

Researching Online Learning...

...Reflections on Techniques and Sources

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THE OBSERVATORY
on Borderless Higher Education

 *i-graduate*
INTERNATIONAL INSIGHT
part of the Tribal Group plc

TRIBAL

21 November 2017

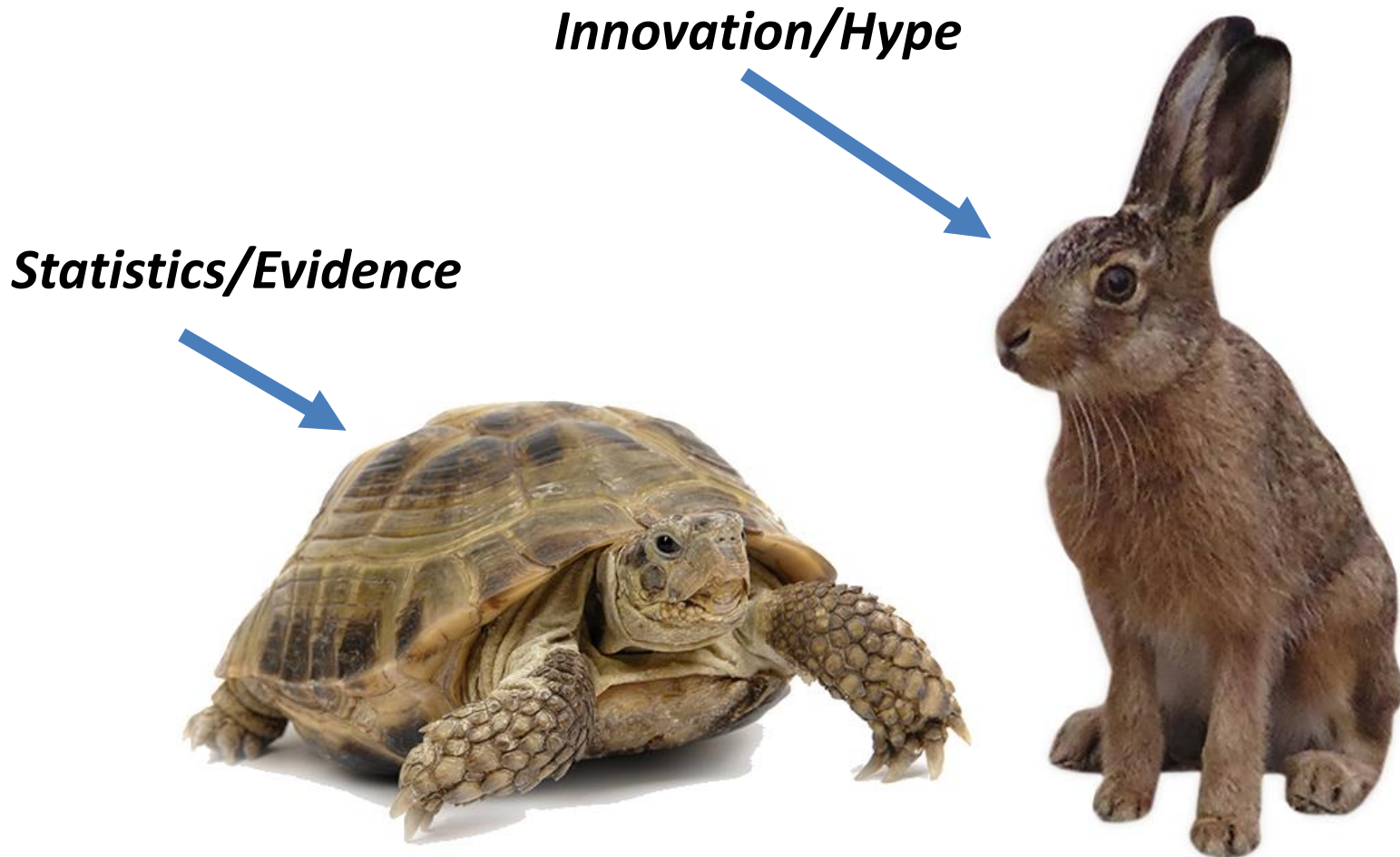
