

Mapping Online English-taught Programmes Worldwide



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1. Introduction

When prospective students think about attaining their tertiary education abroad, such students usually consider travelling to enrol into their preferred programme and institution in person. Thus, the mobile student is the primary element that forms the foundation of what is considered today to be a globalised and internationalised higher education system.

In general, the notion of internationalisation within this system has broadened significantly. According to data from UNESCO, the annual growth in international students deciding to study abroad has been averaging a 5.4% since 1998.¹ While the Covid-19 pandemic negatively affected that growth, OECD data notes a strong return in 2022 with a 24% rise in international student mobility.²

It is unsurprising that the Big Four destination countries (United Kingdom, United States, Australia, and Canada) attract most of these students taking this big step to study abroad. However, countries in Europe, Asia, and Africa are growing as 'non-traditional' destination countries of interest to students, providing a sense of flexibility within the decision-making process of prospective students.

Besides the increasing interest in different regions, international students demonstrate more interest in online study programmes. Recent research by McKinsey has revealed that this interest has been accentuated by the pandemic as online learning became an integral alternative that helped students across the world to continue to seek international degrees behind closed borders.³

Moreover, the rise of online learning has catered to the needs of self-directed learners who are typically already educated and employed.⁴ Online Master's programmes have become particularly suitable for these individuals, offering flexibility and accessibility. The fields of study available for Master's degrees have also broadened - especially outside the Big Four - in subjects such as those related to computer science, business, hospitality, and natural sciences.

Institutional pressures and student loan policies continue to shape the growth of online programmes, addressing both the demands and financial constraints of prospective students.⁵ However, the financial considerations associated with obtaining a Master's degree, including those earned online, have risen significantly, impacting students' decisions and capabilities.

Taking these factors into account, this report considers the trends and developments of online programmes primarily taught in English, with special attention paid to the offers coming from study destinations beyond the Big Four.

Doing so, the report's analysis provides a deep into programme supply and observes the growth of online English-taught programmes (ETPs) by study level, subject area, region, and also by city. Other aspects include the assessment of online programme supply across institutions, university rankings, study formats, and IELTS entry requirements.

¹ UNESCO. "UNESCO Institute for Statistics Data Centre". Retrieved 23 May 2024 from <https://data.uis.unesco.org/>.

² OECD (2023) "International Migration Outlook". Retrieved 23 May 2024 from <https://www.oecd-ilibrary.org/sites/b0f40584-en/index.html?itemId=/content/publication/b0f40584-en>.

³ McKinsey & Company (2023), *What do higher education students want from online learning?* Retrieved on 26 July 2024 from <https://www.mckinsey.com/industries/public-sector/our-insights/what-do-higher-education-students-want-from-online-learning>.

⁴ Blagg, K. (2018) 'The Rise of Master's Degrees: Master's Programs Are Increasingly Diverse and Online'. *Urban Institute*. Retrieved on 26 July 2024 from <https://files.eric.ed.gov/fulltext/ED592626.pdf>; see also Weller, M. (2023). *The Rise and Development of Digital Education*. In: Zawacki-Richter, O., Jung, I. (eds) *Handbook of Open, Distance and Digital Education*. Springer, Singapore. Retrieved on 26 July 2024 from https://doi.org/10.1007/978-981-19-2080-6_5.

⁵ *Ibid.*

2. International online education is here to stay

2.1. Online education as a viable option for prospective students

The Covid-19 pandemic forced thousands of students to transition from an on-campus mode of education to one solely provided online, meaning institutions were required to have the necessary infrastructure and resources in place to make this transition as seamless as possible.

Despite the challenges of this situation, most higher education students prefer to retain some online learning elements in their education. Out of the seven thousand students surveyed by McKinsey in 2022, nearly 65% of students continued to express a desire for virtual aspects such as recorded classes, easy access to study materials, and a flexible schedule.

The same research showed that the U.S. and Brazil witnessed significant growth in online education. Moreover, it was noted that students in the Americas valued the aspects of skills certification, preparedness evaluations, with students across multiple countries emphasising the importance of well-organised courses with clear guidance.

2.2. Online ETPs, the global picture

Although the US and UK are the dominant suppliers of online English-taught programmes, there is a gradual gradual shift towards “non-traditional” study destinations, seeking to become competitive suppliers in the digital sector. Studyportals data is exemplary of this, identifying more than 1,200 online ETPs offered by countries outside of the Big Four destinations in June 2024.

While this represents roughly 8% of the total global supply, the provision of online programmes is growing at a rate that allows international students to retain flexibility in selecting which institutions are supplying programmes that meet their needs.

In 2024

Studyportals identified

1,212

online English-taught programmes

Outside the Big Four
anglophone destinations

This means that, more than ever, prospective students for online study are spoilt for choice as they select their preferred programme according to specialised fields of study, unique modules that utilise innovative technology, financial support, full- or part-time options, and much more.

An important factor to consider is how more prospective students are likely to have access to the internet, wherein Data Reportal concluded that 5.35 billion people have internet access, or 66.2% of the global population, with 97 million new internet users coming online in 2023.⁶ This shows that, as the supply of online ETPs grows, there is also a parallel growth in prospective students that are gaining the capability to study online.

2.3. Transformation of international education – The online sphere

Online higher education has evolved significantly, moving beyond the initial hype to address various expectations and challenges. The rise of Massive Open Online Courses (MOOCs) such as platforms like Coursera, Udacity, and edX, brought high hopes for democratising education. These came with their own set of challenges, however, such as

⁶ Kemp, S. (2024) 'Internet Use in 2024'. *Data Reportal*. Retrieved on 26 July 2024 from <https://shorturl.at/uOogQ>

low completion rates and the high level of self-discipline required from students.⁷

The landscape of online learning now encompasses a variety of formats, including asynchronous courses, blended learning, and flipped classrooms, each catering to different learning needs and preferences.⁸ The appeal of online education largely lies in its potential to reduce costs and enhance convenience, although research on its effectiveness compared to traditional education yields mixed results.⁹

While there is concern that institutions and/or their faculties may be slower to fully embrace online courses,¹⁰ which could change in the near future as the online study format continues to develop. The future of online education holds various possibilities, ranging from enhanced accessibility and quality, to potential concerns about cost-cutting measures that might lower the quality for less privileged students.

The Covid-19 pandemic had a profound impact on online learning, significantly increasing the number of students taking online classes.¹¹ For instance, the US (the largest provider of online programmes), saw more than half of college students choosing to study online in 2022.¹² Such students have shown a preference for features like recorded classes, easy access to online study materials, and the flexibility that online learning provides. There are also challenges, however, including distractions, lack of motivation, and the need for self-discipline.¹³ This, in turn, could demotivate students from choosing online programmes over those provided on-campus, which provide a more secure sense of peer-to-peer learning.

⁷ McPherson, M. & Bacow, L. (2015) 'Online Higher Education: Beyond the Hype Cycle'. *Journal of Economic Perspective*, 29:4. Retrieved on 26 July 2024 from <https://pubs.aeaweb.org/doi/pdf/10.1257/jep.29.4.135>.

⁸ *Ibid.*; see also Garret, R. *et al.* (2023) 'CHLOE 8: Student Demand Moves Higher Ed Toward a Multi-Modal Future'. *Quality Matters*. Retrieved on 26 July 2024 from <https://qualitymatters.org/qa-resources/resource-center/articles-resources/CHLOE-8-report-2023>, p. 13.

⁹ *Ibid.*; see also Blagg (2018).

¹⁰ *Ibid.*

¹¹ Wood, J. (2022) 'These 3 charts show the global growth in online learning'. *World Economic Forum*. Retrieved on 12 November 2024

Enrolment trends in the US also reveal a substantial increase in the number of Master's degrees awarded since 2015.¹⁴ This surge in enrolment is complemented by a notable diversification in student demographics, as more students from underrepresented groups, including African American, Hispanic, and Asian American populations pursue advanced degrees. This highlights the role of online education in further internationalising higher education.¹⁵

Furthermore, higher education students have specific preferences for their online learning experiences, valuing aspects such as flexibility and convenience. These preferences also vary by region, with some students placing a high value on personalised support and university assistance in finding internships.¹⁶

In relation to this, the 2023 Global Student Satisfaction Awards (GSSA) report by Studyportals saw a notable 7.22% increase in student satisfaction with online learning compared to previous report in 2021.¹⁷ The surveys assessing the 'online classroom experience' highlighted several themes: students valued the flexibility and convenience of studying at their own pace; they also faced challenges like distractions, Wi-Fi issues, and maintaining motivation. Additionally, the importance of support and community was emphasised, with students appreciating the engagement provided by tutors, peers, and online resources.

This demonstrates that there is an apparent shift towards a multi-modal future in higher education, with asynchronous learning remaining a viable and flexible option for prospective students in the post-pandemic world. There has been significant growth in online and

from <https://www.weforum.org/stories/2022/01/online-learning-courses-reskill-skills-gap/>.

¹² Hamilton, I. and Swanston, B. (2024) '2024 Online Learning Statistics'. *Forbes Advisor*. Retrieved on 26 July 2024 from <https://www.forbes.com/advisor/education/online-colleges/online-learning-stats/>.

¹³ *Ibid.*; see also McKinsey & Company (2023).

¹⁴ Blagg (2018).

¹⁵ *Ibid.*

¹⁶ McKinsey & Company (2023); see also Weller (2023).

¹⁷ *Studyportals* (2023) 'Student Satisfaction: A 2023 Global Overview'. Retrieved on 26 July 2024 from <https://studyportals.com/reports/gssa-report-2023/>

hybrid enrolments among traditional-age undergraduates, adult undergraduates (25 years or older), and graduate students.¹⁸

In response, institutions are realigning their strategic priorities to strengthen online learning, focusing on course and curriculum design, virtual work experience, incorporating mobile learning technologies, and identifying in-demand degrees through market research.¹⁹ However, as institutions strive to support multi-modal learning environments—combining online, hybrid, and in-person formats—they face significant resource challenges that requires faculty retraining and infrastructure upgrades.

A crucial aspect that institutions have to consider is the need for comprehensive support for online learners, including mandatory orientation programmes and mental health services.²⁰ Furthermore, while most institutions engage in quality assurance benchmarking for online courses, few communicate these results to students.²¹

In general, the e-learning market is projected to grow substantially, making online degrees more prevalent and accessible.²² As such, investment in advanced technologies, such as virtual reality, is growing, though its effective use in education is still being explored.²³ Overall, the landscape of online higher education continues to evolve, driven by student demand and the ongoing need for institutions to adapt and innovate.

¹⁸ Garret *et al.* (2023), pp. 13-17.

¹⁹ *Ibid.*, pp. 17-21 and 46-49.

²⁰ *Ibid.*, p. 37-40.

²¹ *Ibid.*, pp. 41-43.

²² Wood (2022).

²³ McKinsey & Company (2023).

3. Methodology

3.1. Data Sources

The foundation of this analysis is the anonymous behavioural data that has been captured from users on the Studyportals' websites since 2013. This dataset is uniquely large: currently, the records of more than 55 million individual users are added every 12 months, covering more than 220 countries and territories. These visitors generate over 60 million sessions and more than 45 million programme pageviews annually. This large amount of information has been cleaned, validated, and organised.

As Studyportals only operates one English-language platform with no country-specific websites, visitors are well-distributed across the entire globe, providing a reliable, internationalised representation of prospective students interested in English-taught education.

Our database contains programme-level information for more than 240,000 individual studies, making Studyportals the largest platform for English-taught education globally. According to our estimates on total market size, this covers more than 90% of all ETPs offered globally at a Bachelor's and Master's level that are open to international students.

In particular, the data primarily used for the analysis in this report focuses on **online** ETPs offered at a **Bachelor's** or **Master's** level, unless indicated otherwise. In addition to this, the data displays insights largely focused on the supply of programmes between **January 2019 and up to June 2024**. However, in some cases the analysis compares programme supply for January 2019 against June 2024, or the whole year 2019 against 2024 (up to June).

Lastly, it is important to note that the scope of this report is to analyse and draw conclusions on the supply of online ETPs offered by non-Anglophone countries, especially outside the Big Four study destinations (the UK, the US, Australia, and Canada). The analysis includes a regional focus on non-Anglophone countries, grouping them into the Americas, the European Higher Education Area (EHEA), Sub-Saharan Africa (SSA), the Middle East and North Africa (MENA), and Asia which is split into the Chinese Region,

South Asia, and East Asia. This split for Asia is designed to highlight the growing importance of different destinations as suppliers within the region, while acknowledging the densely populated recruitment markets in Asia that these suppliers aim to attract and encourage students to study closer to home.

3.2. Data Quality

To keep the database up to date, our more than 40 people strong data team maintains an elaborate updating schedule, proactively monitoring rankings and gathering information from university websites. It is our aim to update each programme at least once a year, with more regular updates of key information, such as tuition fees.

As of March 2024, the Data Quality Score totalled 97.27 out of 100 possible points.

Our dataset reflects both the natural increase in global programme supply and Studyportals' commercial objectives to identify and catalogue ETPs. Thus, while some study destinations may show a sudden surge in programme availability, this often results from a combination of the country's efforts to enhance its competitiveness in higher education and Studyportals data collection initiatives. However, despite these apparent spikes in supply by individual countries, their global programme share remains relatively small and does not significantly impact the findings of this report.

Students predominantly search for programmes based on general disciplines such as Business & Management or Computer Science & IT, rather than specific programme names. For this reason, currently we are maintaining a list of 15 parent disciplines and 283 subdisciplines, based on commonly used categorisations as well as past user search behaviour. When a programme is added to our database, it is attached to up to three matching subdisciplines. This allows for easy segmentation of our data. Therefore, throughout this report, pageviews on programme details pages are used as an indicator for student interest, as this is the strongest and most granular indicator available.

3.3. Methodology constraints

Due to its nature, the Studyportals dataset is subject to certain restrictions that should be taken into account in the analysis and decision-making process.

Offline recruitment

The Studyportals dataset is limited to providing insights of students researching their study options online on the Studyportals' websites. Thus, this may create an incomplete picture for countries or subjects with a high amount of offline recruitment (e.g. international student agencies, campus open days, university-sponsored workshops, academic competitions, etc.). However, more students are now incorporating Studyportals into their search process, alongside local recruitment agents.

Studyportals-specific trends

The development of pageviews on the Studyportals' websites is not only dependent on the development of the global student demand but also other internal and external factors such as website improvements, competition, Google Search algorithm updates, etc. For this reason, most insights presented in this report are based on relative comparisons, rather than absolute numbers.

Homogeneity of class sizes

Since higher education institutions do not publish class sizes, the analysis assumes that the class size is the same for every listed programme. Outside of the market model, programmes may differ by the number of students involved.

Representation of institutions

Studyportals data on institutions worldwide covers a large share of the world supply of English-taught education. The coverage includes highly ranked institutions based on the major university rankings offering ETPs, as well as smaller providers also focused on teaching in English, totalling to over 3,500 institutions.

