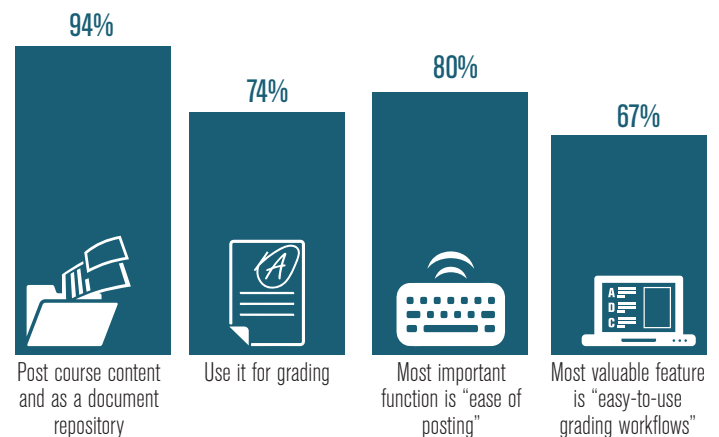# TRENDS IN ONLINE LEARNING

OBSERVATIONS AND CONCLUSIONS

88% of surveyed responders currently have their courses online. Of those who don't already, half intend to go online in 2014.

Online program growth is most impeded by lack of a coherent online strategy, faculty resistance to putting courses online, and funding.

By far the biggest growth driver in putting course content online is faculty developing their own online content (84%).

LEARNING MANAGEMENT SYSTEMS ARE USED FOR A VARIETY OF FUNCTIONS

94%	74%	80%	67%
Post course content and as a document repository	Use it for grading	Most important function is "ease of posting"	Most valuable feature is "easy-to-use grading workflows"

RATE STRONG ONLINE PROGRAMS AS CENTRAL TO ATTRACTING & RETAINING STUDENTS

★ ★ ★ ★ ★

64% rate this as a 4 or 5 in importance where 5 is critically important.

EXPECTED ANNUAL GROWTH IN ONLINE LEARNING PROGRAMS

59% expect 10-25% annual growth

15% expect to see more than 25% growth.

PROGRAM OVERVIEW

In February 2014 Gatepoint Research invited selected leaders from universities to participate in two surveys themed Usage Trends in Learning Management Systems and Online Learning and Engagement Strategies.

200 candidates involved in online learning, e-learning, distance learning, academic technology, remote learning strategy, and web conferencing were invited via email to participate in the study.

Survey participants were senior education professionals who are advocates for the use of technology in the classroom.

100% of responders participated voluntarily; no one was engaged using telemarketing.

OBSERVATIONS AND CONCLUSIONS

LEARNER ENGAGEMENT IS ACHIEVED THROUGH A MIX OF TRADITIONAL AND NEW APPROACHES

82% Group Projects

72% Office Hours

53% Blogs

54% In-class Polls

53% Flipped Classes

THERE WERE MULTIPLE MOTIVES REVEALED BY THOSE SURVEYED ABOUT WHY THEY INVEST IN ONLINE PROGRAMS

79% Attract new/ different students
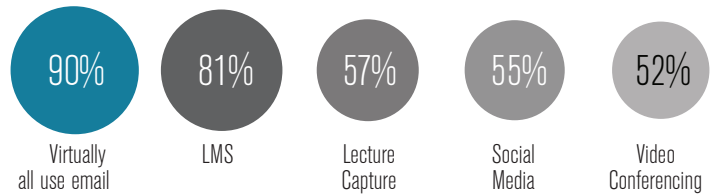
67% Revenue potential

62% Student retention

USE A BLENDED MODEL OF IN-CLASS AND ONLINE COURSES

49% of the institutions surveyed offer at least a quarter of their courses in-class and online.

22% of the institutions surveyed offer more than half their courses in-class and online.