 **EDUVENTURES**

NRCUA
National Research Center for College & University Admissions

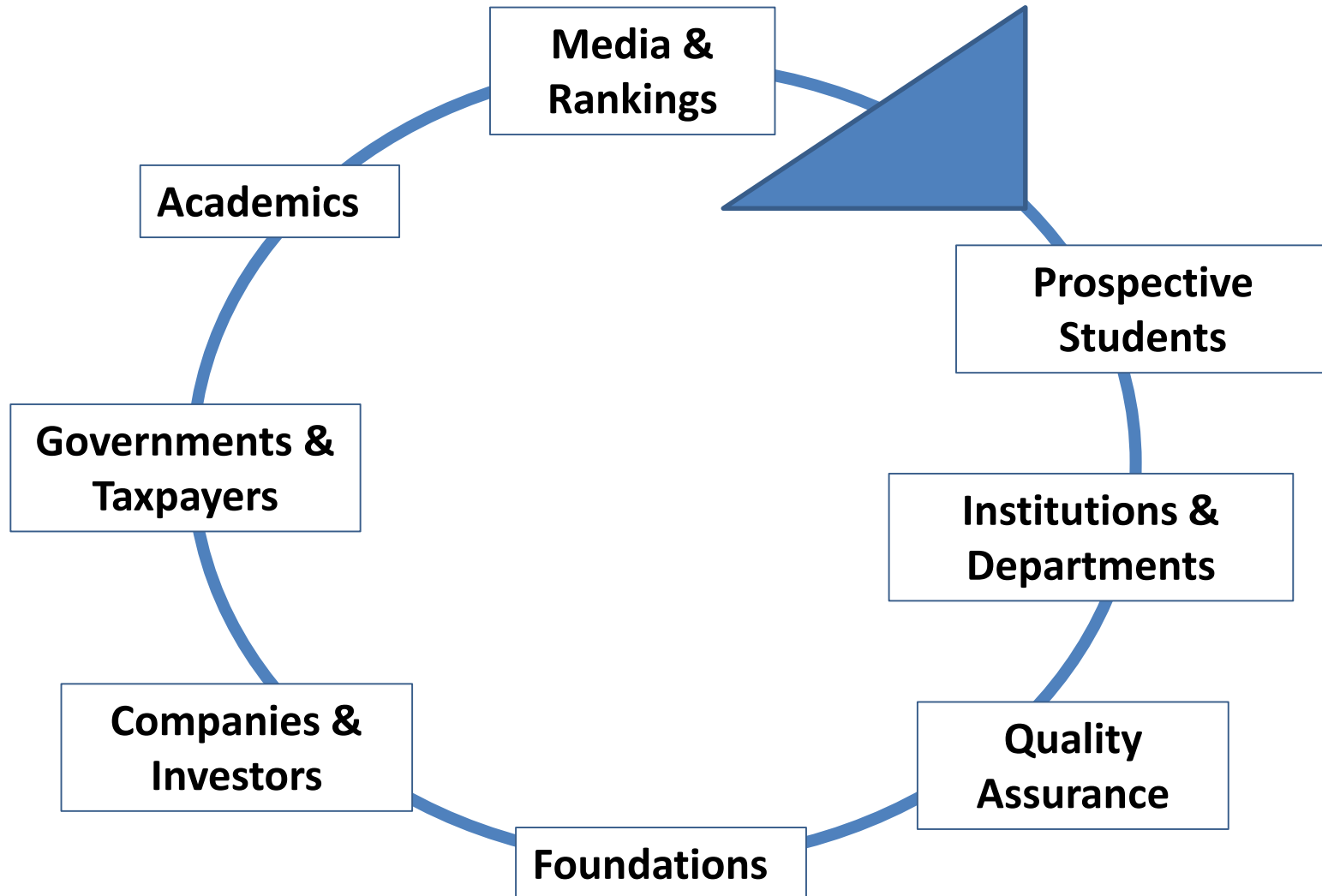
Agenda

- **Who, What, Why, How?**
- Example Evidence- simple/standard
- Example Evidence- complex/non-standard

The Problem...



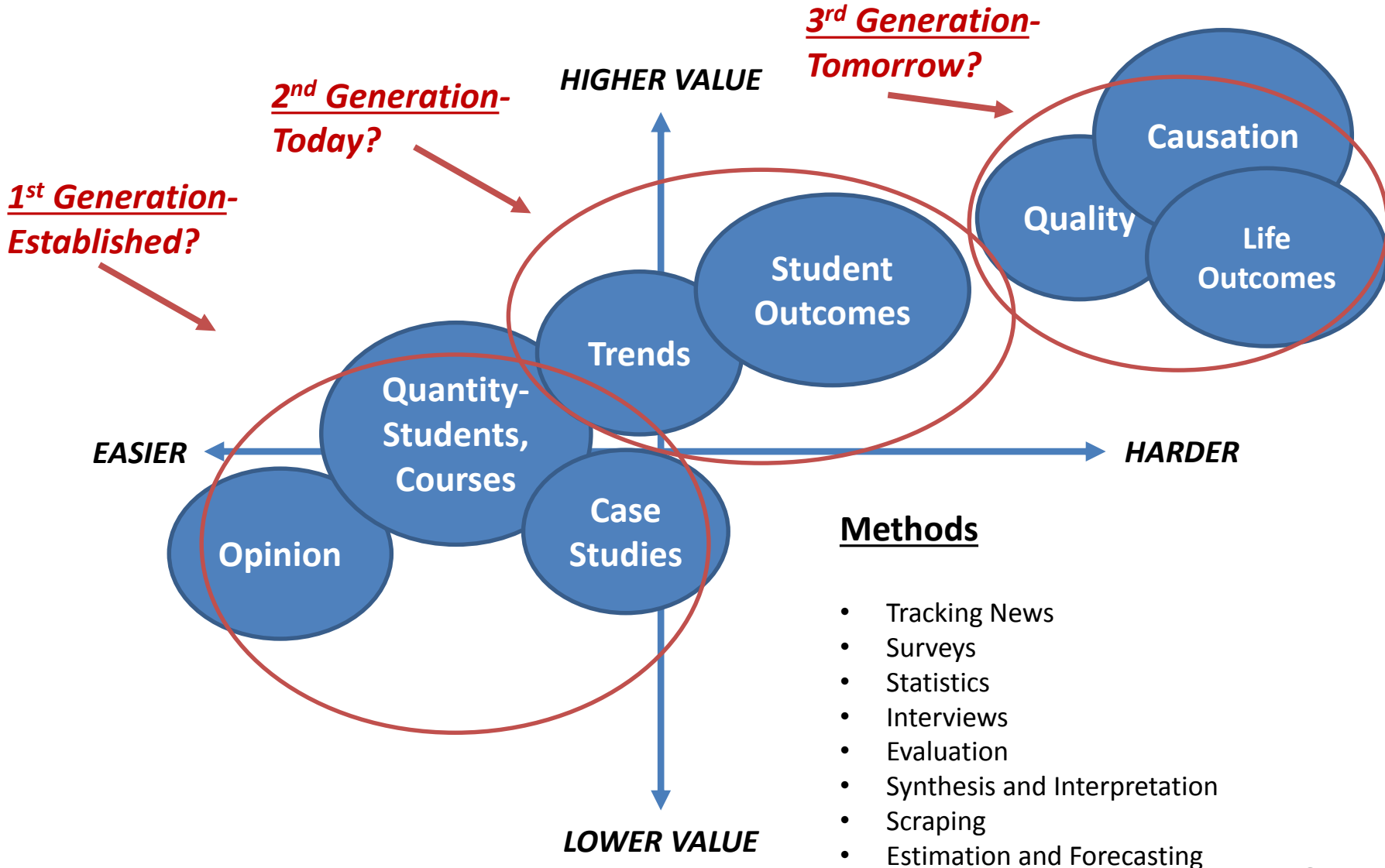
Who wants to know?