4. International Landscape

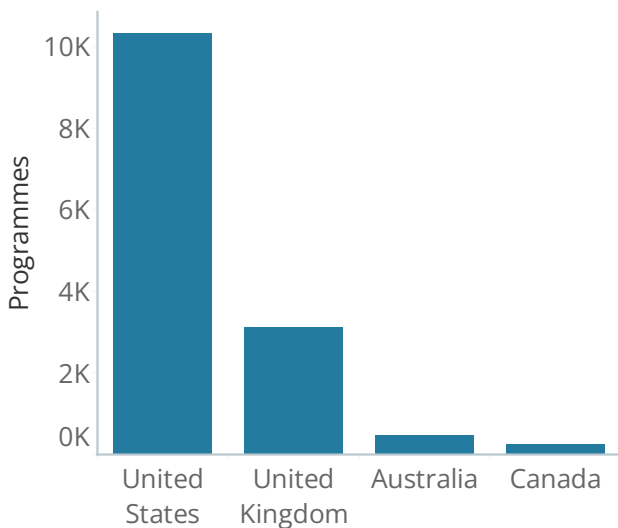
4.1. Supply and growth over time

Studyportals' database captured a total of 15,419 online Bachelor's and Master's English-taught programmes (ETPs) globally in June 2024. This represents an overall rise in online ETPs of 123% since 2019 when nearly 7,000 programmes were listed on Studyportals' websites.

Most online programmes continue to be offered by the Big Four anglophone destinations (the UK, the US, Canada, and Australia). This is especially true of US institutions, supplying 10.3K programmes, followed by the UK (3.1K programmes), Australia (489 programmes), and Canada (271 programmes), with these four destinations supplying an overwhelming 92% of all online ETPs at Bachelor's and Master's level.

Figure 1. Supply of ETPs offered by the Big Four study destinations, March 2024

Bachelor's & Master's online ETPs in the Big Four



Approximately 1,212 online programmes are currently offered outside the Big Four study destinations, representing a nearly 94.5% increase from the 623 programmes available in 2019. The number of programmes offered by the Big Four has grown at a faster rate, increasing by 125.7%, driven by online ETPs in the US and the UK.

Considering these factors, countries where English is not the primary language face significant competition in the digital landscape. To attract a global student audience, these countries could focus on research excellence and competitive pricing, positioning themselves as strong contenders. For instance, institutions leading in fields like artificial intelligence or global health, as seen in countries such as South Korea and Germany, draw international interest and may enhance their appeal in digital education.

In the case of discipline fields offered beyond the Big Four study destinations, Table 1 and Table 2 below show how Studyportals data noted significant growth in the supply of online Bachelor's in several fields. This can be seen with the increased supply for Applied Sciences (+1,000%), Education (+700%), Business (+157%), Hospitality (+143%), Computer Science (+123%), since 2019. Moreover, there has been a large growth in online Master's, such as for Computer Science (+181%), Business (+137%), Natural Sciences (+111%), Agriculture (+100%), among other areas.

However, it is crucial to note that some fields have seen no growth in online ETPs, specifically Arts, Environmental Studies, Law, and Journalism at the Bachelor's level, and Education, Journalism, and Law at the Master's level. This absence of growth in key areas suggests potential gaps in the digital education market, which may limit opportunities for students and restrict institutions from diversifying their online offerings.

Online Bachelor's and Master's growing in tandem

The majority of online programmes offered outside the Big Four unsurprisingly come from Europe, with these countries honing their goals for international education by expanding their academic excellence, flexible study options, and access to education through their online offers. Although the Big Four dominate the online format, there are promising signs that the growth in online programmes from other regions over the past five years will continue to rise rather than taper off.

This is apparent as the supply of online bachelor's and master's programmes has gradually grown since late 2021, with a future rise in programmes forecasted for this study method. It is still worth noting the steeper rise in online Master's compared to Bachelor's programmes, however, perhaps indicating how the difference in study duration at each level has influenced institutions' portfolio development.

Although various regions of the world beyond the Big Four may contribute to this growing supply, Studyportals data suggests that Sub-Saharan Africa (SSA), the Middle East and North Africa (MENA), and the Americas should be paid attention to. This indicates that other study destinations are looking to become more competitive with developed destinations in the West, but also as more students express their financial concerns, experience visa processing issues, or wish to study closer to home.

Figure 2: Projected growth of online ETPs by level

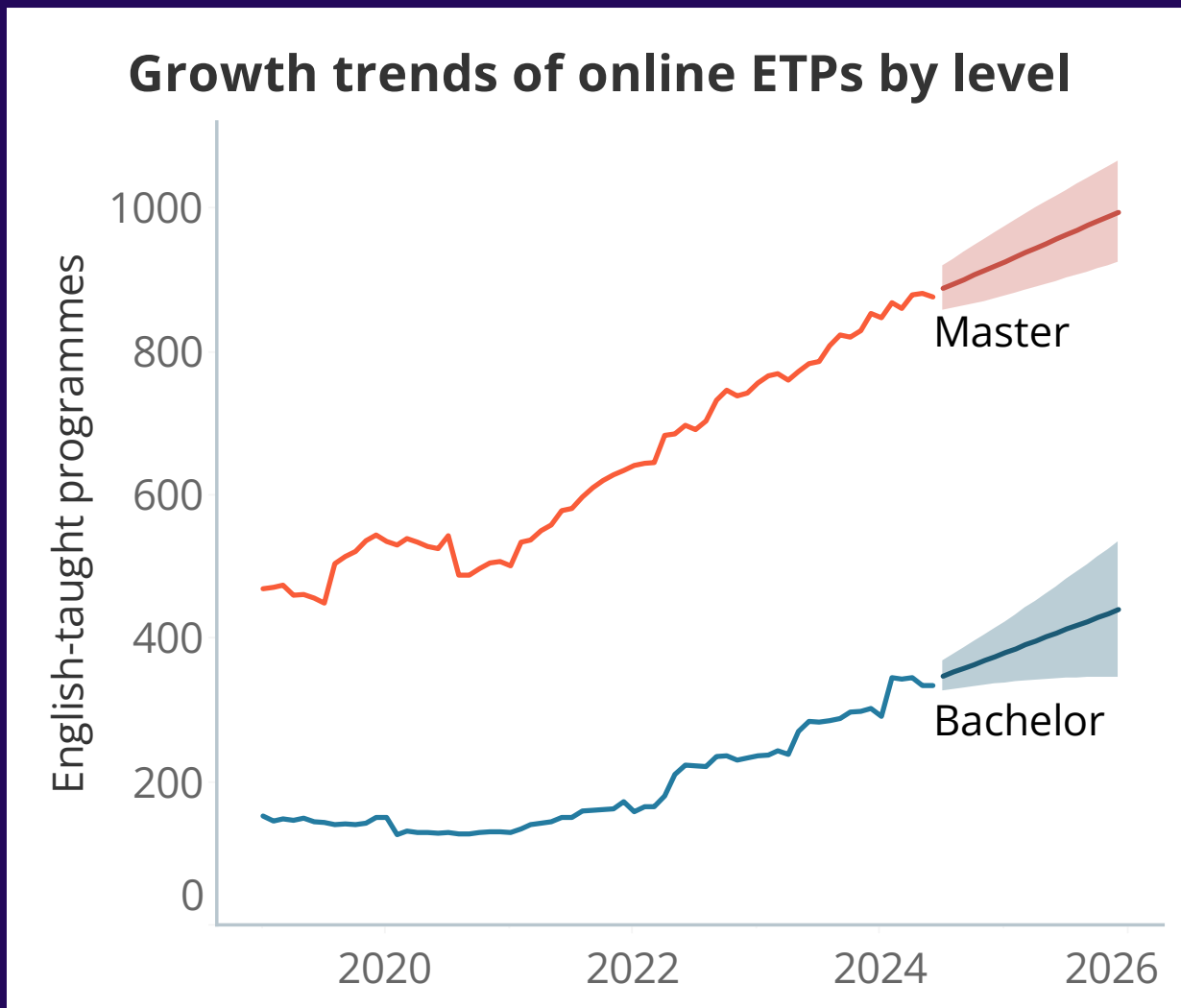


Figure 3: Growth of online ETPs outside the Big Four

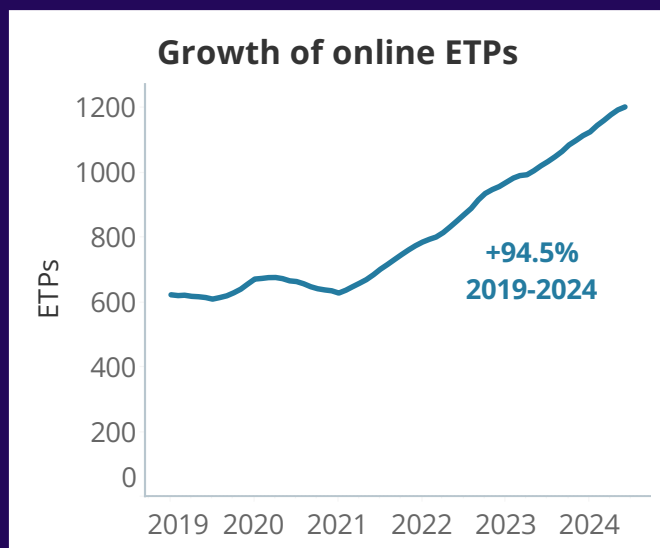


Figure 4: Growth of online ETPs outside the Big Four by level

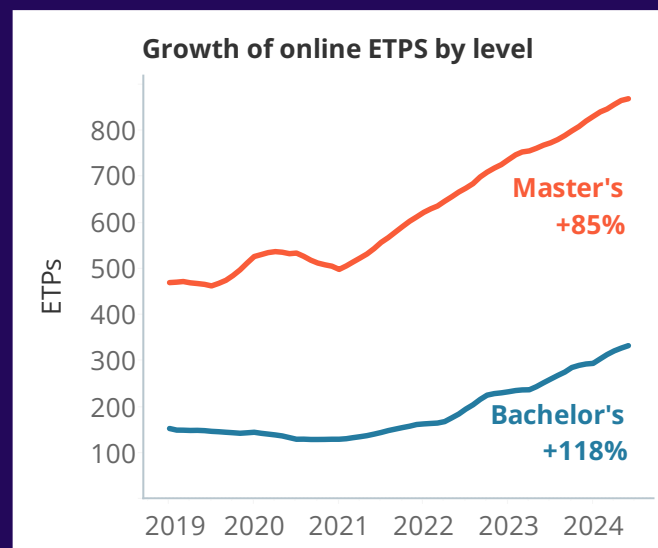


Table 1: Growth by discipline, Bachelor's level 2019-2024

Between 2019 and 2024 241 ETPs were added at a bachelor's level outside the Big Four	Applied Sciences & Professions	1,000%
	Education & Training	700%
	Business & Management	157%
	Hospitality, Leisure & Sports	143%
	Computer Science & IT	123%
	Social Sciences	108%
	Natural Sciences & Mathematics	100%
	Medicine & Health	67%
	Engineering & Technology	60%
	Humanities	50%
	Arts, Design & Architecture	0%
	Environmental Studies & Earth Sciences	0%
	Law	0%
	Journalism & Media	-33%

Table 2: Growth by discipline, Master's level 2019-2024

Between 2019 and 2024 446 ETPs were added at a master's level outside the Big Four	Computer Science & IT	181%
	Business & Management	137%
	Hospitality, Leisure & Sports	135%
	Natural Sciences & Mathematics	111%
	Agriculture & Forestry	100%
	Humanities	100%
	Environmental Studies & Earth Sciences	84%
	Arts, Design & Architecture	78%
	Social Sciences	58%
	Engineering & Technology	53%
	Medicine & Health	42%
	Applied Sciences & Professions	23%
	Education & Training	-4%
	Journalism & Media	-6%
	Law	-8%

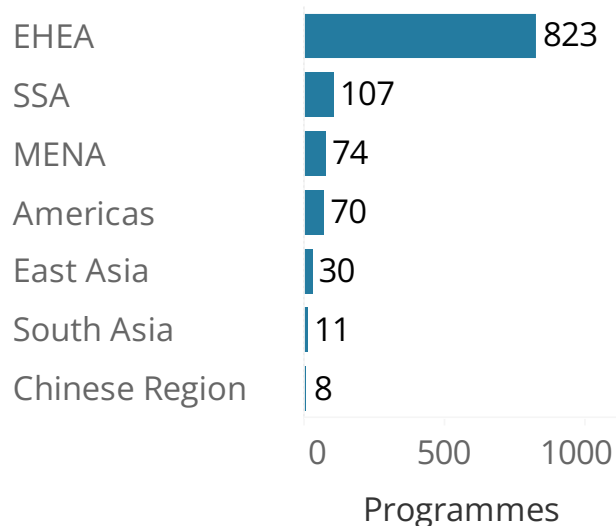
4.2. Regional differences

As shown in Figure 5, a significant share of the 1,212 online ETPs offered by countries outside the Big Four are located in the EHEA region (68%), followed by SSA (9%), and both the MENA and Americas supplying 6% each.

Meanwhile, countries in Asia offer relatively less online ETPs (49 programmes recorded in June 2024), making up a combined 4% share. As Figure 5 shows, the latter is due to very few Asian destinations supplying online ETPs for prospective students to consider when researching their study options.

Figure 5: ETPs per region

Online ETPs per region



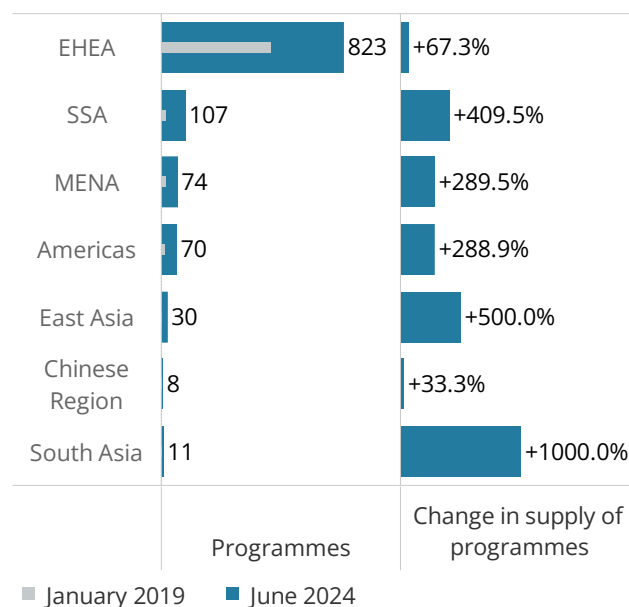
It is important to note that, as the UK is included in the Big Four group of countries, it is not included in the analysis of programme supply in the EHEA region. Considering this, Figure 6 indicates that the supply of online Bachelor's and Master's in the EHEA region rose by 67.3% from January 2019 (grey bars) to June 2024 (blue bars).

The countries that stand out in the EHEA region in terms of the size of their online ETP offers are Germany, Ireland, Spain, and Switzerland, as seen in Table 3, Italy, Cyprus, Sweden, France, and Finland follow suit by providing credible online portfolio sizes.

In contrast to this, countries in the SSA, MENA, and Americas each saw a significant rise in online programmes,

growing by 409.5%, 289.5%, and 288.9% respectively. When considering the size of individual countries' portfolios, however, it is clear that South Africa, the UAE, and Jamaica contribute a majority of programmes in their respective regions.

Figure 6: Change in supply of online ETPs, Jan 2019 vs Jun 2024



As a result of these figures, one thing stands out: the supply of online ETPs at Bachelor's and Master's levels in developing regions is unbalanced. There is a notable concentration of these programmes within certain countries, predominantly by a handful of institutions. This underscores the urgent need for more countries and higher education institutions in developing regions, particularly in SSA, MENA, and the Americas, to expand their offerings. This expansion is crucial to address the current disparity and to enhance access to quality online education across these regions.

