Impact of Distance Education on Adult Learning (IDEAL) Project

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RESEARCH METHODOLOGY

Introduction

The IDEAL project is a joint project of the International Council for Open and Distance Education (ICDE), the UNESCO Institute for Lifelong Learning (UIL), and StudyPortals (SP). It runs from October 2013 to September 2015 with financial support from the EU Lifelong Learning Programme (sub-programme Erasmus Multilateral Projects).

Purpose of the project and research questions

The IDEAL project has been designed to get a better understanding of distance education offered by higher education institutions and to examine how higher education institutions can contribute to adult learning by way of distance education.

The project aims to:

- offer insights on the needs of adult learners to both policy makers and distance education providers;
- strengthen the social dimension of higher education by better meeting the needs of adult learners;
- increase the participation of adult learners in higher education through distance education.

The central research question of the project is: **How can the distance education offer of European higher education institutions be better matched to the needs of adult learners?**

To address the central research question, a number of sub-questions have been formulated:

1. What is offered?
2. What are students looking for?
3. What are the intended target groups?
4. What is the current student body?
5. Who is showing interest in distance education?
6. What are the motivations of students to consider distance education?
7. What are the main barriers to access?
8. What kind of support do adult learners (expect to) get during their studies?
Core concepts / definitions

Before setting out to address the research questions, it is important to clearly define the concepts used and thus to clearly delineate the scope of the project. Looking at the central research question, three terms require such clarification: distance education offer, European higher education institutions, and adult learners.

The UNESCO Institute for Statistics defines adult education as

“Education specifically targeted at individuals who are regarded as adults by their society to improve their technical or professional qualifications, further develop their abilities, enrich their knowledge with the purpose to complete a level of formal education, or to acquire, refresh or update their knowledge, skills and competencies in a particular field. This also includes what may be referred to as ‘continuing education’, ‘recurrent education’ or ‘second chance education’. “ (UNESCO 2012)

In the case of higher education this definition makes it difficult, though, to distinguish between those still in the process of completing initial education and those returning to education at a later stage. As the IDEAL project focuses on the latter, it will use the definition provided by the European Centre for the Development of Vocational Training (Cedefop) in its “Terminology of European education and training policy”, which restricts adult learning to learning undertaken by adults after they have left their initial education and training.

Initial education and training in turn is defined as “[g]eneral or vocational education and training carried out in the initial education system, usually before entering working life” (Cedefop 2008). This definition is similar to the more detailed one given by the UNESCO Institute of Statistics, which defines initial education as: “[f]ormal education of individuals before their first entrance to the labour market, i.e. when they will normally be in full-time education. It thus targets individuals who are regarded as children, youth and young adults by their society. It typically takes place in educational institutions in a system designed as a continuous educational pathway.” (UNESCO 2012)

The key point to note here is that the IDEAL project focuses on education offered to adults after they have left their initial education and training. The IDEAL project therefore uses the Cedefop terminology, which defines adult education as:

“General or vocational education provided for adults after initial education and training for professional and/or personal purposes, and which aims to:

- provide general education for adults in topics of particular interest to them (e. g. in open universities);
- provide compensatory learning in basic skills which individuals may not have acquired earlier in their initial education or training (such as literacy, numeracy) and thus to;
- give access to qualifications not gained, for various reasons, in the initial education and training system;
- acquire, improve or update knowledge, skills or competences in a specific field: this is continuing education and training” (Cedefop 2008).
That means that the adult learners targeted by the IDEAL project are adults returning to education after a period of work, unemployment, parental leave etc. While EU studies (e.g. the Adult Education Survey) or targets (e.g. the 15% benchmark on adult participation in lifelong learning by 2020) often concentrate on those aged 25-64, the IDEAL project takes a more inclusive approach and includes all learners who have completed their initial education and training and are returning to education (or at least considering it), no matter what age they have.

As far as the type of education is concerned, the IDEAL project covers higher education only, and more specifically distance education offered by European higher education institutions. Only higher education institutions that are on IAU’s List of Universities of the World (http://www.iau-aiu.net/content/list-heis) and that are based within the European Higher Education Area will be considered. That does not mean that all 47 countries of the European Higher Education Area will be covered but higher education institutions that meet those criteria will have the possibility and will be encouraged to participate.