What/Why do we/they want to know?

- Is online enrollment growing?
- In enrollment at level x or in field x or demographic x growing online?
- Online as a supplement or alternative to study abroad?
- How competitive is x online market?
- Positioning and differentiation?
- What do students want? Can online widen access?
- How effective is online learning? For whom? Why?
- Can online cuts costs and/or lower prices?
- What are the rules- general and specific to online?
- What are the outcomes? What are the benchmarks?
- What will the online market look like in the future?
- How does country x compare to country y?

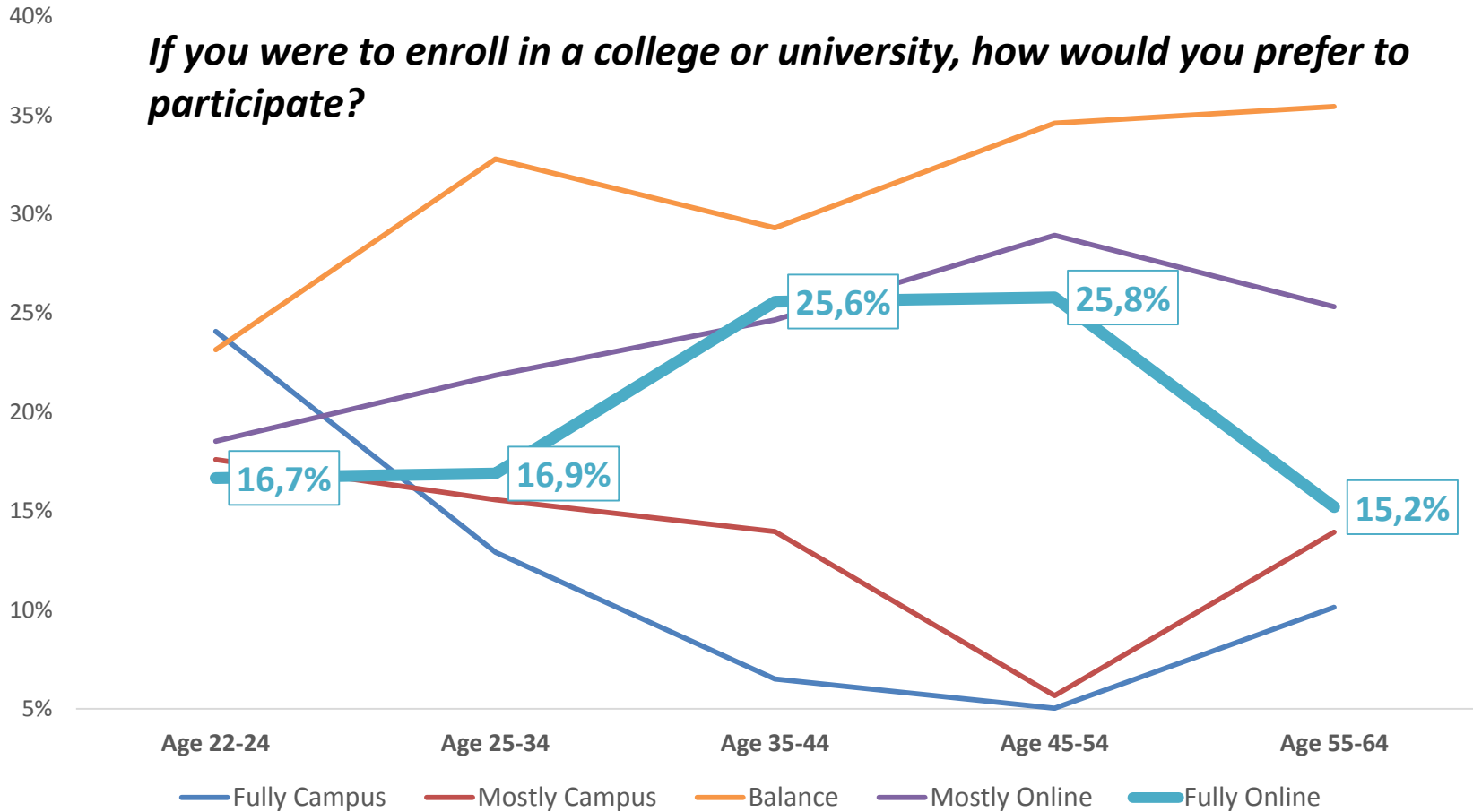
How? Pragmatism and Creativity...



