollments

### PERCENTAGE OF STUDENTS TAKING DISTANCE COURSES - 2012-2015

	2012	2013	2014	2015
Exclusive Distance	12.6%	13.1%	13.9%	14.3%
Some Distance	13.3%	14.1%	14.2%	15.4%

### STUDENTS TAKING DISTANCE COURSES BY LEVEL - 2012-2015

<i>Control of institution</i>	2012	2013	2014	2015
Undergraduate	4,559,494	4,706,277	4,833,989	4,999,112
Graduate	865,912	905,274	961,741	1,022,993
Total	5,425,406	5,611,551	5,795,730	6,022,105

### TYPE OF INSTITUTION - STUDENTS ENROLLED IN DISTANCE EDUCATION COURSES - 2015

<i>Control of institution</i>	<i>Distance All 2015</i>
Public	4080565
Private non-profit	1070622
Private for-profit	870918

### YEAR-TO-YEAR CHANGE IN DISTANCE ENROLLMENTS - DEGREE-GRANTING INSTITUTIONS - 2012-2015

	2012-13	2013-14	2014-15
Public	161242	113154	207348
Private non-profit	98480	97976	109469
Private for-profit	-73577	-27281	-90442

**YEAR-TO-YEAR PERCENTAGE CHANGE IN DISTANCE ENROLLMENTS - DEGREE-GRANTING INSTITUTIONS - 2012-2015**

	<i>2012-13</i>	<i>2013-14</i>	<i>2014-15</i>
Public	4.5%	3.0%	5.4%
Private non-profit	12.9%	11.4%	11.4%
Private for-profit	-6.9%	-2.8%	-9.4%

**DISTANCE AND TOTAL ENROLLMENTS PERCENTAGE UNDERGRADUATE - 2015**

<i>Control of institution</i>	<i>Distance</i>	<i>Total</i>
Public	90.2%	90.2%
Private non-profit	64.3%	69.8%
Private for-profit	72.5%	80.0%
Total	83.0%	85.3%

**PERCENTAGE OF DISTANCE STUDENTS TAKING EXCLUSIVELY DISTANCE COURSES - 2015**

<i>Control of institution</i>	<i>Distance - total - exclusively distance 2015</i>
Public	35.7%
Private non-profit	64.7%
Private for-profit	86.5%

**NUMBER OF STUDENTS TAKING EXCLUSIVELY DISTANCE COURSES - 2015**

<i>Control of institution</i>	<i>Distance - total - exclusively distance 2015</i>
Public	1,456,696
Private non-profit	692,714
Private for-profit	753,346

**NUMBER OF STUDENTS TAKING EXCLUSIVELY DISTANCE COURSES - 2012-2015**

<i>Control of institution</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>
Public	1,231,816	1,282,687	1,378,395	1,456,696
Private not-for-profit	473,800	556,434	632,660	692,714
Private for-profit	927,899	862,563	844,143	753,346
Total	2,633,515	2,701,684	2,855,198	2,902,756

**NUMBER OF STUDENTS STUDYING ON CAMPUS - 2012-2015**

<i>Control of institution</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>
Public	13,734,217	13,543,411	13,356,887	13,194,946
Private not-for-profit	3,632,072	3,595,626	3,533,927	3,531,209
Private for-profit	928,639	839,631	762,518	637,456
Total	18,294,928	17,978,668	17,653,332	17,363,611