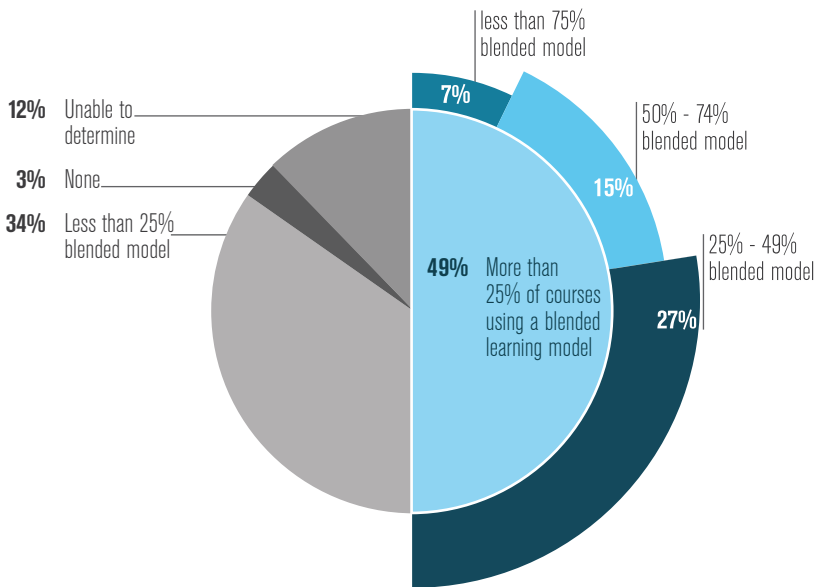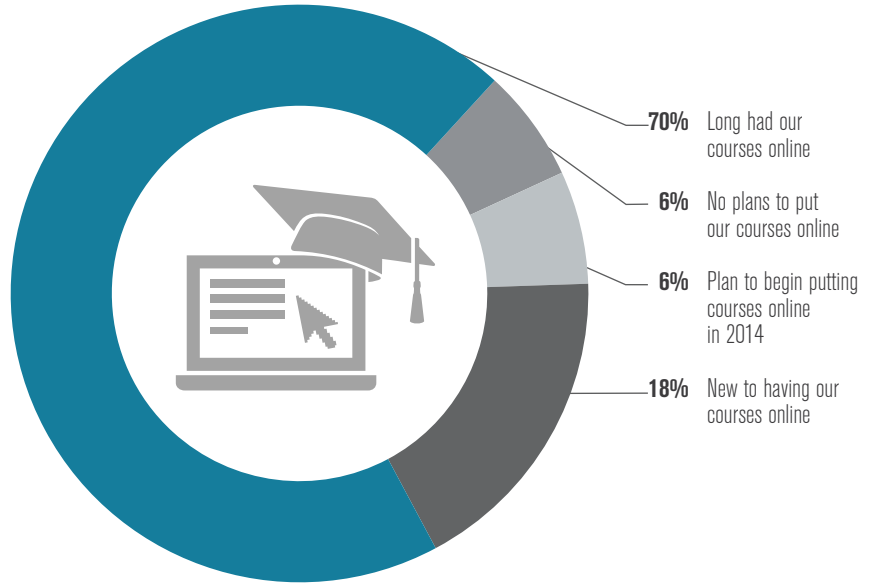## RESPONDERS REVEALED THEY CURRENTLY USE A WIDE VARIETY OF COLLABORATION AND COMMUNICATIONS TOOLS

90% Virtually all use email

81% LMS

57% Lecture Capture

55% Social Media

52% Video Conferencing

TOOLS TO FOSTER CONNECTION AND COMMUNITY IN THEIR STUDENT POPULATION

52% Newsletters

46% Webcasts

39% Targeted Facebook Pages

51% cite faculty skepticism as the top challenge for online learning.

WHERE ARE YOU TODAY WITH OFFERING YOUR COURSES ONLINE?

88% of surveyed responders already have their courses online. Of those who do not already, half intend to go online in 2014.

70% Long had our courses online

6% No plans to put our courses online

6% Plan to begin putting courses online in 2014

**18%** New to having our courses online

HOW MANY COURSES CURRENTLY USE A BLENDED LEARNING MODEL, E.G., IN-CLASS AND ONLINE?