In relation to this, as Asia is considered to become a strong competitor in the sphere of on-campus ETPs, it must also gradually work towards becoming a suitable alternative for prospective students seeking to study programmes online. This will not only expand the study options available on the global market but also place Asia on a level playing field with other regions.

Table 3: Institutions and programmes by main countries

	Destinations	Institutions	Programmes
Big Four	United States	857	10,332
	United Kingdom	170	3,115
	Australia	41	489
	Canada	46	271
EHEA	Germany	23	201
	Ireland	14	145
	Spain	29	115
	Switzerland	15	106
	Italy	17	47
	Cyprus	7	38
	Sweden	18	36
	France	9	25
	Finland	13	24
	The Netherlands	9	15
	Greece	8	13
	Other EHEA	33	58
SSA	South Africa	8	70
	Malawi	1	13
	Zambia	1	12
	Namibia	2	9
	Uganda	1	2
	Nigeria	1	1
MENA	United Arab Emirates	7	64
	Lebanon	1	6
	Israel	2	2
	Iran	1	2
Americas	Jamaica	2	55
	Puerto Rico	1	10
	U.S. Virgin Islands	1	2
	Mexico	1	2
	Belize	1	1
East Asia	Malaysia	9	22
	Singapore	2	7
	South Korea	1	1
South Asia	India	3	10
	Sri Lanka	1	1
Chinese Region	Hong Kong	4	8

Considering the distribution of online ETPs by discipline area, we can observe which fields are seen as the most feasible to be offered online and the countries that are working to improve their portfolios by adding more programmes that align with students' demand accordingly.

For instance, since January 2019, institutions in the US, the UK, and Canada have significantly increased their programme supply across several disciplines, especially in the Arts, Law, Education, Computer Science, and Applied Sciences. Conversely, the supply of online ETPs from Australia has dropped across various fields such as Agriculture, Environmental Studies, the Humanities, Law, Education, and the Arts.

East Asia also exhibits an increase of supply in Business & Management online programmes, while the Americas shows Social Sciences as a growing field in the region's online supply. In the MENA region, Business & Management and Environmental Studies & Earth Sciences seem to be the focus in terms of supply growth. Notably, South Asia has focused solely on offering Computer Science & IT online programmes in recent years. The high growth rates, however, are largely due to the relatively small number of programmes available in these regions, which amplifies the apparent increase in supply.

Beyond the Big Four, German institutions have greatly increased their supply of online programmes in Computer Science, Business, Engineering, and Environmental Studies. While the number of Social Sciences programmes has also grown since January 2019, it is important to note that there are only 22 online programmes on offer in Germany.

Other countries expanding their online offers include Spain and Switzerland, alongside Ireland, South Africa, the UAE, and Jamaica to a certain extent. Once again, it is worth noting that Studyportal's dataset captures both the organic growth in global programme offerings and Studyportal's aim to catalogue ETPs, revealing occasional surges driven by countries' higher education competitiveness and data collection efforts.

Table 4: Programme growth by discipline, Big Four vs Top-10 destinations by supply

	United States	United Kingdom	Australia	Canada	Germany	Ireland	Spain	Switzerland	Cyprus	Italy	South Africa	UAE	Jamaica	Sweden
Agriculture & Forestry	+44%	+88%	-77%	+0%		+150%	-100%							
Applied Sciences & Professions	+120%	+52%	-43%	+75%		+20%	-33%		-67%	+50%				+0%
Arts, Design & Architecture	+147%	+105%	-50%	+183%	+50%	-67%	+500%		+0%	+0%				
Business & Management	+145%	+67%	-30%	+100%	+786%	+0%	+138%	+168%	-64%	+26%	+5600%	+262%	+1850%	-33%
Computer Science & IT	+131%	+182%	+13%	+64%	+2950%	+50%	+250%	+1200%	+11%	-56%				-20%
Education & Training	+203%	+89%	-53%	+107%		-17%	+100%	+0%	-82%	-50%	+400%	+0%		+0%
Engineering & Technology	+83%	+49%	+16%	+100%	+300%	-5%	-50%	+200%	-100%	-90%	+0%			+25%
Environmental Studies & Earth Sciences	+57%	+71%	-62%	+63%	+300%	-10%	+200%	+120%		+0%	-100%	+200%		+33%
Hospitality, Leisure & Sports	+129%	+58%	+114%	+700%		+50%	+114%	+225%	-33%	+50%			+200%	-100%
Humanities	+273%	+93%	-63%	+48%		+60%	+50%		-20%	-50%	+0%			+350%
Journalism & Media	+131%	+55%	+11%	+150%		+0%	+0%	+100%	-100%	-67%				-33%
Law	+139%	+107%	-55%	+433%	+100%		+25%	+25%	-67%	-100%				-80%
Medicine & Health	+176%	+76%	-21%	+24%	+550%	+46%	+8%	-33%	-38%	+400%	+100%	+33%		-20%
Natural Sciences & Mathematics	+144%	+115%	-9%	+0%	+0%	+100%	+67%		+0%	-33%				+0%
Social Sciences	+122%	+69%	-26%	+29%	+2100%	-11%	+17%	+67%	-35%	-62%				+29%

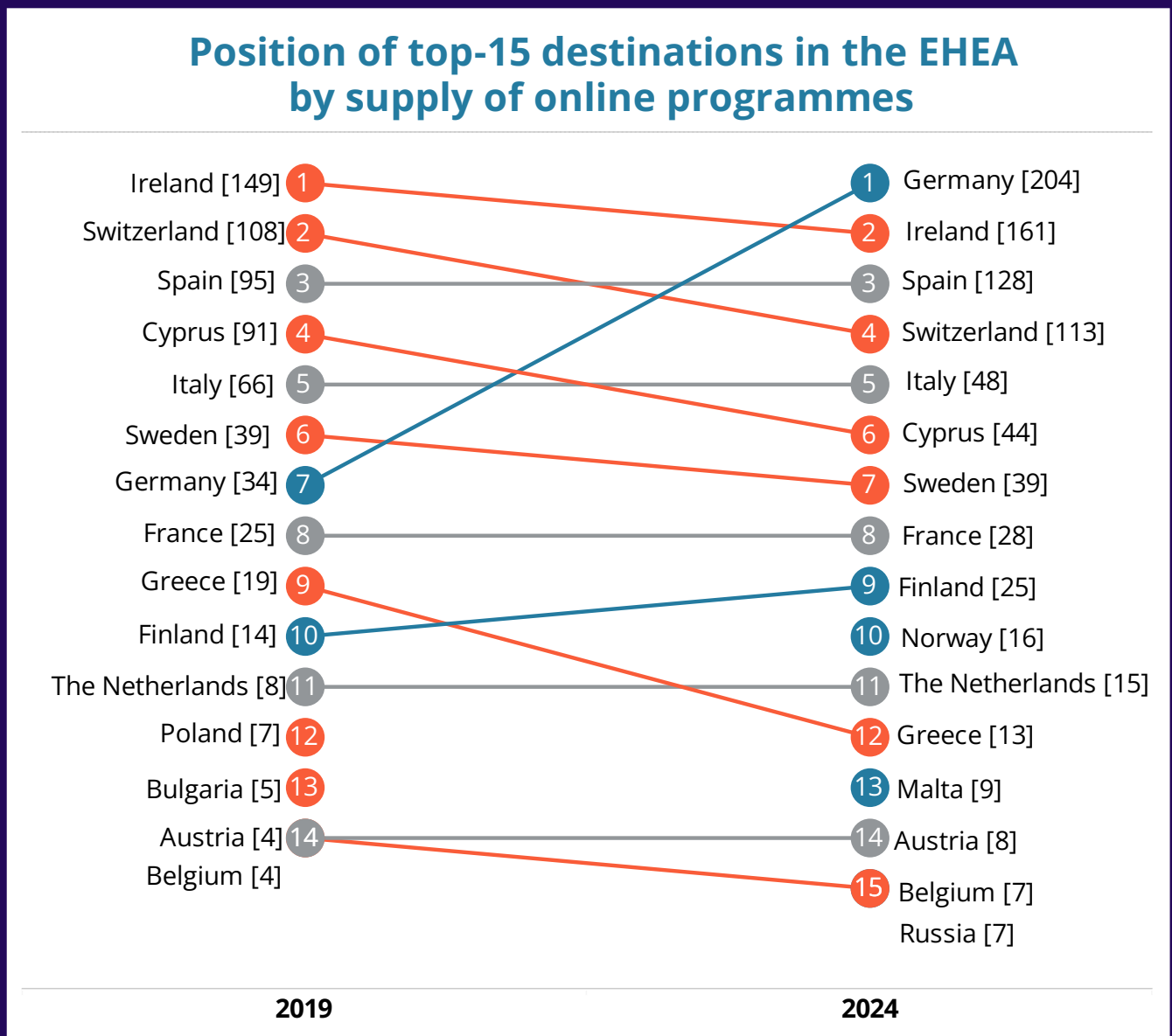
Shifts in EHEA suppliers

Outside the Big Four destinations, the EHEA region has begun to offer more online programmes. Among them, Germany has shown a remarkable increase of supply, followed by Ireland and Spain.

In addition to these top-3 suppliers in the region, some of the largest supply growth comes from Finland, Norway, and Malta, which have all risen up the ladder of the top-15 EHEA suppliers. Italy, France, the Netherlands, and Austria have retained their positions despite changes in their supply. For instance, Italy's supply of online ETPs has slightly declined, while the Netherlands shows an increase in supply.

On the other hand, Switzerland, Cyprus, Sweden, Greece, and Belgium have reduced their supply of online ETPs in 2024, leading to a decline in their positions compared to 2019. Switzerland and Cyprus now occupy lower positions (4th and 6th, respectively) than in 2019, while Poland and Bulgaria have completely dropped out of the top-15 list. This shift has created opportunities for other countries that have introduced new programmes in their institutions.

Figure 7: Position of top-15 destinations in the EHEA region



4.3. Breakdown by Institution

As this report observes the selected regions based on their supply of online ETPs, it is equally essential to examine the number of higher education institutions (HEIs) that supply online ETPs, as well as assessing the proportion of programmes offered per HEI within each region.

The metric “programmes per institution” could be considered a plausible indicator of an institution's strength, competitiveness, and dedication to providing students with a wide range of flexible educational options that assist in progressing career aspirations.

As noted previously, although HEIs in certain regions offer exceedingly small online portfolios, when comparing the share of those programmes per institution, most regions see low rates of online ETPs per institution. This is true for Hong Kong in the Chinese Region, as well as South and East Asia, while the Americas, SSA, and MENA regions indicate higher rates.

Conversely, each of the Big Four study destinations also see credible rates of online programmes per institution, with the UK displaying a noteworthy rate, while Canada is on par with other regions.

Table 5: ETPs and HEIs per region

	Institutions	Programmes	Programmes per Institution
Total	246	1,123	5
EHEA	195	823	4
SSA	14	107	8
MENA	11	74	7
Americas	6	70	12
East Asia	12	30	3
South Asia	4	11	3
Chinese Region	4	8	2
United States	857	10,332	12
United Kingdom	170	3,115	18
Australia	41	489	12
Canada	46	271	6

Upon breaking this down by the size of an HEI's online ETP portfolio, Table 6 displays a similar story. Considering this aspect, Studyportals data noted that 100% of HEIs in Asia overall provide less than 10 online programmes, with a staggering 92% of HEIs in the EHEA region in the same supply bracket.

Meanwhile, the share of HEIs by portfolio size is more dispersed in other regions, as can be seen for institutions in SSA, MENA, the Americas, and the Big Four.

Table 6: Distribution of HEIs by region

HEIs by ETP portfolio size

	less than 10 programmes	< than 20 ETPs	< than 30 ETPs	< than 40 ETPs	< than 50 ETPs	< than 100 ETPs	more than 100
East Asia (12)	100%	0%	0%	0%	0%	0%	0%
South Asia (4)	100%	0%	0%	0%	0%	0%	0%
Chinese Region (4)	100%	0%	0%	0%	0%	0%	0%
EHEA (195)	92%	6%	0%	0%	1%	2%	0%
SSA (14)	64%	29%	7%	0%	0%	0%	0%
MENA (11)	64%	27%	9%	0%	0%	0%	0%
Big Four (1,116)	62%	20%	9%	3%	1%	3%	1%
Americas (6)	50%	33%	0%	0%	17%	0%	0%

Academic atlas

Although analysing different aspect across the observed regions provides a granular image of the current trends surrounding online ETPs, some key insights may still be hidden within each region. Therefore, Studyportals mapped the countries outside the Big Four study destinations by their rate of programmes per institution and the size of their online ETP portfolio.

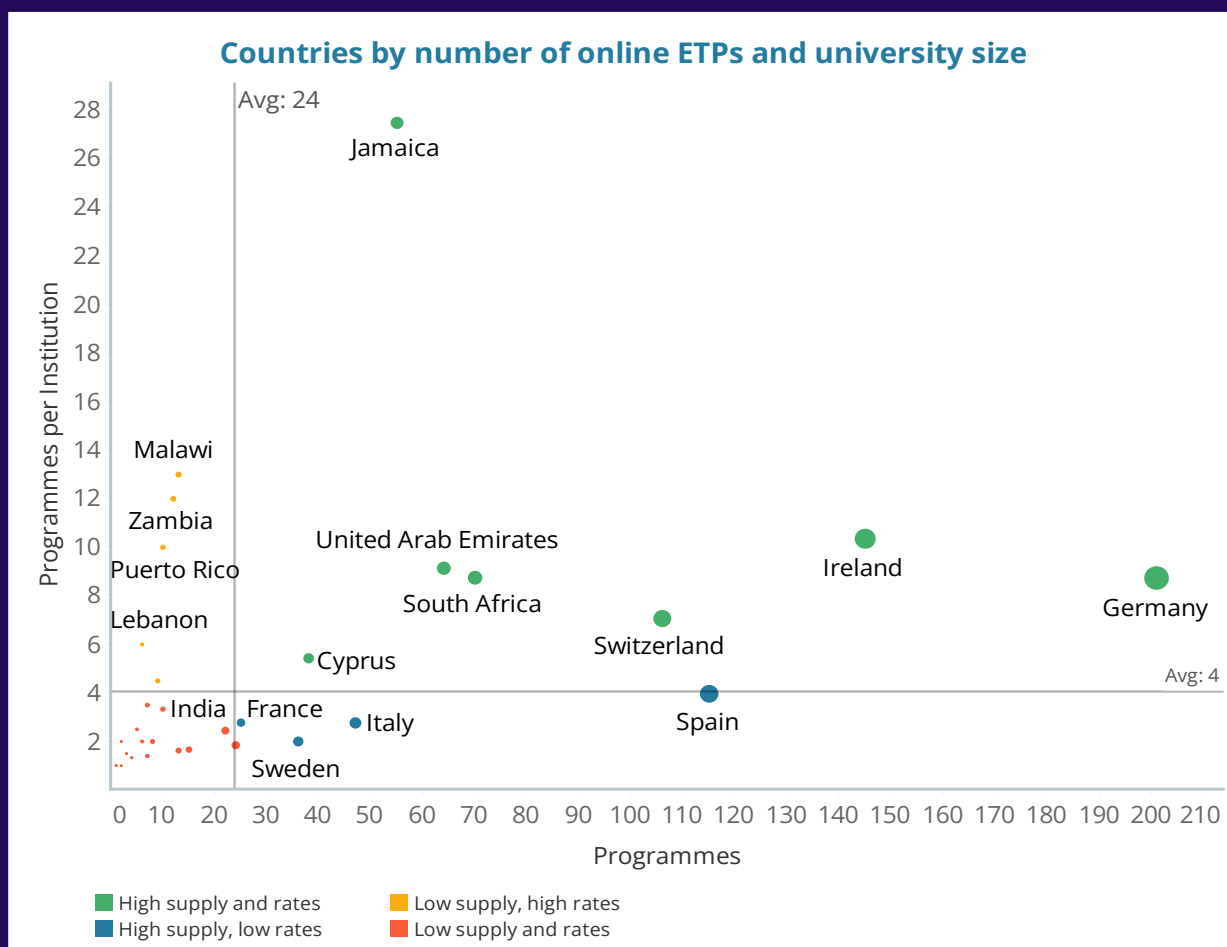
As a result, Figure 8 highlights how **green** countries like Germany are crucial destinations given their high supply of online ETPs and above average rate of programmes per institution outside the Big Four, alongside other suppliers such as Jamaica, Ireland, and Switzerland.