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Gauging Preferences



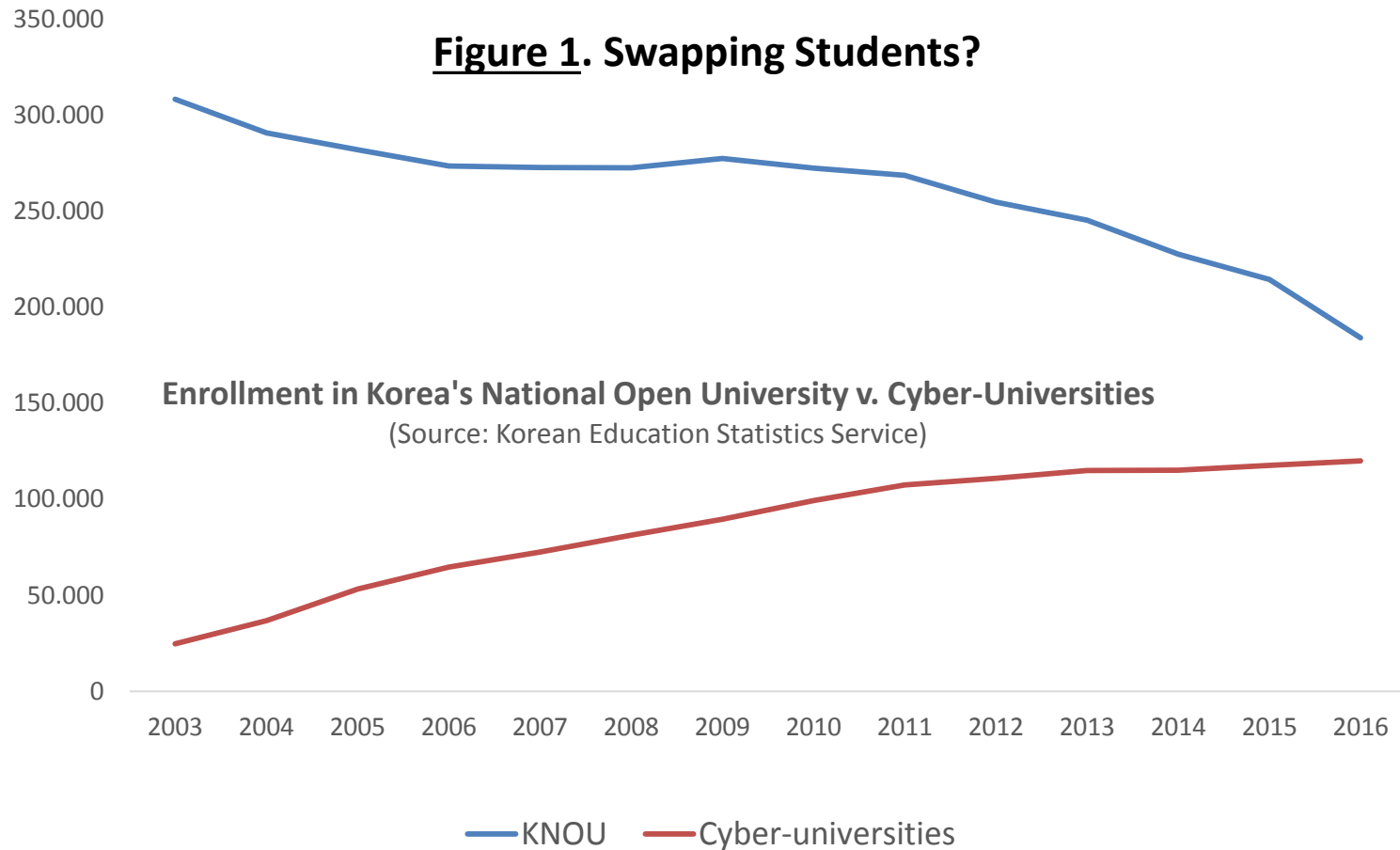
Source: Eduventures 2017 survey of about 860 adult prospective undergraduate students.