Half the institutions surveyed are using a blended model of in-class and online courses for at least 25% of their courses. 22% offer more than half their courses in-class and online.
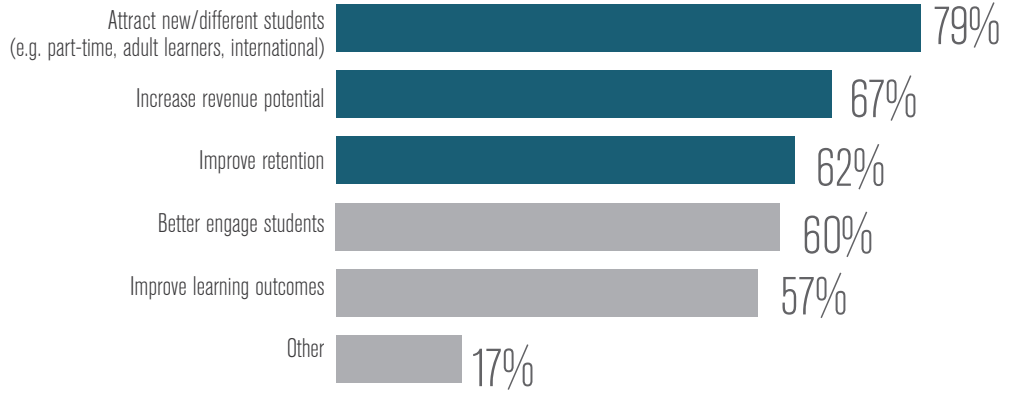
7% less than 75% blended model

15% 50% - 74% blended model

27% 25% - 49% blended model

49% More than 25% of courses using a blended learning model

12% Unable to determine

3% None

34% Less than 25% blended model

WHAT ANNUAL GROWTH IN ONLINE PROGRAMS DO YOU FORECAST?

Most responders expect explosive growth in their online learning programs.

15% Expect 26-50% growth

2% More than 50% growth

24% Less than 10% growth

59% Expect 10-25% growth
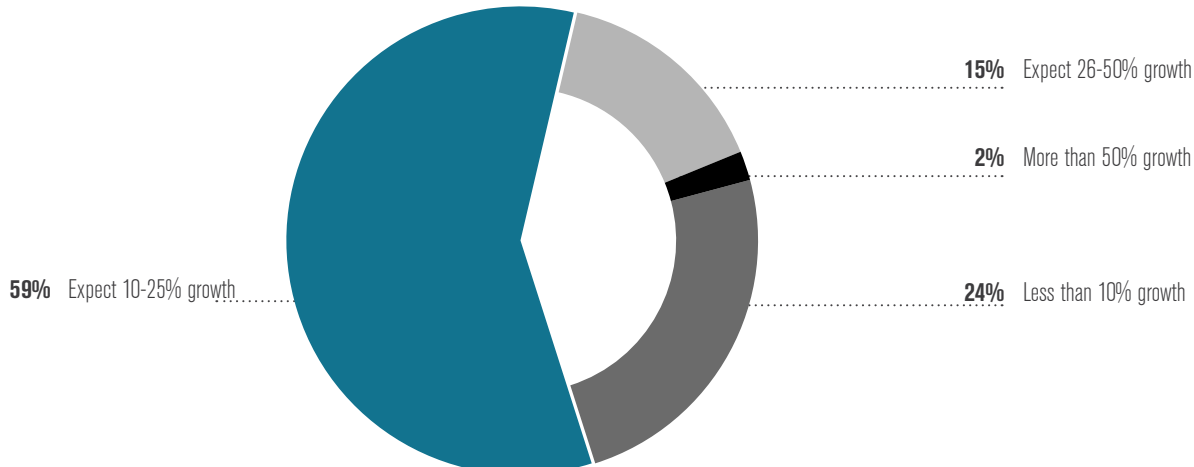
WHAT GOALS DRIVE INVESTMENT IN ONLINE PROGRAMS?

79% of the institutions surveyed cited increasing and diversifying the student body as the main driver behind investment in online programs. Followed by revenue potential 67% and student retention.