As can be seen in the figure, more study destinations have the capacity to join this group of countries given their above-average supply shown in **blue** such as Spain and Italy, and to a certain extent also Sweden and France.

The **yellow** countries such as Malawi, Zambia, and Lebanon have relatively smaller portfolios which are often offered by a handful of, if not a single, institutions. While these countries may be clustered into a similar category, it remains important to consider that these countries could be at different stages of developing their offers to align with regional and global competitors or according to the overall trends of international student mobility.

For instance, Germany, Ireland, Switzerland, Spain, and France are significantly more developed than India. Even within more selective clusters there are outliers, such as the Netherlands, Greece, Austria, and Belgium, each of which display a low supply of online ETPs (**red bubbles**).

Figure 8: Countries by number of online ETPs and university size



As study destinations aspire to internationalise their portfolios, there is much opportunity for growth in the digital world, but also various challenges to overcome. To further explore the different stages of market maturity for online ETPS, Studyportals dived deeper into the data to consider particular proxy measures: university rankings; the presence of digital education hubs; and if HEIs provide a sense of discipline diversity for their online offers.

4.4. Global rankings

It is an established fact that both prospective international students and institutions value the assessments of ranking bodies, with the former including institutions' position globally in their decision making process. Essentially, rankings allow several stakeholders to benchmark institutions based on their academic performance, service-orientation, and international and gender diversity criteria.

While Times Higher Education's (THE) World University Rankings (WUR) represents different aspects of the academic world, these rankings might help HEIs adopt indicators to assess their online teaching environment, volume of students and diversity, as well as the extent of the multi-disciplinary research of good quality to give institutions an edge in becoming higher ranked. THE also aim to launch a global online learning ranking in 2024, assessing HEIs based on their online programmes, incorporating student feedback through online surveys.²⁴

In the case of institutions, the ratio of unranked to ranked institutions offering online programmes is 1.64 : 1. The ratio of online Bachelor's and Master's programmes offered by unranked to ranked institutions is 1.32 : 1.

Considering the 2024 WUR, there are differences in the share of ranked and unranked institutions (Table 7) and online programmes (Table 8) across the regions. For instance, Table 7 shows that 50% of institutions with online

programmes in the Americas are unranked, but see most online ETPs supplied by ranked institutions (79%) as shown in Table 8. This indicates a wide disparity in the quality despite a more competitive programme landscape.

The EHEA, MENA, and SSA regions see more institutions and programmes being ranked than some developed countries. This suggests that while there are less institutions in these regions, a significant proportion meet global ranking criteria and signifies proactive developments within different tertiary education systems.

Meanwhile, despite the UK and Canada having well-established higher education systems, each exhibit high proportions of unranked institutions offering online ETPs. Moreover, each also feature a larger share of unranked programmes, highlighting areas for further development and evaluation within their educational frameworks.

Table 7: Share of ranked and unranked institutions by region

	Unranked	Ranked	Top-100
Americas (6)	50%	50%	0%
Australia & New Zealand (51)	25%	25%	50%
Canada (46)	67%	33%	0%
Chinese Region (4)	51%	47%	2%
East Asia (12)	18%	82%	0%
EHEA (195)	25%	75%	0%
MENA (11)	12%	78%	10%
South Asia (4)	57%	41%	2%
SSA (14)	24%	70%	6%
United Kingdom (170)	77%	19%	4%
United States (857)	36%	64%	0%

Table 8: Share of ranked and unranked programmes by region

	Unranked	Ranked	Top-100
Americas (70)	21%	79%	0%
Australia & New Zealand (574)	13%	13%	75%
Canada (271)	60%	40%	0%
Chinese Region (8)	53%	46%	1%
East Asia (30)	7%	93%	0%
EHEA (823)	9%	91%	0%
MENA (74)	13%	75%	12%
South Asia (11)	51%	48%	2%
SSA (107)	30%	62%	7%
United Kingdom (3,115)	69%	27%	4%
United States (10,332)	26%	74%	0%

²⁴ Times Higher Education (2023) 'New Online Learning Rankings to be launched by Times Higher Education'. Retrieved 10 July from <https://www.timeshighereducation.com/press-releases/new-online-learning-rankings-be-launched-times-higher-education>

Furthermore, it is also important to assess how a country's position could be influenced by its supply of online ETPs and the ranking of its institutions. For instance, Ireland, Austria, and South Africa each have a high proportion of institutions ranked in the top-500 and also have a larger portfolio of online ETPs than other countries. This may suggest a correlation between robust ETP portfolios with higher institutional rankings, potentially attracting international students and faculty.

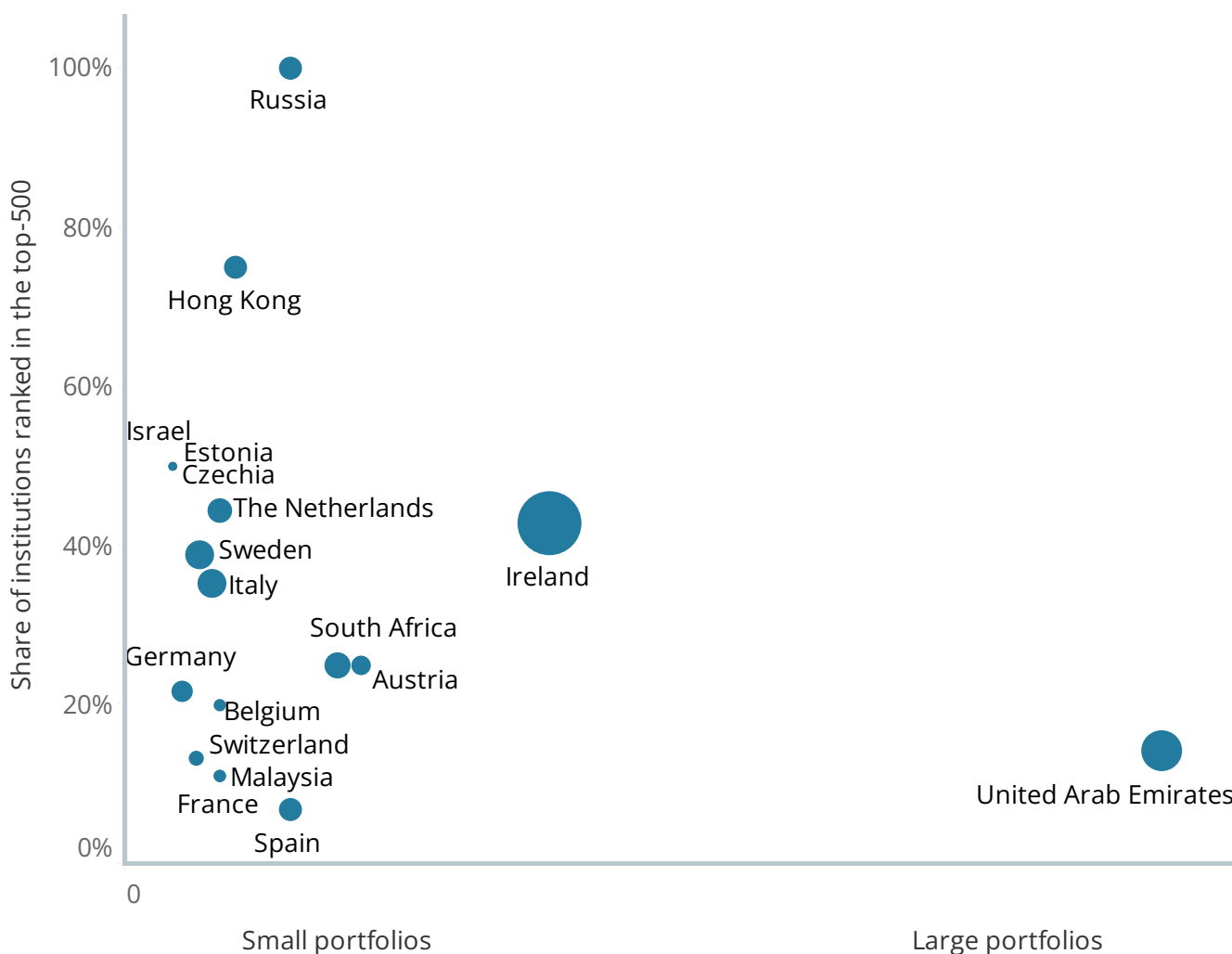
However, there is also a notable distinction in the size of online ETPs and the share of top-ranked institutions across different countries. For example, the UAE stands out as a country with a large portfolio but a relatively low

percentage of top-ranked institutions. On the other hand, the Netherlands, Russia, Hong Kong, and Italy are among those that have a strong share of institutions in the top-500 but maintain relatively small portfolios. This indicates that despite smaller numbers of online offerings, these countries achieve high rankings, possibly due to quality in other areas like reputation, research, faculty expertise, or student outcomes.

This might imply that, while having a large ETP portfolio can enhance accessibility and attract international students, it does not automatically lead to higher rankings, which may depend more on the quality and impact of institutional offerings.

Figure 9: Size of ETP offering and position in THE WUR ranking (2024)

Countries by share of ranked universities and size of their programme portfolios



4.5. City Hubs

While it may not be a priority for students looking for online programmes, identifying the main cities by the number of universities that offer online ETPs could indicate how they could influence student interest. This in turn could provide context into which cities are competitive and likely to remain so or grow in their competition.

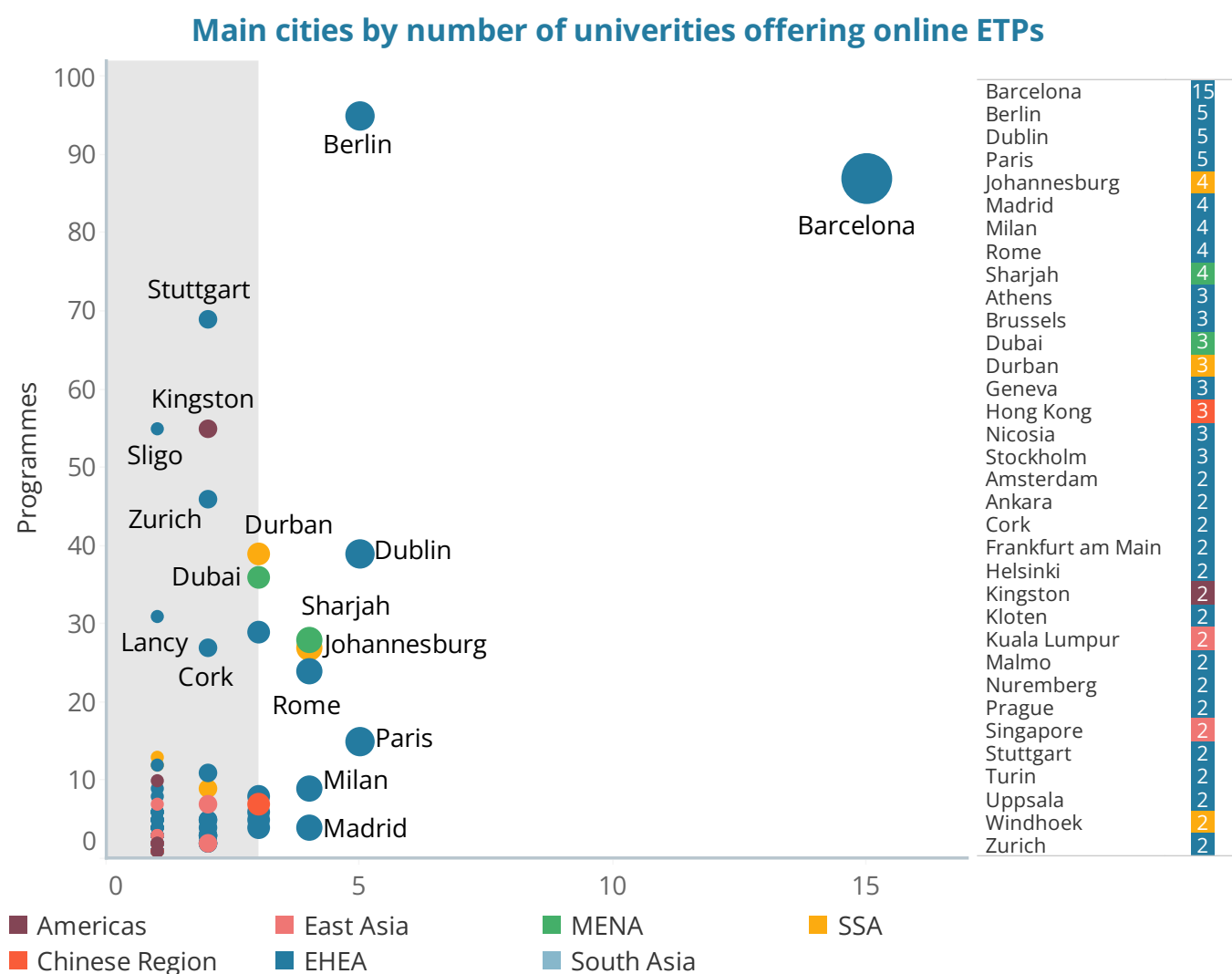
In defining a hub, Studyportals marked cities hosting at least 5 higher education providers. The majority of the

cities are from the EHEA region, which once again confirms the crucial role covered by the region in the provision of ETPs outside the main anglophone speaking destinations.

As such, Barcelona, Berlin, Madrid, Milan, and Paris appear as the largest hubs outside the Big Four in terms of HEIs offering ETPs.

Beyond the EHEA region, other cities that see a credible number of institutions offering online ETPs include Sharjah, Johannesburg, Dubai, and Durban.

Figure 10: City hubs by number of universities offering ETPs



In relation to cities that can be considered digital hubs of online education, Figure 11 reveals the trend of supply of online programmes at a Bachelor's and Master's level across the top-10 cities according to supply.

