

Lifelong Learning fuels Online Learning Evolution, as demand for more flexible University Qualifications grows.



CURRENT LANDSCAPE 2023

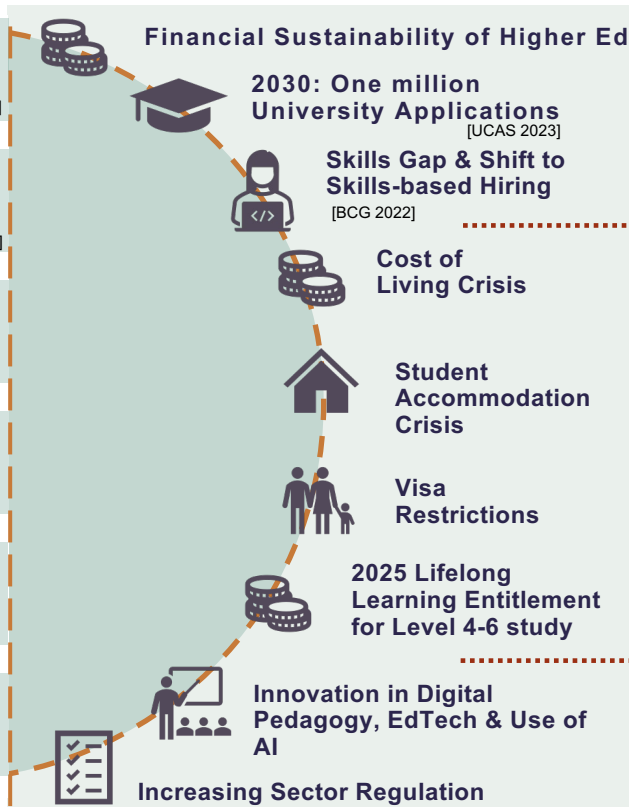
EXPONENTIAL GROWTH IN ONLINE LEARNING WITH DEMAND FOR PGT COURSES PERSISTENT

10% Student Body

- 240,000 Online UG Students (UK 77% International 23%); 3% Growth. [HESA Data 2021/22]
- 170,000 Online PGT Students (UK 54% International 46%); 7% Growth. [HESA Data 2021/22]
- 394 UG degrees (Open University & University London Online market leaders); 3250 PGT degrees (no market leader). [Mosley 2023]
- Business; Computer Science; Health/Medical; Education high demand. Growth in Engineering, Psychology & Creative Industries. [Mosley 2023]
- Biggest growth in student numbers for Universities who partner with an OPM. [EY Parthenon 2023]
- Flexibility; Speed to study; Pay Premium; Brand and Cost Point lead the choice for Online Students. [McKinsey & Company 2023]

CHANGE DRIVERS

SKILLS SHORTAGES, GROWTH IN STUDENT NUMBERS, FUNDING AND TECH PUSHING FOR SECTOR DEVELOPMENT



SECTOR DEVELOPMENTS

MOMENTUM BEHIND LIFELONG LEARNING, ADVANCEMENTS IN TECHNOLOGY AND WIDENING ACCESS TO ADDRESS INDUSTRY AND SECTOR NEEDS



STRATEGIC DISTINCTIVENESS

- HIGH DEMAND PORTFOLIOS PAIRED WITH UNIVERSITY USP COURSES OFFERING FULLY ONLINE QUALIFICATIONS ALIGNED TO INDUSTRY NEEDS.**
- MICRO-CREDENTIALS PROVIDING RAPID RESPONSE TO MARKET CHANGES AND ATTRACTING STUDENTS LOOKING FOR SPECIALISED STUDY.**
- FLEXIBLE CURRICULUM DELIVERY MODELS INC MULTIPLE START DATES, ON-DEMAND DEGREES, SELF-PACED, ASYNCHRONOUS, FLEXIBLE PAYMENT PLANS.**
- COURSES INCREASINGLY ALIGNED STUDENT FINANCE PROVISION AND FOSTERING B2B RELATIONSHIPS.**

OPERATIONAL EXCELLENCE

- DEPLOY TECH ARCHITECTURE TO SUPPORT MORE VARIED FORMS OF ENGAGEMENT AND STUDENT JOURNEY AUTOMATION.**
- ECONOMIES OF SCALE ENABLING SPEED IN COURSE DESIGN AND DEVELOPMENT.**
- GROW CHANGE CAPACITY TO EMBED INSTITUTIONAL VISION, ORG DESIGN AND EMBED SPECIALISED LEARNING DESIGN SKILLS TO CATER FOR WIDER AUDIENCES AND A VARIETY OF EDUCATIONAL EXPERIENCES.**
- USE OF LEARNING ANALYTICS AND DEDICATED STUDENT SUPPORT SERVICES TO DRIVE CONTINUATION, COMPLETION AND STUDENT OUTCOMES.**