Goal	%
Attract new/different students (e.g. part-time, adult learners, international)	79%
Increase revenue potential	67%
Improve retention	62%
Better engage students	60%
Improve learning outcomes	57%
Other	17%

PROFILE OF RESPONDERS: 18% CXO/Dean   17% Vice President   65% Director

WHAT IS HOLDING YOU BACK FROM GROWING YOUR ONLINE PROGRAMS?

Growth of online programs will depend on improved online strategies and faculty support of putting courses online.

35% Nothing holds us back: It's our future

33% Lack a coherent online strategy

31% Faculty resistant to putting courses online

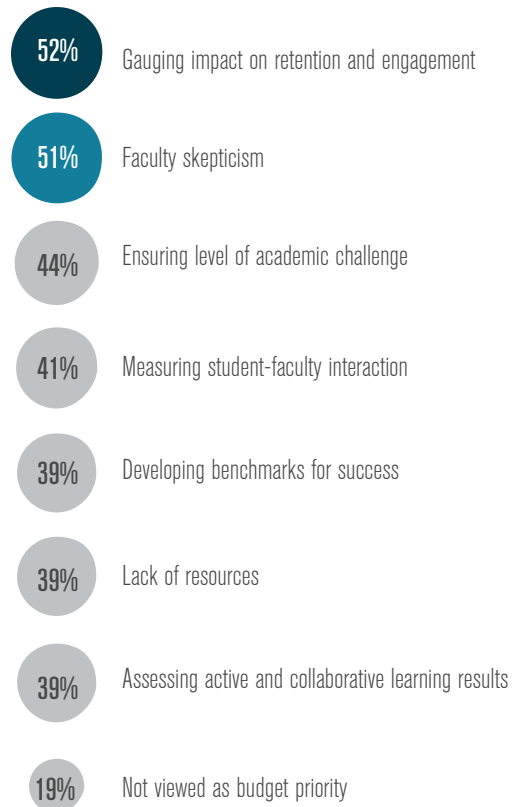28% Lack the funds to support a robust offering

15% Don't have the right talent/resources to manage online programs

8% Some technology problems

7% Fast growth is creating chaos

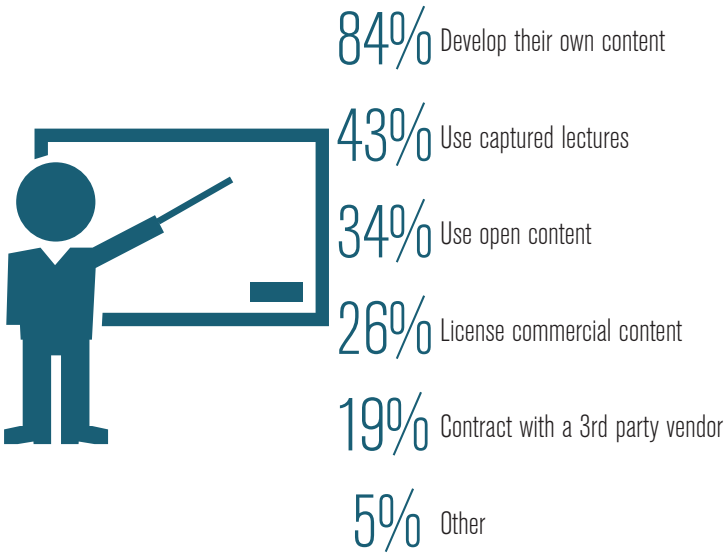## WHAT CHALLENGES ARE YOU FACING REGARDING ONLINE LEARNING?

Faculty skepticism is a top challenge in online learning.