Distance education has a long tradition and has traditionally been separated from campus-based education. In the initial proposal the IDEAL project referred to the definition used by UNESCO (2002):

“The terms open learning and distance education represent approaches that focus on opening access to education and training provision, freeing learners from the constraints of time and place, and offering flexible learning opportunities to individuals and groups of learners.” (UNESCO 2002)

Such a degree of openness and flexibility will not be offered by many higher education institutions, though — most likely only by Open Universities that focus exclusively on distance education (single mode institutions). The IDEAL project, however, seeks to include also so-called dual mode institutions, offering both campus-based and distance education, that are likely to provide a more limited degree of openness and flexibility, applying a large variety of different interpretations of open and distance education.

The IDEAL project will therefore consider distance education as generic term for different organisational forms of education in which students and teachers are separated in time and space. It includes both online education (≥ 80% of the content delivered online) and blended education (30-79% of the content delivered online) as well as modes of education using printed material delivered by post and/or other tools for bridging the distance.

In recent years the boundaries between distance education and campus-based education have become increasingly blurred, resulting in a mixed form of education often referred to as flexible education or blended education.

The terms “flexible education” and “blended education” are often used interchangeably. For the purpose of the IDEAL project, the use of the first follows the concept developed by the Swedish Agency for Distance Education (DISTUM) (see below).
“Blended education” describes a course unit or programme that blends online and face-to-face delivery. For the IDEAL project, a course or programme is considered as “blended education” if a substantial proportion (30-79%) of the content is delivered online.

For flexible education, DISTUM identified a number of core characteristics:

“Flexible education makes it possible for students to select place, time, tempo and way of studying. The education providers plan, organise, realise teaching with the purpose to support students’ communication and learning. Thus from a student’s perspective flexible education could be characterised as possibilities to

- study and follow teaching from home or from another place separated from the education provider
- begin studies and take part in teaching at self selected time
- perform studies in self selected tempo
- study together with other students or as a single student

The education provider should make these studies possible through

- developing and adapting teaching material
- developing and adapting material supportive to the students’ work
- developing and adapting ways for assessment of students’ knowledge
- using ICT to bridge distance in time and space
- being available during students’ work to
  - guide studies
  - support students’ work and communication
  - give an administrative framework for the studies.” (Distum 2000)

The IDEAL project will draw upon this concept to analyse the degree of flexibility of the distance education offered by different higher education institutions. The project will include distance education of any length (ranging from individual course units to full degree programmes) that can be enjoyed by any free moving student. There might be entry requirements (e.g. work experience or language skills) but once they are met, any student should be free to follow the courses or programmes (i.e. they are not connected to specific exchange programmes).

Existing research
The IDEAL project will build upon and complement existing research on both adult education and distance education. During the last 50 years both fields have been researched extensively, also the crossroads between adult learners and the organisation of studies at a distance. This short paper aiming at introducing the methodology of the three IDEAL studies cannot give a fair overview of that research. The rapid growth of the educational arena (massification of education) and the developments of organisational forms and technologies for education are changing the prerequisites both for the praxis fields and these two fields of research. However we will return to this when analysing the data from the three studies.
The same goes for a number of large-scale, often more policy-oriented surveys carried out at European / international level.

The Adult Education Survey (AES) is a household survey that forms part of the EU Statistics on lifelong learning. People aged 25 to 64 living in private households are interviewed on their participation in education and training activities (formal, non-formal and informal learning). After a pilot exercise between 2005 and 2008, the Adult Education Survey was run for the first time in 2011-2012.

The Labour Force Survey (LFS) is a large household sample survey on labour participation of people aged 15 and over as well as on persons outside the labour force, which also includes questions on education and training. The survey targets people aged 15 years and over living in private households. It is carried out in the 28 Member States of the European Union, 2 candidate countries and 3 countries of the European Free Trade Association (EFTA) by the national statistical offices in accordance with a common coding scheme. The results are processed by Eurostat.

Drawing on the Adult Education Survey, the Labour Force Survey as well as information collected by the Eurydice Network, Eurydice published in 2011 a report on Adults in Formal Education, which also provides valuable insights (Eurydice 2011).

In autumn 2013, the European University Association (EUA) carried out a survey on e-learning among its members and other higher education institutions across Europe to map their e-learning capacities and their perceptions of e-learning and the related changes. Additionally, the survey covered the topic of Massive Open Online Courses (MOOCs) to find out more about their development in Europe. Once the results of the EUA survey are available, they will be fed into the IDEAL project.

The IDEAL project also seeks to create synergies with UIL’s work on adult education, most notably the Global Report on Adult Learning and Education (GRALE)1 produced every three years, especially with regard to the question of access barriers of adult learners addressed by the first GRALE report.