Counting Inputs: online has arrived when the government mandates annual statistics

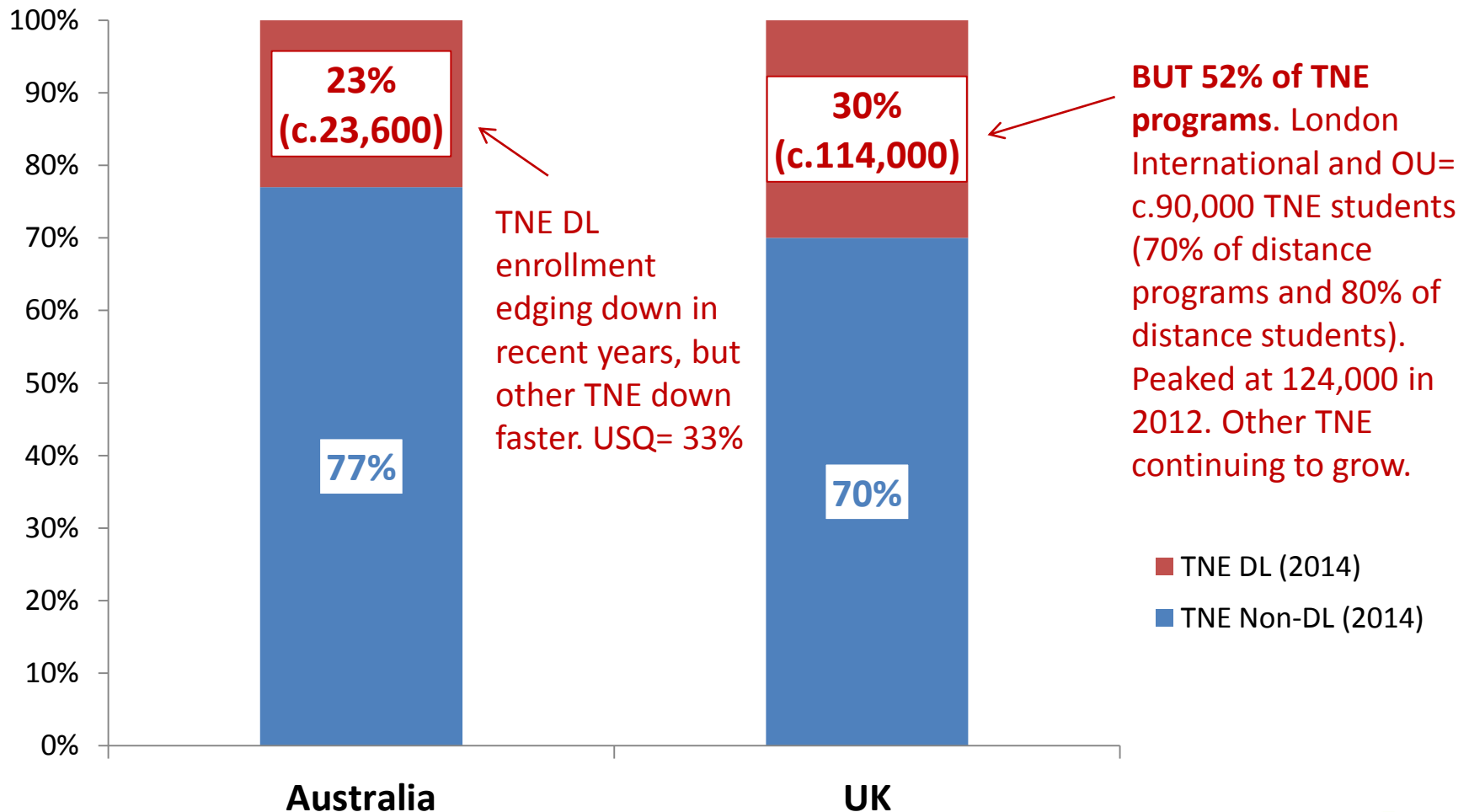
Table 10. Undergraduate “Exclusive” Distance Learning Student Headcount (Fall 2012-15)*

Institution Type	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Growth from 2012	Growth from 2014	% of All Undergraduates (Fall 2015)
Public 4Y	366,675	398,616	445,303	474,105	29%	6.4%	6.9%
Private Nonprofit 4Y	255,072	281,493	334,071	364,712	43%	9.2%	13.4%
For-Profit 4Y	682,415	621,096	605,291	536,398	-21%	-11.4%	60.1%
Public 2Y	657,117	662,821	690,151	717,537	9%	4%	11.4%
Private Nonprofit 2Y	798	822	814	1,204	51%	48%	2.4%
For-Profit 2Y	21,681	19,322	21,600	10,514	-52%	-51%	3.8%
TOTAL	1,983,758	1,984,170	2,097,230	2,104,470	6%	0.3%	12.3%