52% Gauging impact on retention and engagement

51% Faculty skepticism

44% Ensuring level of academic challenge

41% Measuring student-faculty interaction

39% Developing benchmarks for success

39% Lack of resources

39% Assessing active and collaborative learning results
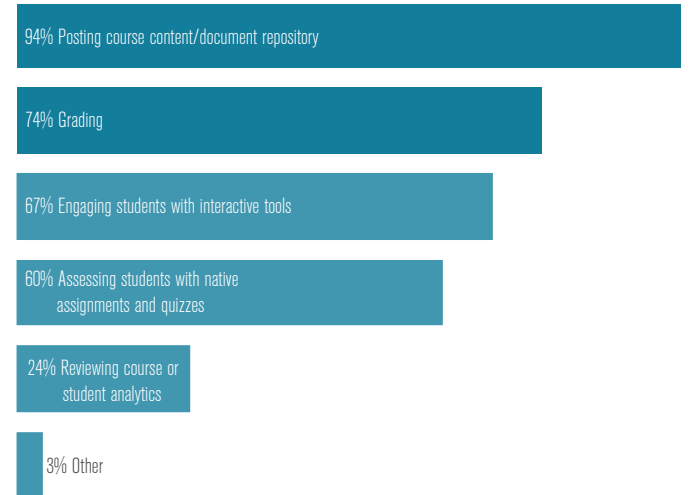
19% Not viewed as budget priority

WHAT TRENDS DO YOU SEE IN HOW YOUR FACULTY IS PUTTING THEIR COURSE CONTENT ONLINE?

By far the biggest growth driver is faculty developing their own online content.

84% Develop their own content

43% Use captured lectures

34% Use open content

26% License commercial content

19% Contract with a 3rd party vendor

5% Other

HOW DO YOU THINK MOST OF YOUR FACULTY ARE USING YOU ORGANIZATION'S LMS?

94% of responding organizations use their LMS to post course content and as a document repository. 74% use it for grading.

94% Posting course content/document repository

74% Grading

67% Engaging students with interactive tools

60% Assessing students with native assignments and quizzes

24% Reviewing course or student analytics

3% Other
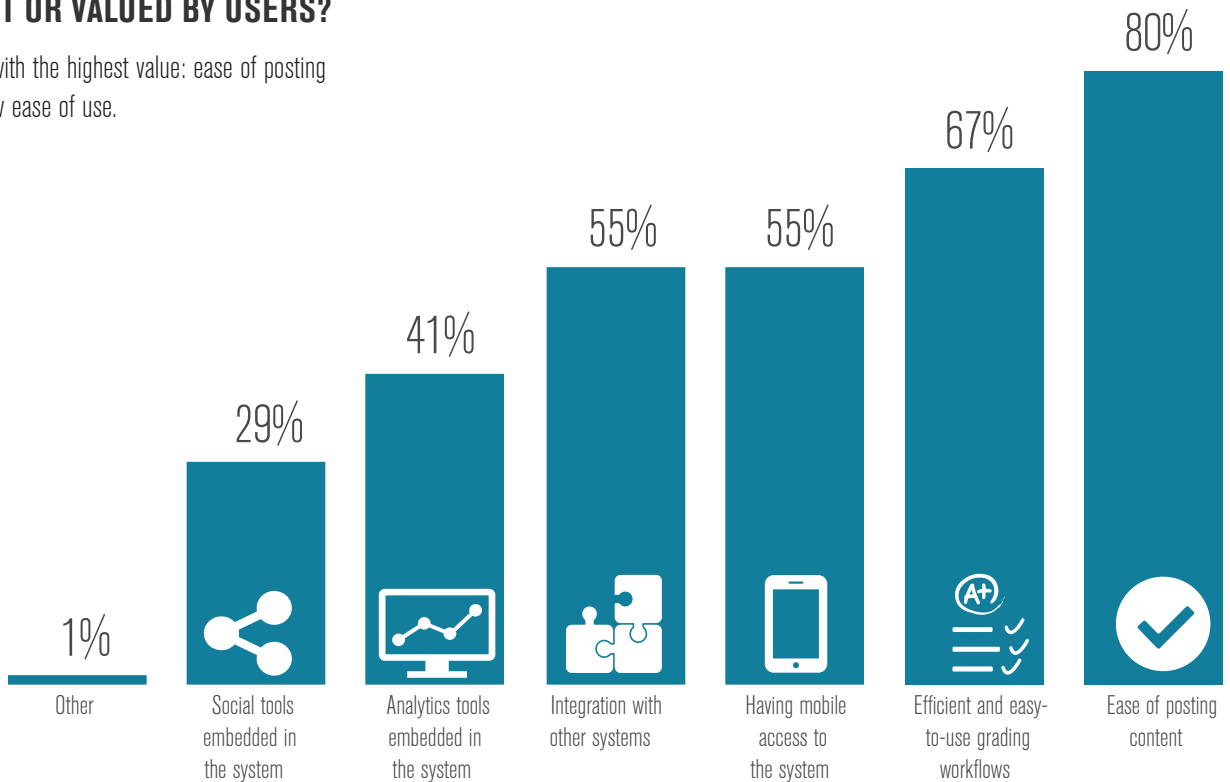
PROFILE OF RESPONDERS:

Survey responders are senior higher education professionals.
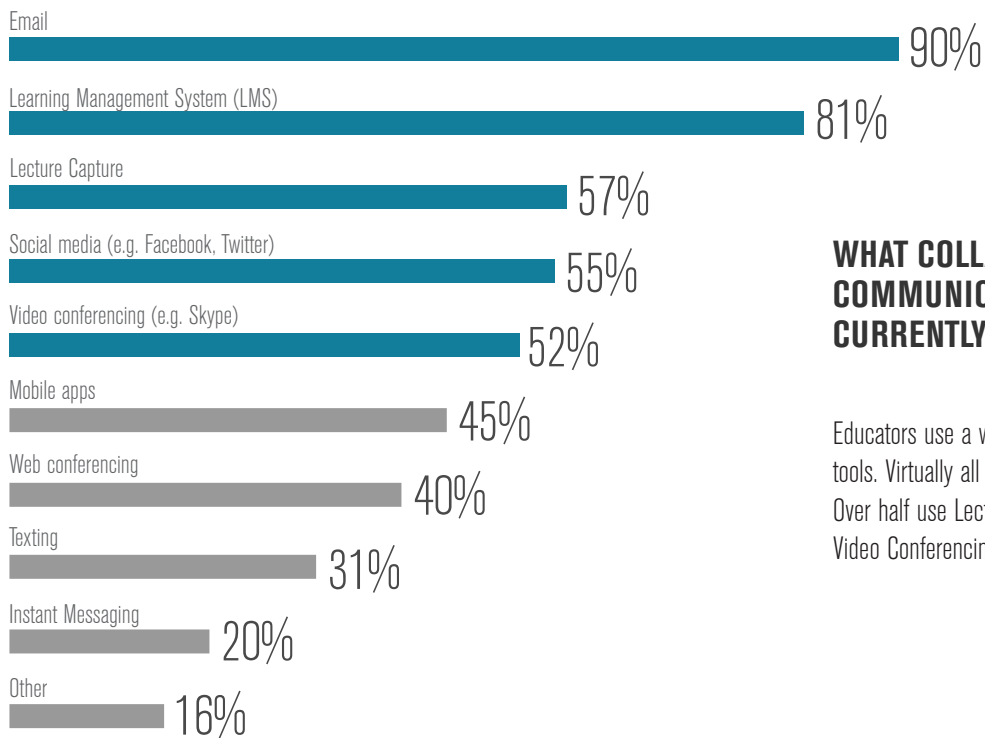
Vice President/Dean 40%   Director 60%

WHAT FEATURES IN AN LMS SYSTEM ARE MOST SOUGHT OR VALUED BY USERS?

LMS functionalities with the highest value: ease of posting and grading workflow ease of use.