**Added-value of the IDEAL project**

The IDEAL project is unique in its focus on the interrelations of adult participation, higher education and distance education. It also aims to provide new and unique data through access to the DistanceLearningPortal and the large networks of ICDE, UIL and the task force members (see below). Whereas current data is usually obtained through grand-scale surveys such as the Labour Force Survey or the Adult Education Survey, IDEAL seeks to investigate the actual content of the distance education offer and the social profile and needs of adult learners. IDEAL thus zooms in on both the offer of higher education institutions as well as the demand from the learners’ side. The aim of this novel approach is to contribute to a better matching of needs and offer, and ultimately to a greater participation of adult learners.

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learners in higher education through distance education. Another added-value of the IDEAL project is its focus on adult learning in an international setting, which could help to gain new insights on virtual mobility of adult learners.

Studies to be conducted

Study 1 will examine the European distance education offer – what is offered and who is it designed for? For this study, the programmes and course units listed on the DistanceLearningPortal will be analysed and a survey will be carried out among distance education providers. Study 2 consists of a survey among enrolled distance education students to analyse their social profile, their motivations, the barriers they encountered etc. Study 3 will focus on prospective distance education students – who are they, what do they look for, what are the barriers? For this purpose, the browsing and search behaviour on the DistanceLearningPortal will be analysed and five experts will be asked to conduct a meta-analysis of existing research for five country cases.

All responses will be held in strict confidence. Only aggregated data will be reported, no individual responses or contact details will be shared with any other organization.

One important limitation of study 1 and 2 is that they will be conducted in English. This means only people who are able to read and write in English will be able to participate, and as many of them will not be native-speakers, the quality of their answers might also be negatively affected. Given the limited resources available, it is not possible to conduct the surveys in more than one language but it is important to be aware of those limitations and to take them into account when analysing the data. Study 3 will allow mitigating the language bias to some extent, as the case studies will also cover research conducted in the local languages of the five selected countries.

Study 1: the offer - distance education at European higher education institutions

The goal of the first study will be to examine the distance education offer of European higher education institutions and to identify the intended target group(s). For this purpose, an online survey will be conducted among higher education institutions (in April 2014) and the distance education offer listed on www.DistanceLearningPortal.eu will be analysed. A short online report presenting the first results is expected to be published in June 2014.

(a) Survey among higher education institutions

Through the networks of ICDE, UIL, SP, and the members of the task force (see below), higher education institutions based in the European Higher Education Area will be asked to participate in an online survey. It is not known how many higher education institutions in Europe actually offer distance education. To be able to cover a variety of countries, types of institutions and forms of distance education, the envisaged response rate has been set to 100. To encourage institutions to participate, the inclusion of up to five programmes in the DistanceLearningPortal will be offered as reward (or an update, if they are already listed). The respondents should ideally come from the strategic policy level of institutions, while also being knowledgeable about distance education. To encourage respondents to complete
the questionnaire, it is important to keep the questionnaire as short as possible. Contacting potential respondents by phone is likely to increase the response rate as well.

The questionnaire will cover the following issues:

- Institutional profile (e.g. single mode / dual mode)
- Number, type and level of programmes / course units offered
- Number of students enrolled
- Support offered to students
- Main motivations to offer distance education
- Main target group(s)
- Perceived barriers to the growth of online education
- Plans for the future

While the questionnaire focuses on questions that can be answered at institutional level, information on the programme level will mainly be collected via the DistanceLearningPortal.

(b) Offer on www.DistanceLearningPortal.eu

By October 2013, the DistanceLearningPortal covered 1727 distance education courses or programmes (offered online or in a blended way), 1097 of which in the UK. The large majority of the courses were master programmes but they also included bachelor and PhD programmes as well as short courses (defined as anything less than three months), such as modules or summer schools. 79% were offered by traditional universities, 21 % by specific distance education institutions. More than 80 % of the programmes were offered in English, which is related to the fact that more than 60 % of the offer was UK-based and the DistanceLearningPortal mainly targets international students. This could be a fundamental access barrier to many adult learners. Study 3 will allow to assess this more closely, as the 5 case studies will also investigate the effect of the language of tuition in distance education on potential students.

Another challenge is that higher education institutions that add a programme to the DistanceLearningPortal often do not complete all fields, so extra efforts will be needed not just to insert new programmes but also to complete (and update) existing entries.

Study 2: the demand – social profile of students enrolled in distance education

The goal of study 2 is to examine the profile and the needs of the actual users, i.e. adult learners enrolled in distance education. Topics to be covered could be:

- the social profile of the students (age, gender, family situation, work situation, prior education etc.);
- if the programme they are enrolled in is in the same or in a different field than their previous education.
- their motivation to pursue distance education: improving career perspectives with horizontal differentiation (getting another degree in a different field, skills training),
employment perspectives with vertical differentiation (getting a higher qualification than the one previously held), self-fulfilment, avoiding unemployment, etc.