As was established previously, cities in the EHEA region are considered some of the largest suppliers of online programmes; however, when looking at trends, it is clear that institutions located in Berlin and Barcelona have been proactive in supplying more online ETPs. Meanwhile, several EHEA-based cities maintained a stable supply, such as Sligo, Zurich, Dublin, and Nicosia.

Beyond the EHEA region, institutions based in Kingston, Jamaica, and Durban, South Africa, became important suppliers of online ETPs around mid-2021 for their respective regions.

That being said, these trends continue to highlight the same outcome: that the EHEA region is a dominant supplier of online programmes beyond the Big Four, with certain countries serving primary suppliers within certain regions.

Figure 11: Trend of online ETP supply according to top-10 destination cities

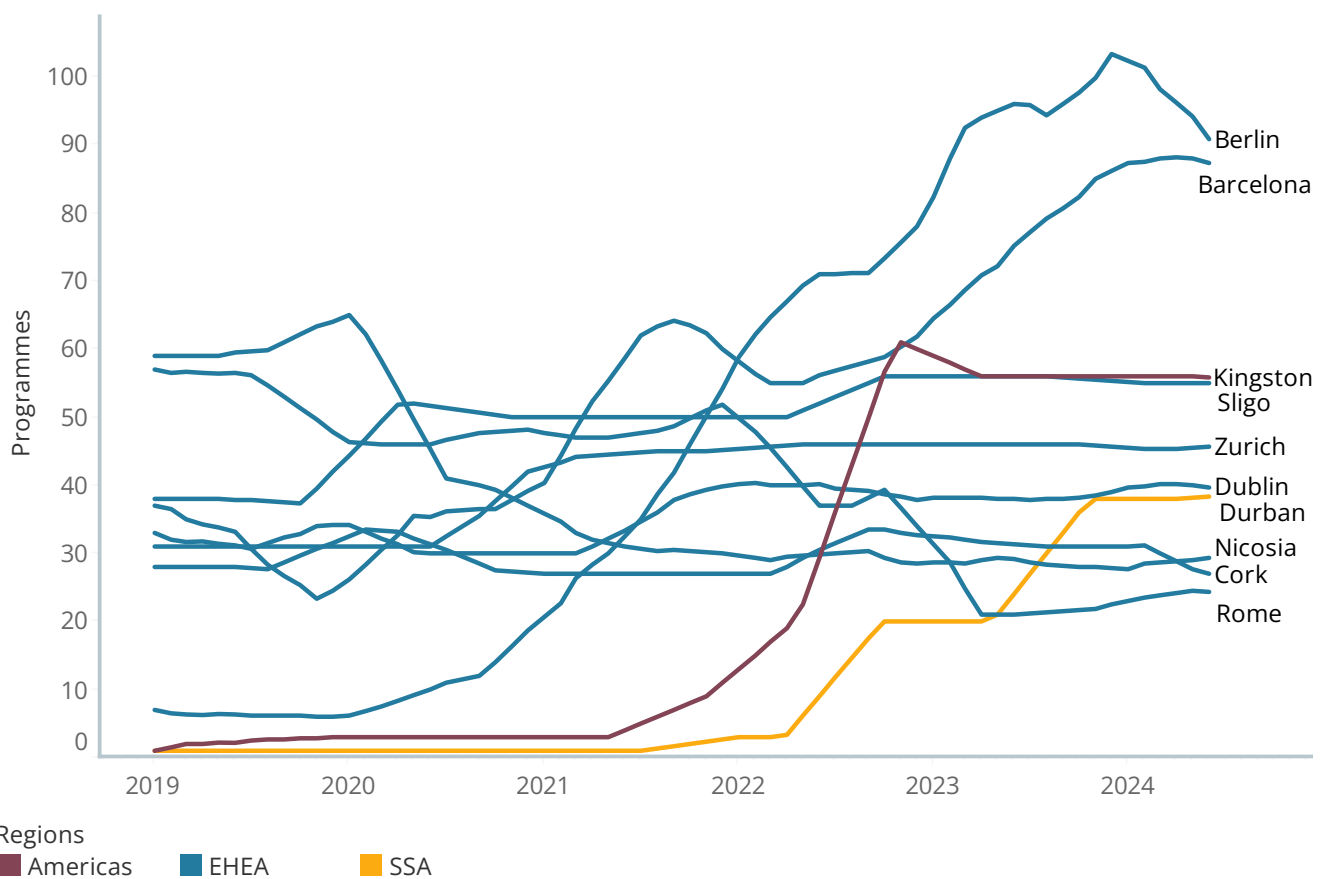


Figure 12 maps out those cities outside the Big Four study destinations with at least 5 institutions (represented by the dark blue dots). The size of each dot is proportional to the number of programmes offered in each city, with surrounding colour cloud being indicative of the programme density offered in a given location.

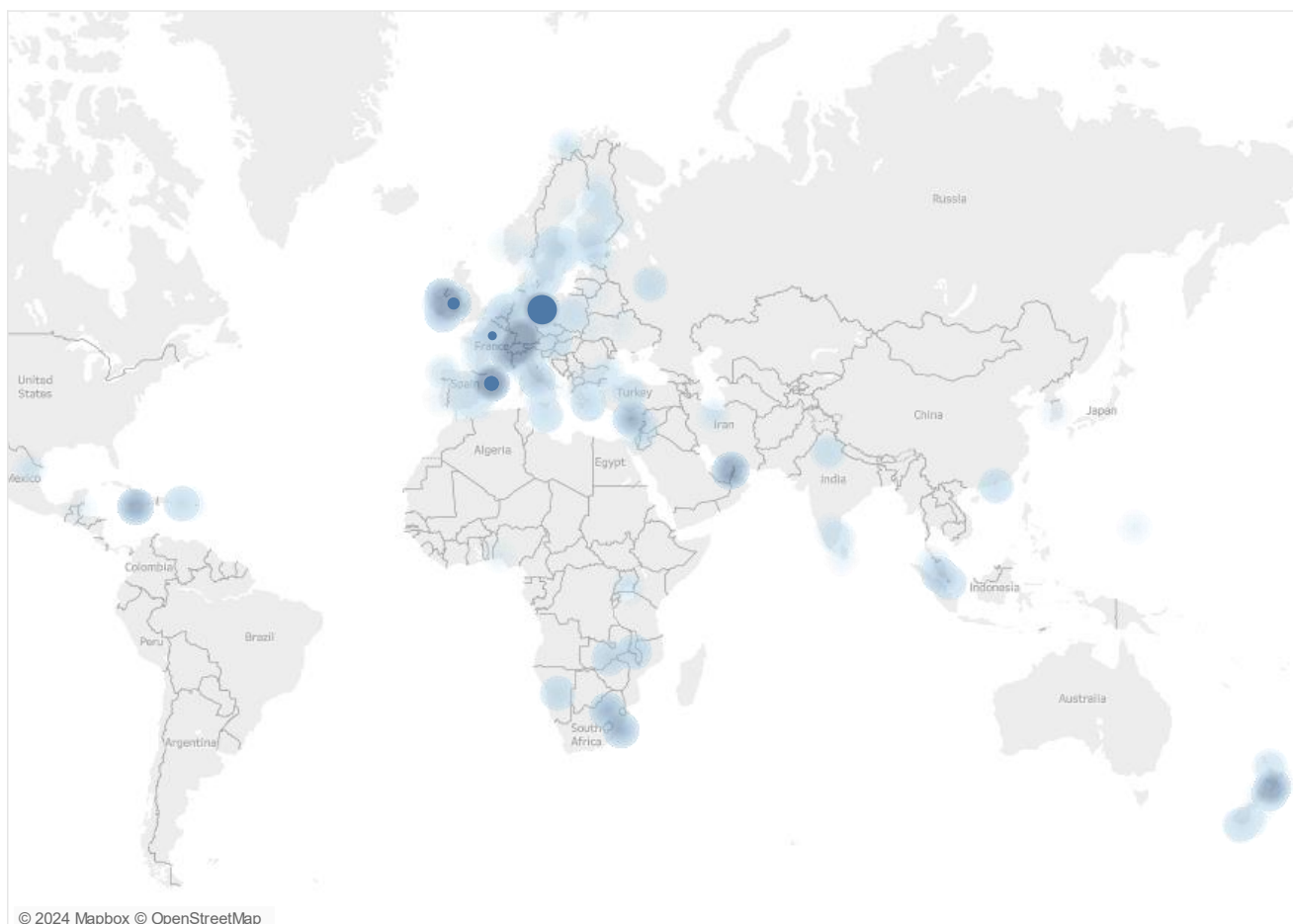
Globally, there remain certain locations that host a high number of institutions such as London, Barcelona, Chicago, New York, Toronto, Sydney, Paris, Dublin, Berlin, Cardiff. Such institutional presence gives some indication as to which cities are likely to be considered digital hubs of online education.

Moreover, online ETPs appear to be more dispersed across the continents rather than concentrated in certain regions. This can be seen by the relatively lighter blue clouds which highlight an even spread of programmes supplied at a national level.

In other words, while 29 cities worldwide host over 5 institutions each, offering a combined total of nearly 2,700 online programmes, there are also 882 cities with fewer than 5 institutions each, yet these smaller cities together offer nearly 12,750 programmes.

Figure 12: Destination countries and programmes offered

Programmes worldwide and cities with at least 5 programme providers



Blue dots show the cities with at least 10 programme providers.

The size of each dot is proportional to the number of programmes offered.

The blue cloud shows the location of programmes.

The darker the colour the more programmes offered in a given location.

4.6. Discipline diversification

As institutions strive to enhance their global reputation through best practices, portfolio diversification is another primary area they have direct control over when developing their strategies to distinguish themselves from the Big Four. This is important given the market changes taking place globally as students find it more challenging to

move to the Big Four with all the new policy changes on restricting international students.

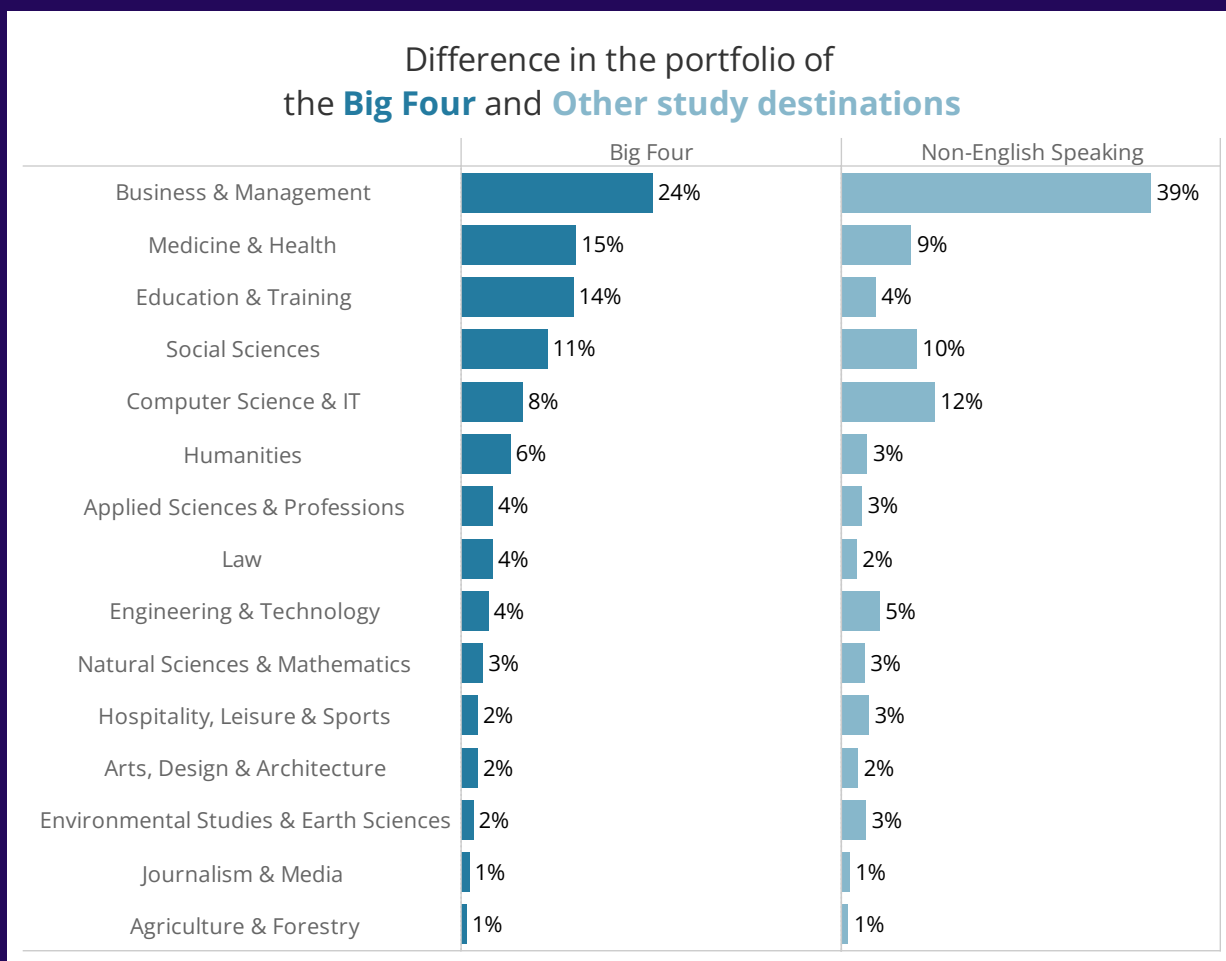
As shown in the figure below, online ETPs outside anglophone destinations continue to largely be offered in relation to the field of Business & Management, Social Sciences, and Computer Science & IT.

Disciplines across borders

It is not surprising that the split of online ETPs across discipline fields in the Big Four countries is diverse and covers all available subjects as they offer the highest share of supply. In other study destinations, however, deciding which programme will be delivered in English and online is often the outcome of a calculated effort.

The share of programmes associated with Medicine & Health and Education & Training is lower in other study destinations. This may be due to the importance of delivering such programmes in the domestic language. On the other hand, there is a much higher share of programmes offered in the Business & Management field outside of the Big Four destination countries as it is the most internationalised area that countries could easily offer. Computer Science & IT shows a similar case where there are less programmes offered in the Big Four than in other regions.

Figure 13: Share of programmes per discipline



Going one step further, Figure 14 considers the change in supply for the top-15 subdisciplines for June 2024 compared to January 2019, split by online Bachelor's and Master's.

It is worth noting that nearly all the top subdisciplines have witnessed a growth in the number of online ETPs being offered outside the Big Four. This is especially true of Business-related fields such as Digital Marketing, Marketing, Finance, but also for Health Sciences, Health

Administration, Computer Sciences, and Artificial Intelligence.

The only fields that have seen a drawdown of online programmes are online Master's in Education and online Bachelor's in Information Technology. However, these trends reflect broader shifts taking place in the higher education market, driven by technological advancements, adjusting to students' interest, changes in the job market, including evolving professional requirements.