Online v. Distance



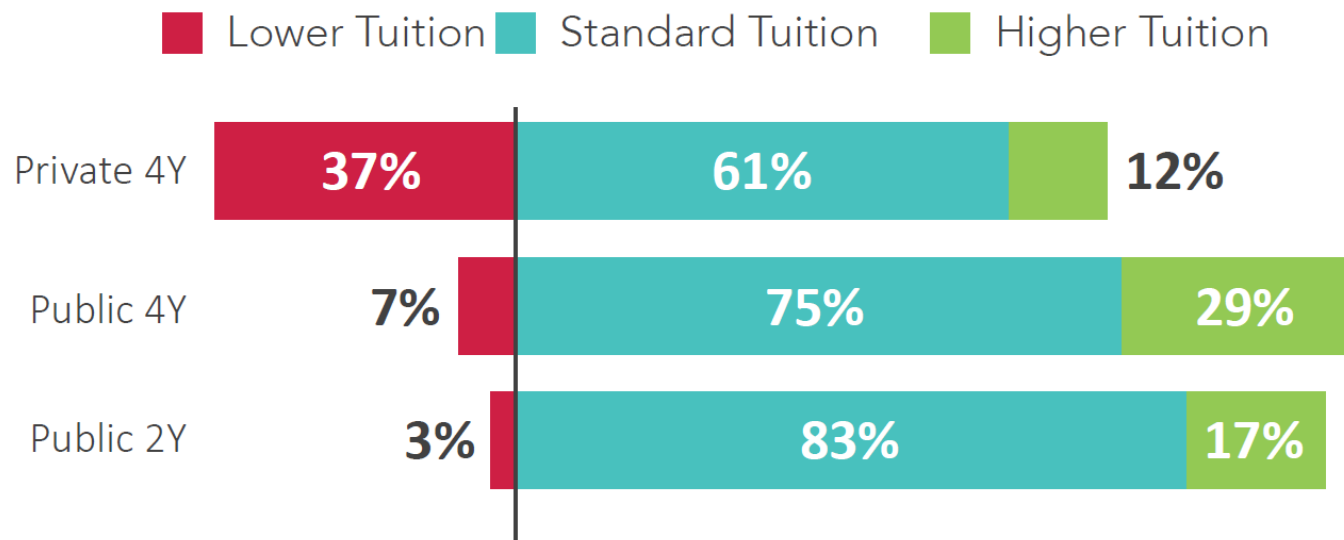
Country Comparisons



Source: Australia DET and UK HESA data and Observatory estimates.
Excludes inactive Oxford Brookes/ACCA TNE students.

Asking Institutions About Policy and Practice

Figure 11. Tuition Rates for Online Students



Synthesis, Interpretation, Recommendation

Excerpt from OBHE's recent article about online learning in India- *MOOCs Go, Online Degrees STOP (April 2017)*

Conclusion

Distance learning plays an out-sized role in Indian higher education, but online learning has both been exuberantly embraced and held at arm's length. Rather than treat online as just another delivery mode, India's regulators have called a halt to innovation while special rules and guidelines are drawn up. India's universities are still waiting. On the contrary, worldwide enthusiasm for MOOCs persuaded the government to throw caution to the wind and offer academic credit, a step few other countries have contemplated.

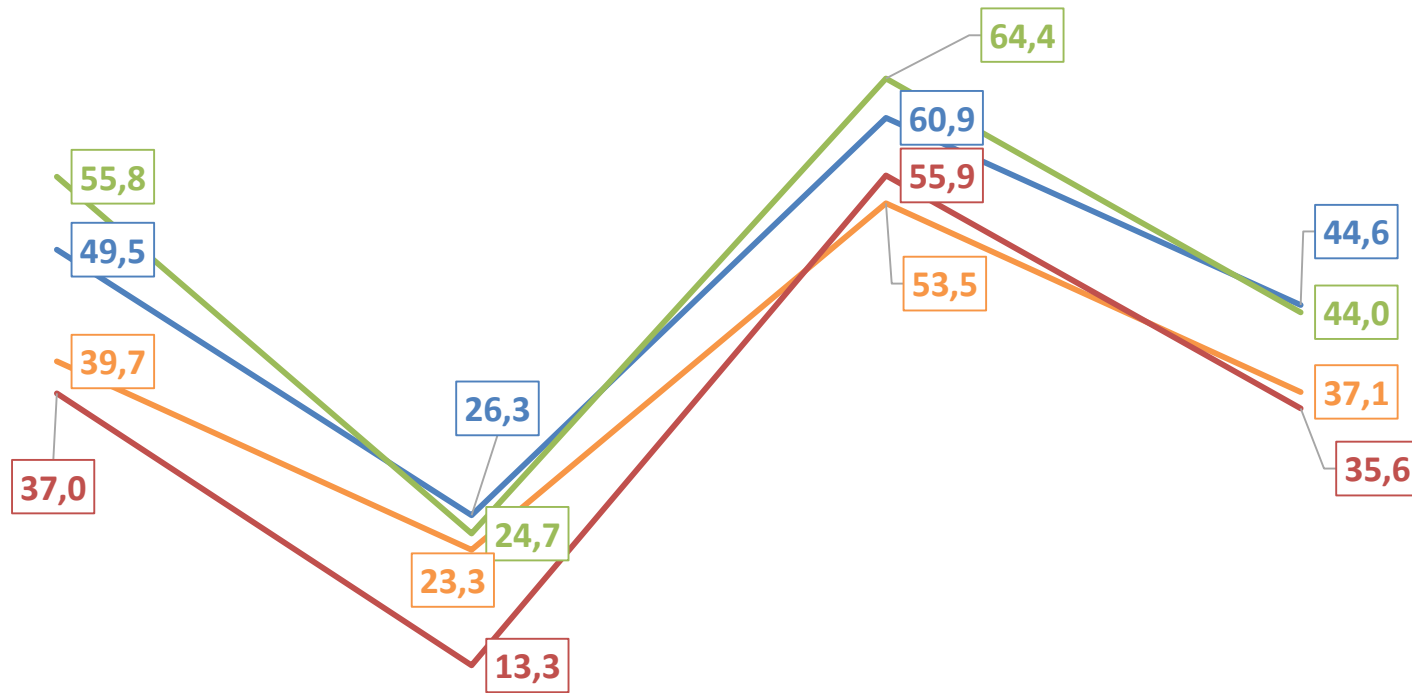
It is not yet clear how SWAYAM is doing, and whether MOOCs will help India take higher education to yet bigger scale. Reading between the lines the experience with the SAKSHAT portal serves as a reminder that the latest technologies can quickly become outdated. Online courses without a legal framework for fully online degrees can create barriers for students, as well as make innovation hard to track and success tough to quantify. The SAKSHAT evaluation report did not offer much in the way of enrolment, usage or outcomes data. It is easier to count online courses launched than judge their impact.