1% Other

29% Social tools embedded in the system

41% Analytics tools embedded in the system

55% Integration with other systems

55% Having mobile access to the system

67% Efficient and easy-to-use grading workflows

80% Ease of posting content

Email
90%

Learning Management System (LMS)
81%

Lecture Capture
57%

Social media (e.g. Facebook, Twitter)
55%

Video conferencing (e.g. Skype)
52%

Mobile apps
45%

Web conferencing
40%

Texting
31%
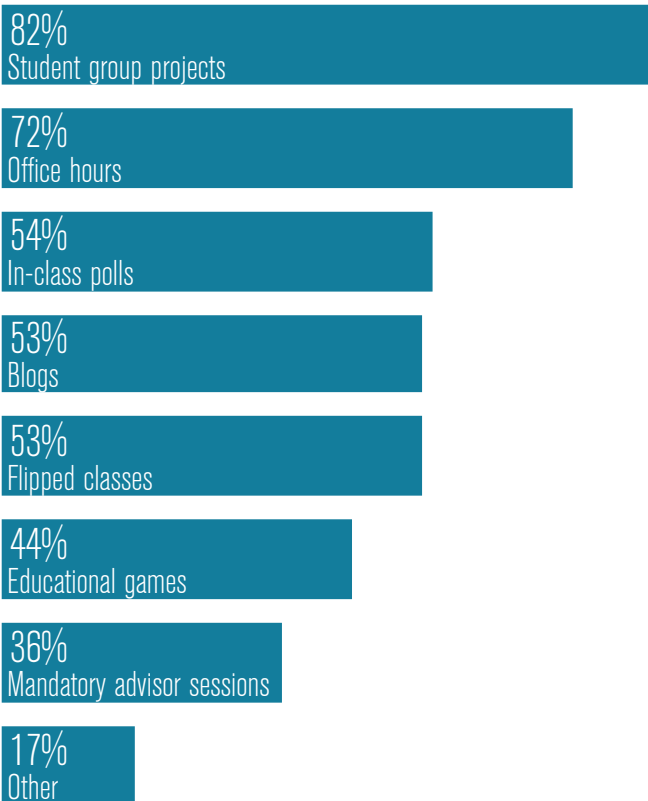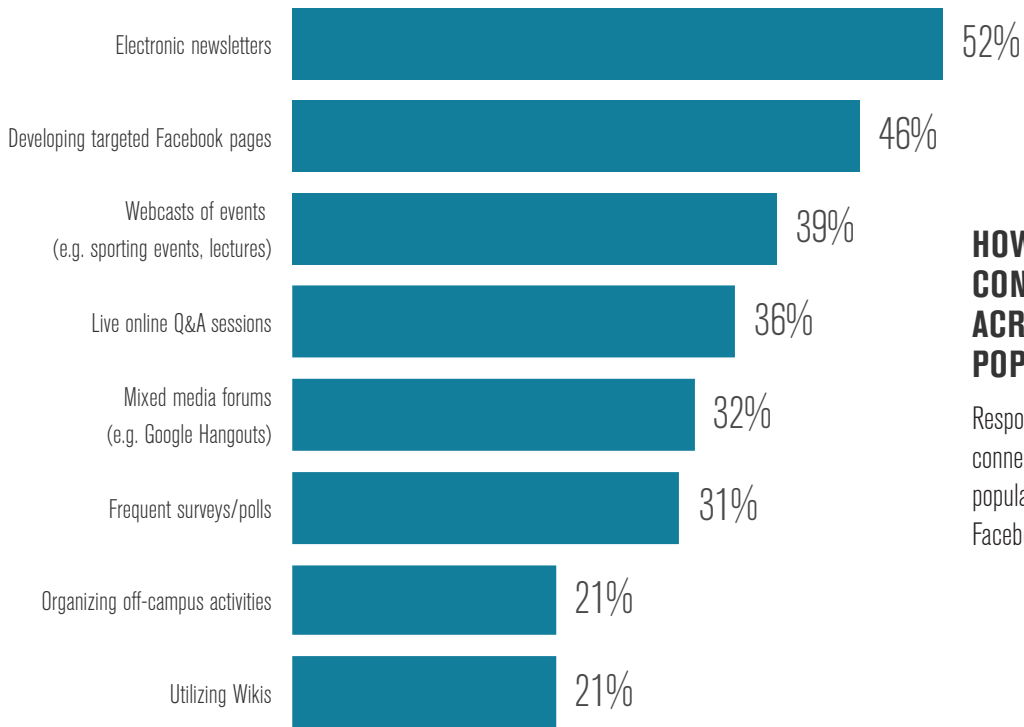
Instant Messaging
20%

Other
16%

WHAT COLLABORATION AND/OR COMMUNICATION TOOLS ARE YOU CURRENTLY UTILIZING IN THE CLASSROOM?