Figure 14: Change in supply for the top-15 subdiscipline fields, June 2024 vs. January 2019

	Bachelor	Master
Business Administration	+146.7%	+215.0%
Management Studies	+134.6%	+86.2%
Master's in Business Administration (MBA)		+111.3%
International Business	+300.0%	+116.0%
Health Sciences	+200.0%	+23.1%
Computer Sciences	+63.6%	+47.1%
Health Administration	+200.0%	+58.3%
Education	+600.0%	-23.3%
Information Technology (IT)	-7.1%	+69.2%
Marketing	+142.9%	+225.0%
Finance	+114.3%	+200.0%
Public Health		+25.0%
Project Management	+150.0%	+62.5%
Digital Marketing	+1100.0%	+480.0%
Artificial Intelligence		+825.0%
Medicine		+43.5%

In terms of which programme titles are in large supply on the digital higher education market, Table 9 reveals the supply and change in supply of the top-20 programme titles according to the Big Four and other study destinations.

It can immediately be seen that there is a broad range of programmes that institutions choose to launch as online programmes, with the possible intention of appealing to a diverse audience of prospective students. However, it is also interesting to note the difference in supply across these programmes which institutions choose to launch using conventional keywords.

For instance, Business Administration is a popular programme title offered by the Big Four and other study destinations alike, with more programmes offered on the market by June 2024. On the other hand, there are certain programme titles that have become more available in June 2024 in the Big Four market but have not been expanded as much, if supplied at all, in other study destinations. This can be seen with regard to online programmes in Nursing, Criminal Justice, Public Health, Psychology, Management, Cybersecurity, among others.

Putting these differences into perspective, other study destinations have many opportunities to identify and consider online ETPs in these and other popular programme titles. This is more so the case when taking into account that such programme titles are both appealing to the needs of different students and also align with the current demand of the labour market.

Table 9: Supply of top-20 programme titles, split by Big Four and Other study destinations

Programme title	January 2019		June 2024	
	Big Four	Other study destinations	Big Four	Other study destinations
Business Administration	78	6	193	20
Nursing	44	1	114	1
Criminal Justice	36		88	
Public Health	32	4	84	3
Accounting	31	2	74	8
Special Education	28		85	1
Human Resource Management	32	3	70	8
Public Administration	31	2	75	4
Psychology	34	5	71	2
Management	27	4	67	4
Education	35	4	71	2
Master of Business Administration	44	5	55	6
Organizational Leadership	19		70	
Project Management	34	2	55	4
Marketing	22	2	51	7
Educational Leadership	16		64	1
Data Science	13		59	4
Finance	26	1	51	4
Business Administration (Online)	4		51	8
Cybersecurity	17	2	54	

Instead of focusing on differences, Studyportals further summarised which disciplines are most represented in the online ETP landscape in non-anglophone regions by placing disciplines into four categories:

1. **Main disciplines** are disciplines that make up the bulk of online ETPs in non-English-speaking countries such as Business & Management, Computer Science & IT, and Social Sciences. This signifies the core focus of an institution’s online portfolio.

2. **Staple disciplines** form a part of nearly every country’s online ETP offer but are less common than programmes in the main disciplines. These include Medicine & Health and Engineering & Technology. As displayed in Figure 15, these are particularly pronounced in the MENA, Big Four, and EHEA regions. Conversely, the share from SSA institutions is the lowest, likely attributed to the region’s limited supply of online Medicine & Health programmes.

3. **Market specific disciplines** constitute a group of largely non-scientific disciplines whose weight varies by region. These are disciplines that are usually offered in key anglophone countries but are not present in non-English speaking regions. The relatively higher share of programmes related to these disciplines in the SSA, East Asia, and the Americas may indicate the importance of certain topics tied to the domestic development of various sectors of society.

4. Finally, **marginal disciplines** contain online ETPs that focus on domain-specific knowledge and are not usually associated with most offers in any specific market. Such disciplines are valuable as they cater to a niche of important, qualified professionals, but are rarely widespread across English-taught offers. In this case, the MENA region stands out as an outlier with a slightly higher share of programmes associated with Agriculture & Forestry and Journalism & Media compared to other regions.

Table 10: Discipline distribution by region

		Discipline	Non-English Speaking	Big Four	World
Main	Business & Management		39%	24%	26%
	Computer Science & IT		12%	8%	8%
	Social Sciences		10%	11%	11%
	Total		61%	43%	45%
Staple	Medicine & Health		9%	15%	14%
	Engineering & Technology		5%	4%	4%
	Total		74%	61%	62%
Market Specific	Education & Training		4%	14%	13%
	Humanities		3%	6%	6%
	Applied Sciences & Professions		3%	4%	4%
	Natural Sciences & Mathematics		3%	3%	3%
	Hospitality, Leisure & Sports		3%	2%	2%
	Environmental Studies & Earth Sciences		3%	2%	2%
	Law		2%	4%	4%
	Arts, Design & Architecture		2%	2%	2%
	Total		24%	37%	36%
	Marginal	Agriculture & Forestry		1%	1%
Journalism & Media			1%	1%	1%
Total			2%	2%	2%

Business & Management and Computer Science & IT programmes are more prevalent in non-anglophone countries compared to their representation in the Big Four. This trend has led to a higher overall proportion of programmes associated with main discipline areas.

From the non-English speaking countries, it appears that the MENA, SSA, and East Asian regions are the most polarised as most of their ETPs fall under the main discipline of Business & Management. For East Asia, for instance, 73% of its online ETPs are in Business.

On the other hand, while the Chinese region mostly offers programmes in Business & Management, it also offers a good number of programmes in Hospitality, Leisure & Sports, making it slightly more distinct from other regions. It is important to note that from the Chinese region, it is Hong Kong that offers these programmes.

Moreover, EHEA shows a higher share of programmes in Medicine & Health, with the Americas interestingly having a share of online ETPs in Education & Training similar to the Big Four. It is also worth noting that Computer Science & IT programmes are likely to grow given the recent interest for topics related to AI and machine learning, alongside the growing need for digital skills across the globe. This is an important point since Computer Science & IT already has a greater share in non-English speaking countries in 2024 compared to the Big Four study destinations, especially in the EHEA region which is a strong market competitively.

Overall, while the institutional portfolios are most concentrated towards the main disciplines, there are regions that have more diverse offerings which are worthy to note as online ETPs keep growing and developing, following the trends of the Big Four destination countries.

Figure 15: Discipline distribution by market

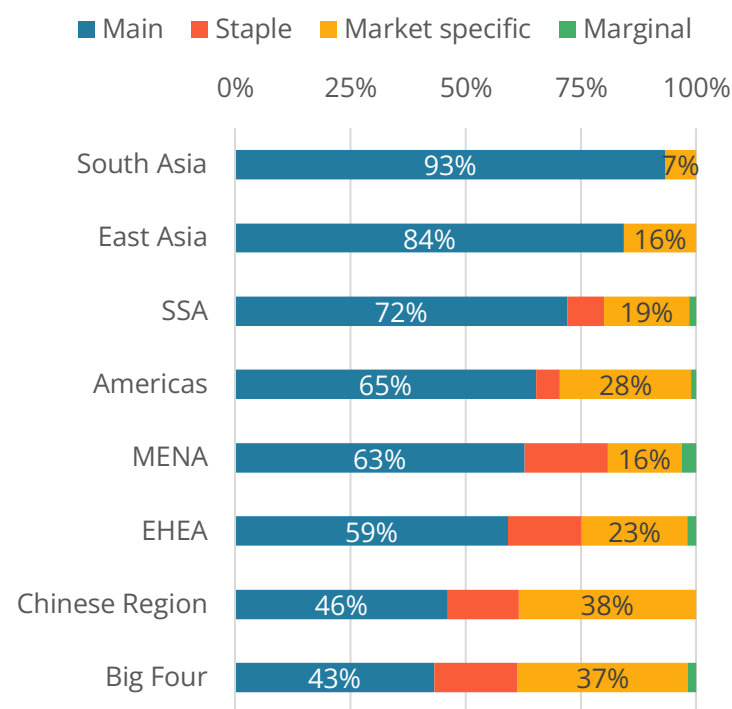


Table 11: Discipline distribution by region

Discipline		EHEA	SSA	MENA	Americas	East Asia	South Asia	Chinese Region	Non-English Speaking	Big Four	World
Main	Business & Management	36%	61%	55%	49%	72%	53%	38%	39%	24%	26%
	Social Sciences	9%	6%	1%	13%	3%	13%	8%	12%	11%	8%
	Computer Science & IT	15%	5%	6%	3%	9%	27%		10%	8%	11%
	Total	59%	72%	63%	65%	84%	93%	46%	61%	43%	45%
Staple	Medicine & Health	10%	6%	6%	3%			8%	9%	15%	14%
	Engineering & Technology	6%	2%	12%	2%			8%	5%	4%	4%
	Total	16%	8%	18%	5%	0%	0%	15%	14%	18%	18%
Market Specific	Education & Training	3%	4%	3%	14%	9%			4%	14%	13%
	Humanities	3%	3%	1%	4%				3%	6%	6%
	Applied Sciences & Professions	2%	1%	4%	4%			8%	3%	4%	4%
	Law	2%	6%				7%		3%	4%	3%
	Natural Sciences & Mathematics	3%	3%	2%	1%				3%	3%	2%
	Hospitality, Leisure & Sports	4%	2%		4%	3%		23%	3%	2%	2%
	Arts, Design & Architecture	2%	1%	2%	1%	3%			2%	2%	4%
	Environmental Studies & Earth Sciences	3%		3%				8%	2%	2%	2%
Total	23%	19%	16%	28%	16%	7%	38%	24%	37%	36%	
Marginal	Journalism & Media	1%	1%		1%				1%	1%	1%
	Agriculture & Forestry	1%		3%					1%	1%	1%
	Total	2%	1%	3%	1%	0%	0%	0%	2%	2%	2%

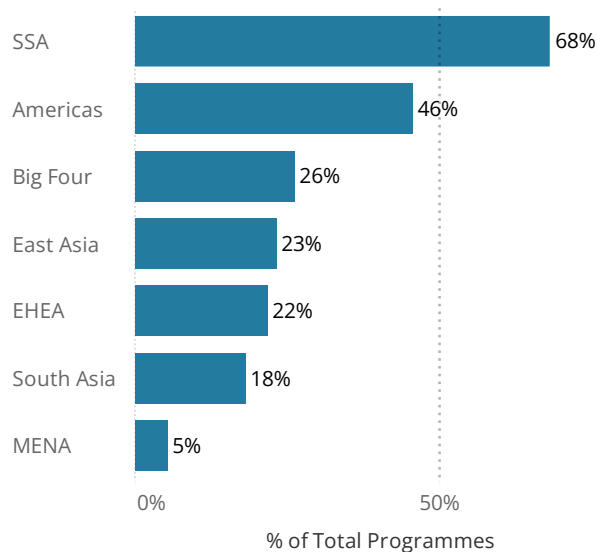
4.7. Level and method

To fully grasp the regional variations in offering ETPs, multiple layers need to be examined. The data so far has looked into rankings, institutional size, and portfolio availability at regional, national, and city levels. Additionally, this section explores regional differences in study level and methods to gain further insight.

Study levels often correspond to the point when students begin learning a new academic language. Countries that offer English-taught bachelor's pave the way for students to achieve their academic aspirations. However, since online bachelor's programmes would mean studying online for more than a year, which could be challenging in itself, Figure 16 reveals that most regions supply less than 50% of their programmes at this level.

Figure 16: Share of online Bachelor's programmes

Share of online Bachelor's per region



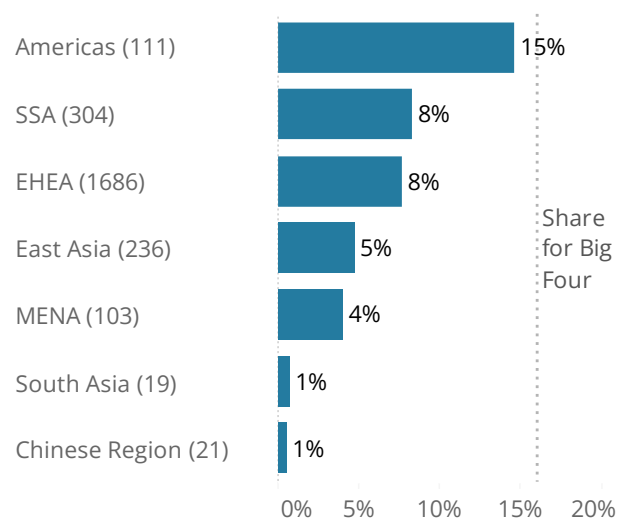
Meanwhile, the supply of online bachelor's amongst the Big Four study destinations stands at 26% of programmes, further reinforcing the idea that there is more focus to offer online master's programmes. On the other hand, countries in SSA indicate a 68% share of online bachelor's in relation to master's studies, followed by the Americas with a share of 46%. This might be attributed to countries in these regions leaning more towards online bachelor's programmes in order to attract international students that would otherwise not have chosen to study there.

For instance, South Africa, Namibia, and Jamaica are the top countries that indicate a possible intention to attract students towards their online bachelor's, especially given the strides each country has made to improve the inclusivity and quality of their education systems.

In turn, Figure 16 also shows how online master's are much more popular, especially for the MENA region or South Asia. This suggests that these regions are better equipped to offer and support prospective students interested in online master's programmes.

Figure 17: Share of non on-campus programmes

Share of non on-campus programmes per region



Considering the interaction between international higher education strategies and recent government policies that restrict international student mobility, new trends are likely to emerge, bringing more urgency for flexible ETPs to be seen as an alternative to students studying on-campus.

Online programmes have indeed gained popularity, particularly in the Big Four countries which have more resources to invest. This emerging trend of offering online programmes highlights the importance of discussions aimed at establishing a more robust online market.

As shown in Figure 17, while the Americas have the highest share of flexible study options compared to their on-campus offers, EHEA remains the region that provides students with a wide selection of non on-campus ETPs.

Since the 2020 pandemic, online and blended programmes have been perceived more favourably by institutions since it allows the flexibility for international students to enrol to their programmes without the restrictions of domestic policies, affordability concerns, or visa complications.