Constrained Internet bandwidth may suggest limited scope for online degrees for the time being, but better to let Indian universities and colleges experiment now before connectivity catches up. Regulation of distance learning in India is nothing if not formidable and could be quickly adapted to accommodate online delivery. MOOC innovation is helpful but India's stock of human capital would be much weaker today if the country had not embraced distance degrees in decades past.

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Emerging: Benchmarking Online Outcomes



First-Time, Full-Time

First-Time, Part-Time

Not-First-Time, Full-Time

Not-First-Time, Part-Time

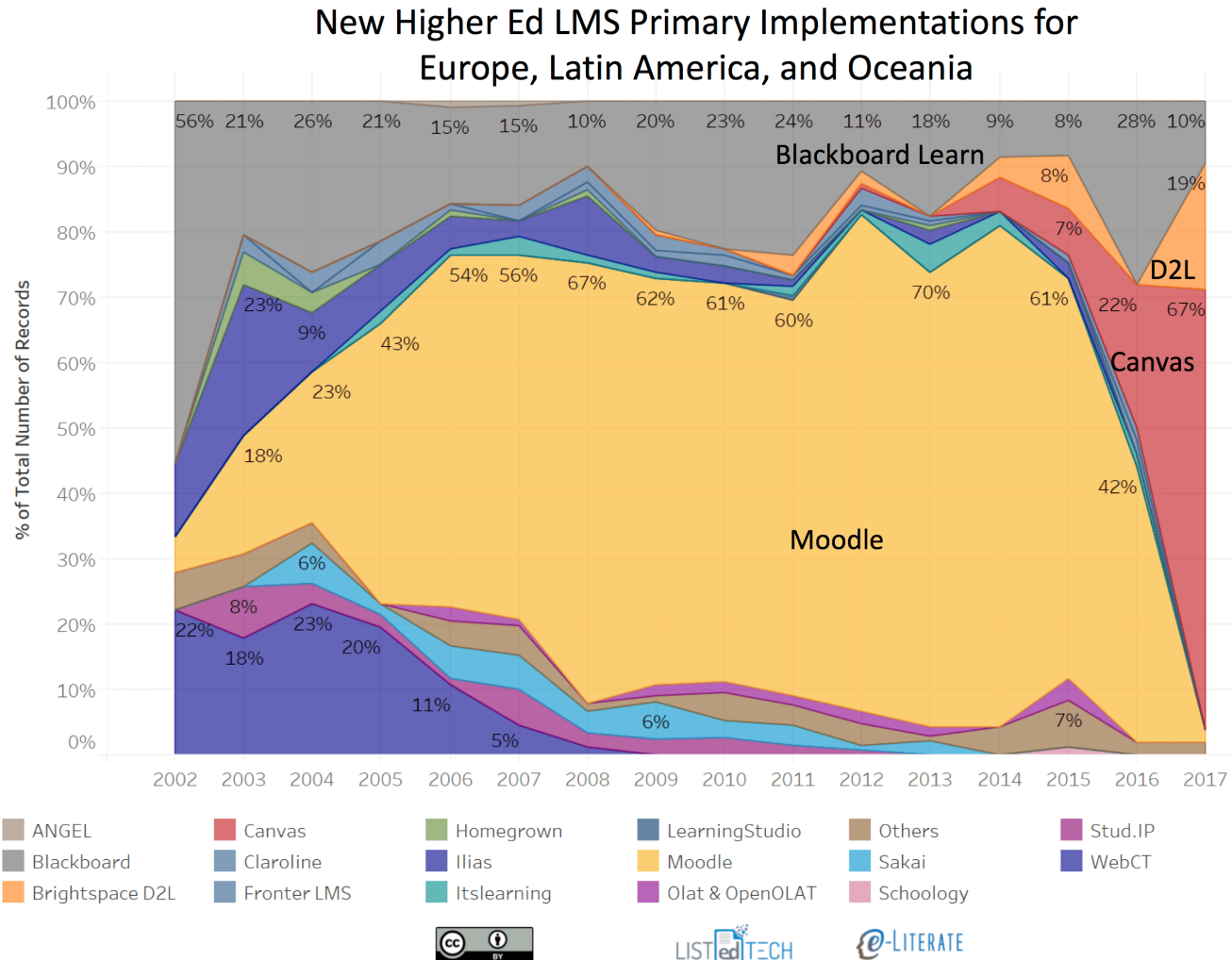
Public 4Y

Private 4Y

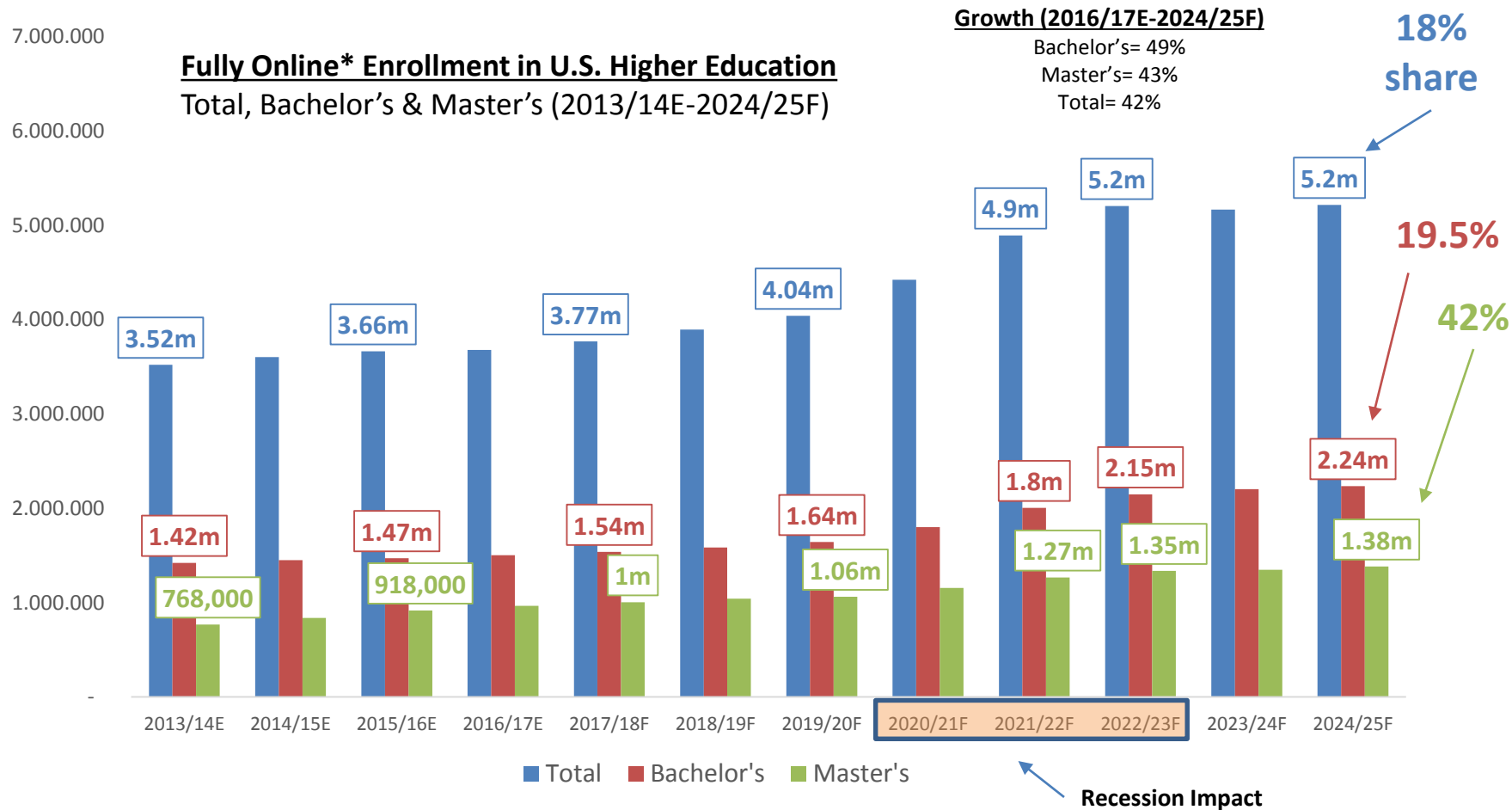
For-Profit 4Y

Fully Distance

No Need to Ask: Which Institutions? Which Technology?



Estimating & Forecasting Online: easy and hard



Source: Eduventures estimates and forecasts drawing on IPEDS, NSCH and Census data. Enrollments are 12-month unduplicated. Title IV schools and for-credit only. * "Fully online" includes vast majority online programs that offer modest or optional offline components.

Persistent challenges for researchers of online learning...

- Consistent definitions- between institutions, systems and countries
- Languages, terminology, conventions
- Calling out different types of online learning
- Limited variables (e.g. level, subjects, demographics)
- Limited trend data
- Buried data and reports
- Quantitative research- getting much better, lots of potential, but...
- Qualitative research- the only way to surface certain evidence- is difficult, time-consuming and expensive
- Impact of online learning still largely out of focus
- Is data now running ahead of analysis, particularly cross-border?

Thank you

The Observatory on Borderless Higher Education

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