Educators use a wide variety of collaboration and communications tools. Virtually all use email (90%) and most use an LMS (81%). Over half use Lecture Capture (57%), Social Media (55%), and Video Conferencing (52%).

WHAT TOOLS DO YOU CURRENTLY UTILIZE TO KEEP LEARNERS ENGAGED?

Learner engagement is achieved through both traditional and new approaches, with an opportunity to increasingly use new approaches.

82%
Student group projects

72%
Office hours

54%
In-class polls

53%
Blogs

53%
Flipped classes

44%
Educational games

36%
Mandatory advisor sessions

17%
Other

Electronic newsletters	52%
Developing targeted Facebook pages	46%
Webcasts of events (e.g. sporting events, lectures)	39%
Live online Q&A sessions	36%
Mixed media forums (e.g. Google Hangouts)	32%
Frequent surveys/polls	31%
Organizing off-campus activities	21%
Utilizing Wikis	21%

HOW DO YOU FOSTER A SENSE OF CONNECTION AND COMMUNITY ACROSS THE STUDENT POPULATION?

Responders use a wide variety of tools to foster connection and community in their student population, led by newsletters (52%), targeted Facebook pages (46%), and webcasts (39%).

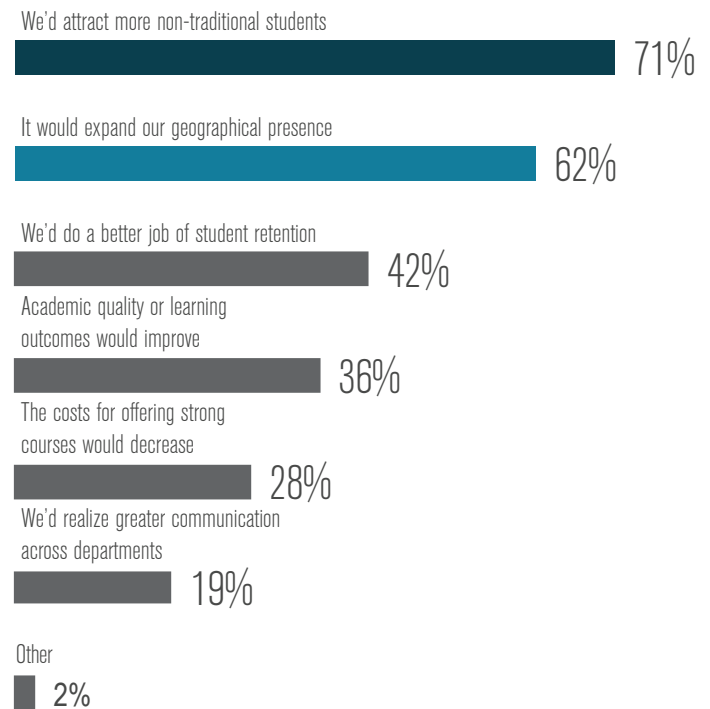## HOW IMPORTANT ARE STRONG ONLINE PROGRAMS TO ATTRACTING/RETAINING STUDENTS?

(Rate on a scale of 1-5, 1 = not very important, 5 = critically important)

6%   12%   14%   30%   34%

UNIMPORTANT   CRITICAL

Survey responders see strong online programs as absolutely central to attracting and retaining students.

WHAT WOULD BE THE PRIMARY ADVANTAGE TO YOUR COLLEGE HAVING MORE ROBUST ONLINE OFFERINGS (BOTH COURSES AND PROGRAMS FOR STUDENTS, LIKE FINANCIAL AID LINKAGE)?

"ATTRACTING NON-TRADITIONAL STUDENTS" and "expanding geographical presence" are the top cited advantages of increasing robustness of online programs.

We'd attract more non-traditional students	71%
It would expand our geographical presence	62%
We'd do a better job of student retention	42%
Academic quality or learning outcomes would improve	36%
The costs for offering strong courses would decrease	28%
We'd realize greater communication across departments	19%
Other	2%