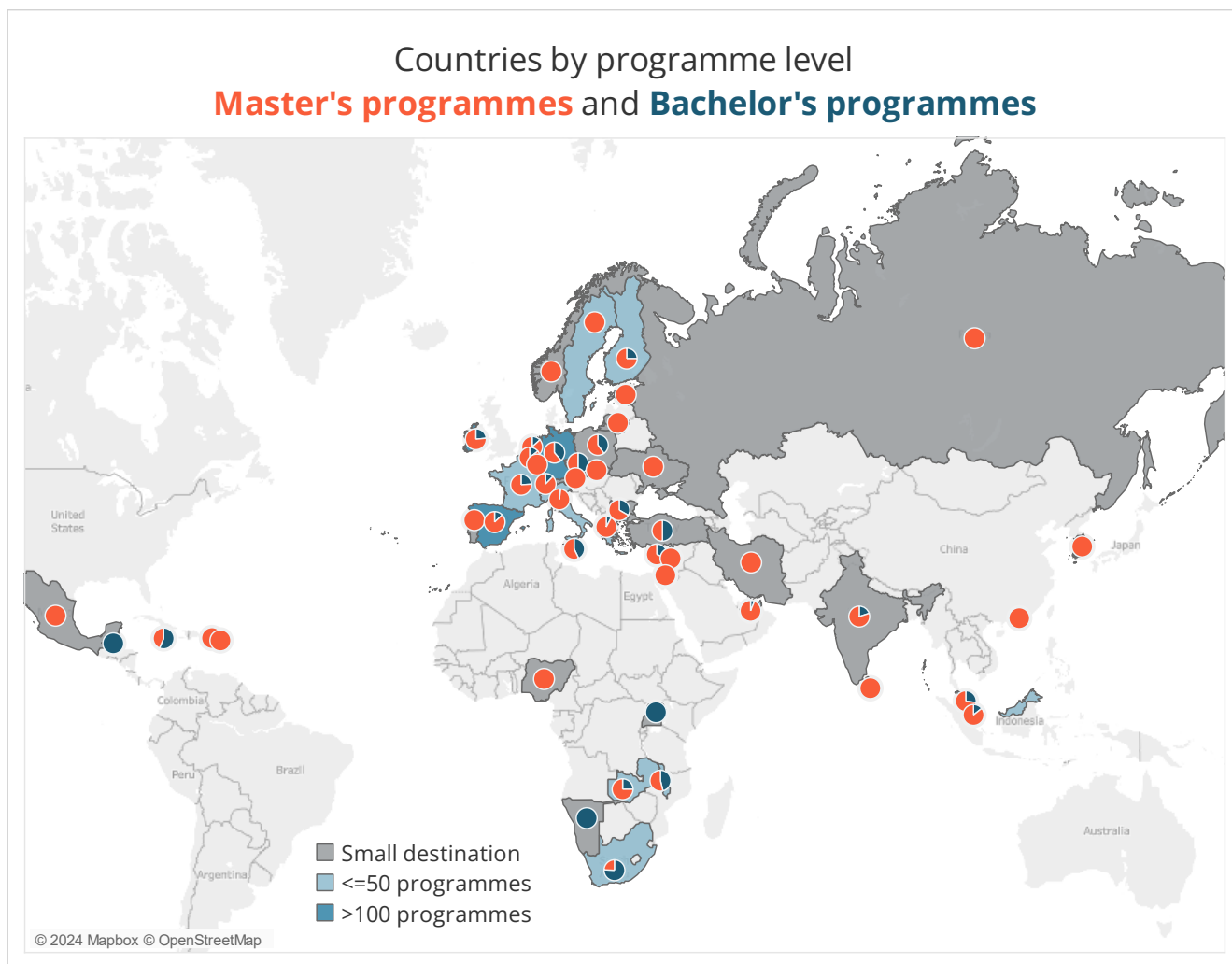
The map below provides an overview of the major providers of online ETPs globally. In addition to English-speaking countries like Ireland and South Africa, prominent destinations with a credible number of online ETPs include various European nations, especially Germany, Switzerland, and Spain, alongside the UAE, Malaysia, Malawi, and Zambia.

The map below further confirms the higher concentration of online master's, as indicated by the number of orange circles representing the number of institutions offering these programmes.

One important observation is the fact that the majority of the regions offer solely online master's programmes, while very few such as Namibia and Belize offer online bachelor's programmes exclusively. This reinforces the idea of institutions being more willing to offer master's programmes and may suggest that various countries should investigate the possible opportunities that lie within bachelor's programmes as the online method develops.

Furthermore, the map shows the various countries that are considered 'small destinations' for online ETPs, given the low supply of programmes. This results in certain countries serving as the main provider for online programmes, such as Malaysia in East Asia, Jamaica in the Americas, and South Africa in the SSA region.

Figure 18: Main countries by number of programmes and levels



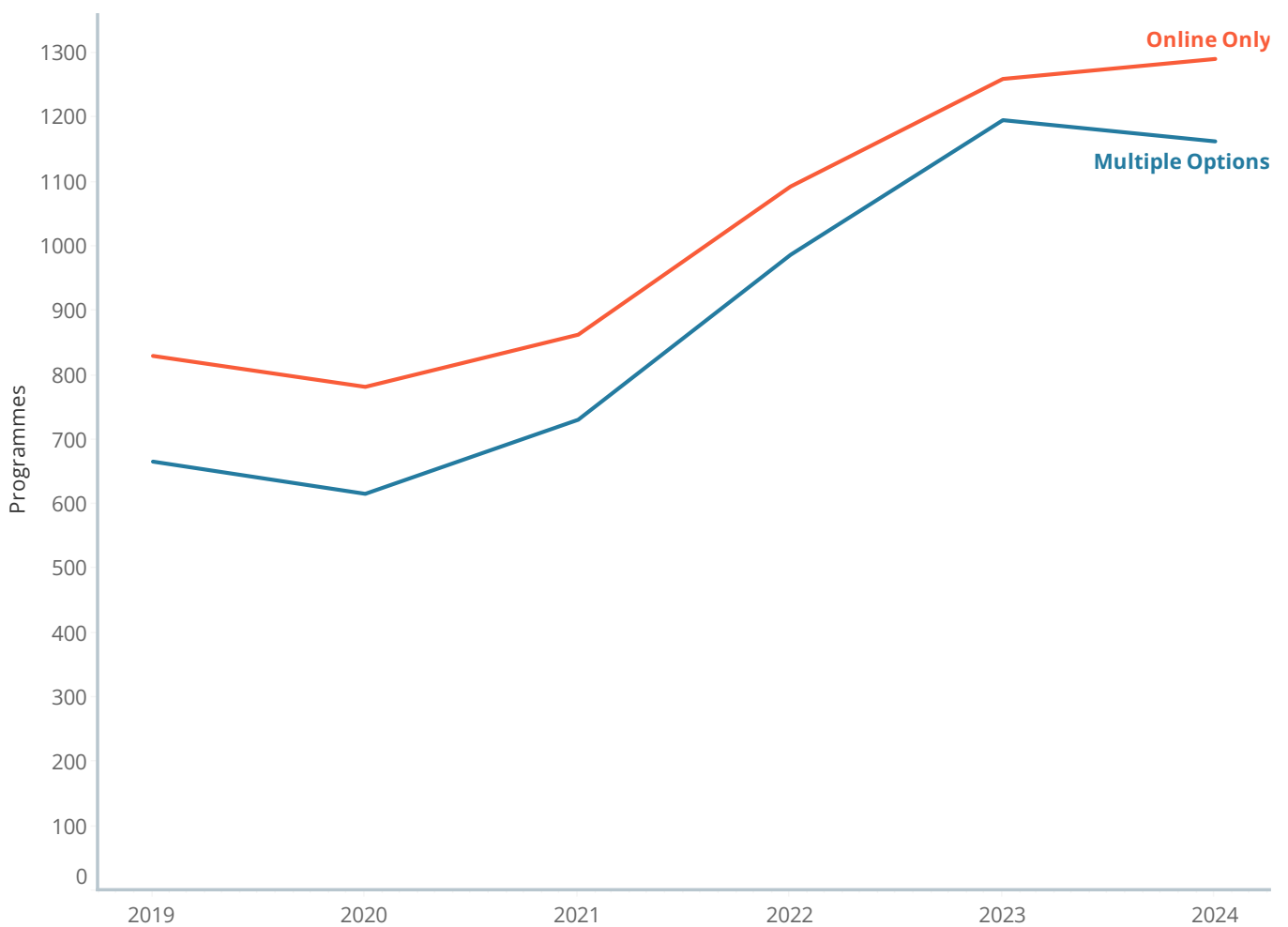
After looking at the difference of online programme supply based on the level of study, Figure 19 compares trend in supply between online programmes and programmes that are offered in multiple options, meaning programmes offered both on-campus and online. Even though programmes with multiple study options exhibit a slight

decline in programme supply, it is still important to note that over the years, both methods have shown similar trends of growth, which indicates how institutions are giving students various study options to consider during their decision making process.

Figure 19: Trends of online ETPs vs multiple option ETPs

Supply trends of Online programmes vs Multiple option programmes

Excluding the Big Four destination countries



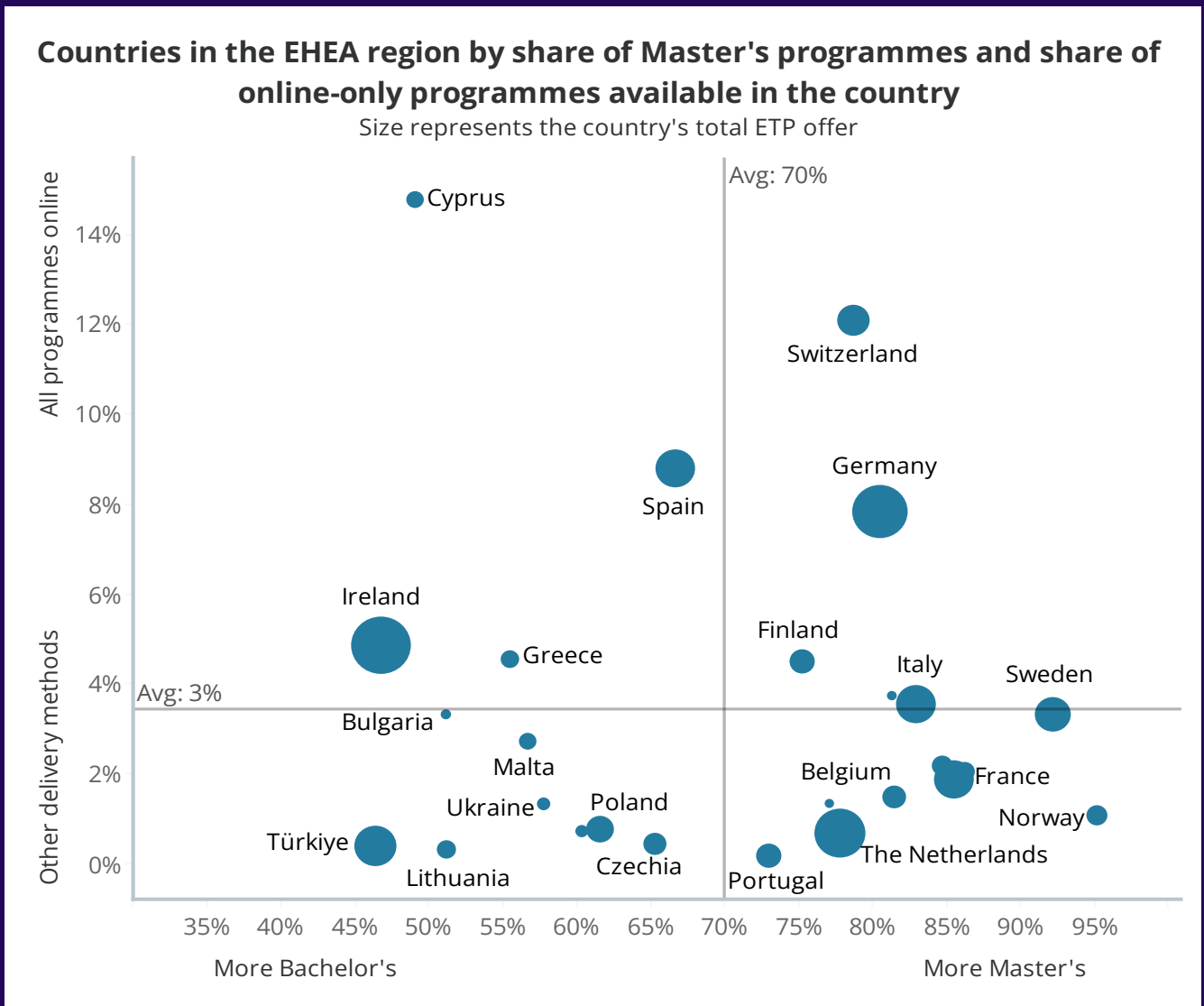
Deep-dive into study levels and methods – EHEA region

As seen established throughout this report, the EHEA region supplies the highest share of online ETPs outside the major English-speaking countries.

As shown in the bubble chart below, internationalisation in the EHEA region is primarily focused on online master's, yet the share of these programmes being offered online is rather low, with 8%-10% of the share shown for some of the largest suppliers such as Germany and Spain. It is also a matter of delivery methods: most countries rely firmly on on-campus programmes for their ETP portfolios, with the only countries having a relatively higher share of online programmes being Cyprus (15%) and Switzerland (12%).

Although Cyprus may be on the exploratory side of offering online bachelor's programmes (~32%), countries like Germany, Switzerland, and Spain, which have higher shares of online ETPs, demonstrate a readiness to expand their study methods. Other countries could look to these destinations for the best practices to adopt when developing and launching online ETPs.

Figure 20: EHEA countries by level and method



4.8. Format overview

Even though on-campus programmes are still predominant in the higher education market, there are slight indications of regions seeking to diversify their study methods to provide more flexibility to prospective students.

Across most regions, full-time on-campus offers dominate, with particularly high percentages in South Asia (98%), MENA (88%), and the Chinese Region (87%). Meanwhile, this share is relatively lower for the Big Four study destinations, and exceptionally low in the Americas.

Furthermore, some areas in the world are more likely to provide programmes in multiple formats, making it more versatile for students to choose their preferred path. These regions include the Americas, East Asia, and SSA.

While some regions' share of online or multiple options programmes are close to zero, other regions indicate offers of ETPs in various methods. For instance, The Americas, similarly to the Big Four, offer 9% of their programmes as online only, which is relatively high compared to other regions. In general, online only programmes are more popular in supply than those with multiple options, except in the case of SSA, the Americas, and East Asia where the supply of the latter is slightly higher.

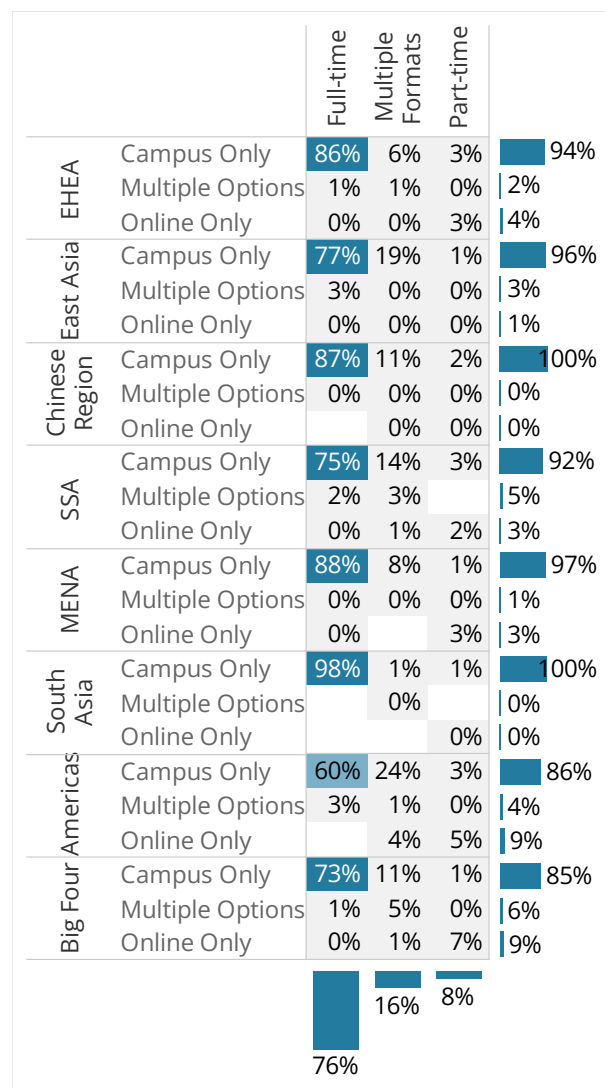
Overall, Studyportals data shows that institutions have generally remained close to the core of their value proposition: providing prospective students with a residential learning experience that provides a mixture of quality education, social opportunities, and both personal and career development. This can also be seen as multiple regions offer little to no full-time online programmes.

While that is true, it is still important to not overlook the supply of online ETPs that are already available and may increase in supply. Currently, the Big Four offer the most online programmes, given the extensive resources that they have to establish such ETPs and accommodate different student needs. However, as seen throughout this report, there are indications of other regions such as EHEA trying to catch up and become competitive in this market.

Furthermore, as domestic policies across various study destinations negatively impact the flow of international student mobility, there is likely to be a shift in students' study method choices as online programmes may prove to be more feasible. For those students that continue to prioritise studying at well ranked institutions, such as Asian students in particular, online ETPs may become important but also more competitive from a recruitment perspective.

Lastly, online ETPs are becoming increasingly vital for working professionals, to support the goal of lifelong learning, and those seeking micro credentials. They allow these individuals to expand their knowledge and stay updated with industry trends without interrupting their careers. Additionally, online programmes enable these individuals to acquire job-relevant skills quickly, to enhance their career aspirations in a rapidly evolving job market.

Figure 21: Distribution of ETPs by format and method



4.9. English requirements

In general, IELTS requirements for ETPs vary per region and destination. Thus, analysing these requirements may give an indication of the thresholds placed on prospective students seeking to study online.

For instance, most institutions in the EHEA region ask for higher IELTS scores between 6.0 and 6.5, with an estimated 86% of online programmes asking students for these scores. This trend is also visible in the MENA region (82%), while most programmes in the SSA ask students for an IELTS score of 7.0. That being said, it is important to note that only a third of the programmes offered across these regions explicitly request a particular IELTS score.

Figure 22: Distribution of IELTS requirements per region

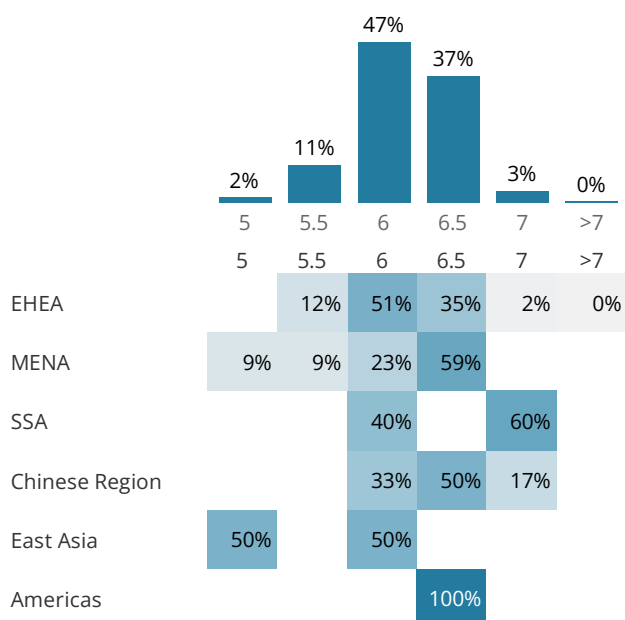


Figure 23 indicates the supply of online programmes according to discipline area and study level, with the size of each bubble representing the supply of programmes offered. The figure shows that while the analysis by discipline and study level confirms the observed split in scores, there are also variations in the score requirements for different study levels. Two key observations are:

- Across all disciplines, the IELTS score required for online master's is higher than for bachelor's. For instance, Medicine, Social Sciences, Law, and

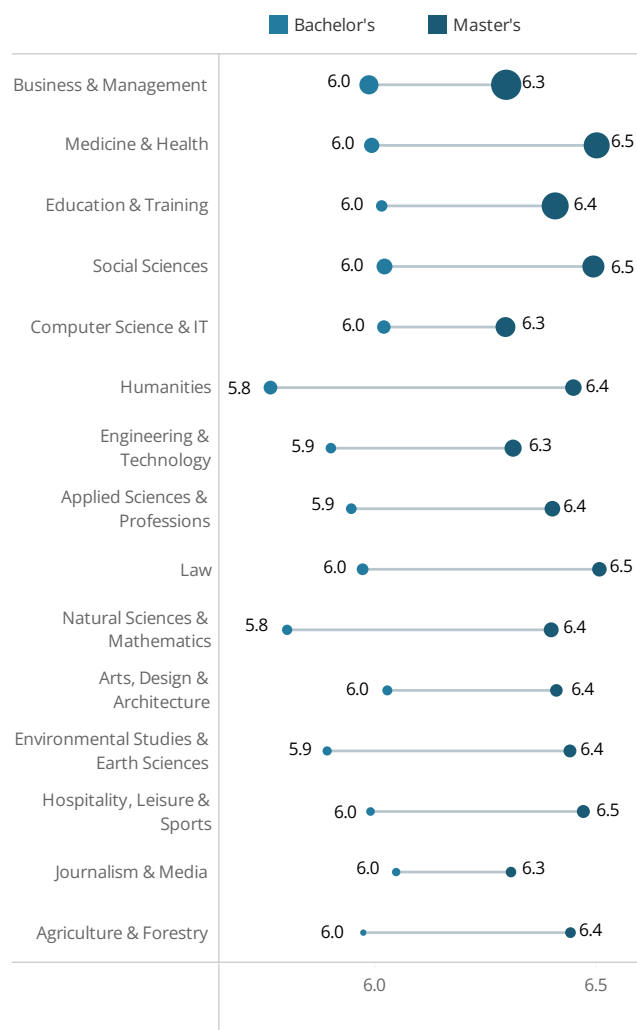
Hospitality all require scores of 6.5 for online master's, compared to a score of 6.0 for bachelor's.

- The IELTS scores required for bachelor's are quite uniform across most disciplines (6.0) which suggests a standard baseline proficiency level that is required for online ETPs offered across various fields at this level.

It is also worth noting that scores of less than 6.0 are not common across either study level. This could be due to the extra support that would otherwise be needed by the students to improve their English proficiency, which may prove challenging in an online setting.

The higher IELTS scores for online master's may be attributed to more HEIs requiring a more thorough command of English when looking to specialise at a postgraduate level.

Figure 23: Distribution of IELTS requirements by discipline, study level, and programme supply



5. Conclusion

5.1. Overview of global trends

By June 2024, Studyportals identified more than 15,000 online English-taught programmes (ETPs) at the bachelor's and master's levels. Notably, 92% of these programmes are offered by the Big Four study destinations: the UK, the US, Australia, and Canada. Compared to 2019, the global supply of such programmes grew by 123%. Additionally, the number of programmes offered by suppliers outside the Big Four nearly doubled, increasing from 623 programmes in 2019 to 1,212 by June 2024.

Online programmes have grown significantly in STEM fields such as Applied Sciences and Computer Science & IT, as well as in Business & Management and Education. Approximately 51% of all online ETPs (Education and Training Programmes) outside the Big Four are now concentrated in Business & Management and Computer Science & IT, with notable increases since 2019 in areas like Business Administration, International Business, Digital Marketing, Information Technology (IT), and Artificial Intelligence.

There is a broad range of programmes that institutions launch as online offerings to appeal to a diverse audience. Popular titles like Business Administration are widely available across the Big Four and other study destinations. However, certain programmes such as Nursing, Criminal Justice, Psychology, Management, and Cybersecurity have seen increased supply in the Big Four by June 2024 but are less focused upon in other regions. This disparity presents opportunities for other study destinations to consider offering these in-demand programmes, aligning with student needs and labour market trends.

5.2. Regional supply

While the EHEA region is the largest supplier with 823 online ETPs, there has been a significant rise in online programmes supplied from other regions such as SSA, MENA, and the Americas. Asia was highlighted as a particular region that has a relatively low supply of online

ETPs, with no online programmes at Bachelor's or Master's level offered in China.

In addition to this, Studyportals data revealed that 100% of HEIs in the respective regions of Asia offer fewer than 10 online programmes, and a significant 92% of HEIs in the EHEA region fall within the same supply range. In other observed regions, including the Big Four, the distribution of HEIs by portfolio size is more varied.

As a result of the global pandemic, countries outside the Big Four have begun to increase their supply of online bachelor's and master's programmes. Studyportals data has noted that this trend is likely to remain sustained, with more programmes entering the higher education market.

5.3. Institutional quality and rankings

The 2024 World University Rankings (WUR) revealed regional differences in the share of ranked and unranked institutions and online programmes. In the Americas, 50% of institutions with online programmes are unranked, yet 73% of online ETPs are provided by ranked institutions, indicating a disparity in quality.

The EHEA, MENA, and SSA regions were seen to have a higher proportion of ranked institutions and online programmes, suggesting significant progress within their tertiary education systems and programme quality that meet the WUR's criteria.

Conversely, despite the UK and Canada having established higher education systems, each country displayed high shares of unranked institutions offering online ETPs, indicating areas that may require further development and evaluation.

5.4. Higher education hubs

Although not a primary consideration for online students, Studyportals defined educational hubs as cities hosting at least 5 institutions offering online programmes. Most of these cities are in the EHEA region, underscoring its key role as an online ETP supplier outside the Big Four, with

Barcelona, Berlin, Madrid, Milan, and Paris serving as the largest hubs in the region. Other cities like Sharjah, Johannesburg, Dubai, and Durban also host a fair number of institutions offering online programmes, highlighting their growing prominence.

In terms of supply trends, institutions located in Berlin and Barcelona were found to be proactive in supplying more online ETPs alongside institutions based in Kingston, Jamaica, and Durban, South Africa.

Although cities like London, Barcelona, Chicago, New York, Toronto, Sydney, Paris, Dublin, Berlin, and Cardiff can be considered as digital hubs of online education, online ETPs are more dispersed across continents rather than being concentrated in specific regions. While 29 cities worldwide each host over 5 institutions, offering nearly 2,700 online programmes collectively, 882 cities with fewer than 5 institutions each collectively offer nearly 12,750 online ETPs. This distribution highlights the widespread availability of online education.

5.5. Focus on emerging fields

Business, Computer Science, and Social Sciences largely form the core focus of an institution's offering, while Medicine and Engineering are considered common staples in an online portfolio, especially in the MENA, Big Four, and EHEA regions, but less so in SSA.

Market-specific disciplines vary by region, reflecting local development needs, while marginal disciplines cater to niche professional areas, with the MENA region notable for slightly higher shares in Agriculture & Forestry and Journalism & Media.

The MENA, SSA, and East Asian regions are highly focused on Business & Management, with East Asia indicating 73% of its online ETPs in Business fields. Representing the Chinese Region, Hong Kong focuses its online ETPs on Hospitality, Leisure & Sports, while the Americas have a notable presence in Education & Training.

5.6. Adaptable formats

In relation to study levels, most regions provide less than 50% of their programmes at the bachelor's level, especially in the MENA region and South Asia, suggesting these regions may be better equipped to support online master's students.

For instance, the EHEA region is focused on online master's programmes, but their presence is low, with only 8%-10% offered online by major suppliers like Germany and Spain. It was also seen that most EHEA countries still rely heavily on on-campus programmes for their ETP portfolios, with Cyprus (15%) and Switzerland (12%) displaying relatively higher shares of online programmes.

In contrast, SSA countries have a 68% share of online bachelor's programmes compared to master's, and the Americas have a 46% share. This may be due to these regions possibly adopting goals to attract international students through online bachelor's programmes who might otherwise not choose to study in these destinations in person.

Full-time on-campus offers are the main focus in South Asia (98%), MENA (88%), and the Chinese Region (87%), indicating how institutions primarily focus on providing residential learning experiences, with few regions offering full-time online programmes.

Other regions like the Americas, East Asia, and SSA offer more versatile formats, allowing students to choose their preferred study method. As domestic policies affect international student mobility, online ETPs may become a more feasible and competitive option. Such programmes have also become a strong option for working professionals, lifelong learners, and those seeking micro-credentials, allowing them to remain in tune with innovative development and acquire job-relevant skills without discounting their career progression.

5.7. English proficiency requirements

Although only a third of online programmes outside the Big Four explicitly specify an IELTS score, 86% and 82% of programmes in the EHEA and MENA regions respectively ask for scores between 6.0 and 6.5. Moreover, 60% of online programmes in the SSA region require an IELTS score of 7.0.

Across all disciplines, IELTS scores required for online master's programmes are higher than at the bachelor's level, with fields like Medicine, Social Sciences, Law, and Hospitality requiring 6.5 for master's and 6.0 for bachelor's. The uniformity of an IELTS score at 6.0 for online bachelor's suggests a standard baseline proficiency for online ETPs, with scores lower than this being uncommon. Higher IELTS scores for master's programmes may reflect HEIs' expectations for stronger English proficiency by students seeking to study specialised fields.

6. Appendix

Table 12: Online ETPs in 2019-2024

Destination	ISO Code	Jan 2019	Jun 2024
Germany	DE	23	201
Ireland	IE	110	145
Spain	ES	63	115
New Zealand	NZ	57	85
Switzerland	CH	40	106
Cyprus	CY	82	38
Italy	IT	62	47
South Africa	ZA	8	70
United Arab Emirates	AE	19	64
Jamaica	JM	2	55
Sweden	SE	33	36
France	FR	11	25
Greece	GR	19	13
Finland	FI	11	24
Malaysia	MY		22
The Netherlands	NL	7	15
Hong Kong	HK	6	8
Malawi	MW		13
Zambia	ZM		12
Puerto Rico	PR	11	10
Singapore	SG	3	7
India	IN		10
Namibia	NA	8	9
Austria	AT	4	8
Türkiye	TR	2	6
Russia	RU		7
Poland	PL	6	5

Malta	MT		7
Belgium	BE	4	7
Lebanon	LB		6
Norway	NO	2	4
Bulgaria	BG	5	3
Estonia	EE	1	3
South Korea	KR	2	1
Northern Cyprus	XC	2	3
Kenya	KE	3	
Czechia	CZ	1	2
Ukraine	UA		2
Uganda	UG		2
U.S. Virgin Islands	VI	1	2
Mexico	MX	2	2
Mauritius	MU	2	
Latvia	LV	2	
Israel	IL		2
Iran	IR		2
Guam	GU	1	1
Grenada	GD	2	
Sri Lanka	LK	1	1
Slovenia	SI	1	
Slovakia	SK		1
Portugal	PT		1
Nigeria	NG		1
Monaco	MC	1	
Luxembourg	LU	1	1
Lithuania	LT	1	1
Denmark	DK	1	
Belize	BZ		1

* Our dataset reflects both the natural increase in global programme supply and Studyportals' commercial objectives to identify and catalogue ETPs. Notable surges in programme supply in some study destinations often result from a combination of the country's efforts to enhance its competitiveness in higher education and Studyportals' data collection initiatives. Despite these apparent spikes, the global share of supply from individual countries remains relatively small and does not significantly impact the findings of this report.

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IELTS - the International English Language Testing System - is the world's most popular English language test for work, study and migration. Jointly owned by the British Council, IDP: IELTS and Cambridge University Press & Assessment, IELTS is trusted by more than 12,500 organisations around the world as a reliable indicator of true-to-life ability to communicate in English. Available on computer, on paper and online, IELTS assesses a test taker's English language proficiency across four skills: listening, reading, writing, and speaking. With a focus on human conversations, IELTS was a pioneer of four-skills English language testing more than 35 years ago and continues to set the standard for English language testing today.

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