- their expectations;
- the barriers they experienced;
- income and funding, e.g. how students fund their studies, how difficult they find it to finance their studies, how much of their annual income they spend on the fee;
- the sort of technology used; how students are learning;
- if they receive any other training or support;

To collect the data, higher education institutions that have participated in survey 1 will be contacted and asked to circulate the invitation to participate in an online survey among their enrolled distance education students. Other ways to reach adult learners studying at a distance will also be explored. To get a good response rate (aim: 1,500) and also valuable responses, the questionnaire will be short (+/- 12 tailor-made questions), formulated in simple English, stating very clearly that the higher education institutions will not see the answers, as otherwise students might be inclined to give polite rather than honest answers. Moreover, several prizes will be offered as incentives. To make sure the respondents do not get annoyed, the questions need to be relevant to them and their answers need to have an impact on the questions that follow. The survey will be conducted in May 2014, after having been tested with a student focus group at the end of April 2014. A short online report presenting the first results will be published in summer 2014.

**Study 3: prospective students**

The third study is the most innovative in that it seeks to reach out to prospective students. The difficulty with adult learners is that they are not a clearly delineated group and not known unless they enrol; they are thus not easy to reach – it is easier to reach those who enter higher education right after leaving secondary education. One thing prospective students have in common, though: if they want to study, they are likely to start with a Google search – if they know how to use it and have access. This limitation will be reflected in the 5 country case examples. A Google search is likely to take them to StudyPortals. Once people visit the StudyPortals website, it is possible to study their browse and search behaviour for the purposes of the IDEAL project.

In the field of distance education (i.e. online or blended programmes) StudyPortals attracts 175,000 visits per month. 48 % coming from Europe, 27 % from Asia, 12 % from Africa, 8 % from North America, 3 % from Latin America, 2 % from Oceania.

For study 3, StudyPortals will set up two technical systems, one to save the browsing and search behaviour and one to analyse the data afterwards.

At the moment very little is known about the visitors of StudyPortals – essentially only where they come from, provided the IP address is correct. Therefore, it will be necessary to ask them a few questions, e.g. how old they are or whether they already have completed initial education and training, have work experience etc.
Obviously not all visitors of the website are prospective students, it could also be someone accidentally visiting the website while actually looking for something else; it could be a professor; it could be a researcher; but compared to the number of students the number of those other visitors can be expected to be very small (within the 3 % margin of error).

Anybody who spends more than 3-4 minutes on the website will receive a pop-up with a short survey of 10-12 questions. One central question will concern the study goal (first study, vertical change, horizontal change); other questions will be made conditional – depending on their answers the respondents will be guided directly to relevant follow-up questions:

- What are the expectations of prospective students? Do they expect to get the same quality as with traditional face-to-face higher education? Are they expecting difficulties compared to face-to-face education?
- Accessibility; how would prospective students like to learn? Mobile?
- When do they intend to study? Within 3 months, 6 months...?

The browsing and search behaviour will then be analysed along the following lines:

- countries looked at
- mode of delivery (blended or fully online)
- language of instruction
- fees ready to pay (or at least to consider)
- disciplines
- degrees / certificates
- length of course(s)
- ...

This kind of data will of course only be used at aggregate level and there will be a disclaimer informing visitors about the protected use of it.

To validate and complement the findings from the DistanceLearningPortal, five experts will be asked to take a closer look at five countries, analysing existing research on potential distance education students, their profiles, needs etc. This is to compensate for potential representativeness issues (use of the DistanceEducationPortal may be influenced by age, familiarity with the medium, physical access, language skills etc.) and to shed light on issues that cannot be captured in such a quantitative analysis. The experts need to have an international orientation but also need to be able to speak the language of the respective country. The aim of asking external experts to undertake the country studies is to benefit from additional expertise and to achieve a good geographical spread. Which countries and which experts to choose still needs to be decided.

The timing of the study is planned as follows:

- April 2014: finish tracking system, start tracking;
August 2014: finish big data querying system;
August 2014: 5 country experts finish meta-research;
October 2014: publication of short online report.

Quality assurance
To assure validity, to enhance the quality of the project, and to facilitate dissemination, a task force has been set up with external experts on adult education and distance education. They have been asked to

- provide feedback on the research methodology and the design of the studies (at a meeting in Hamburg on 31 October 2013 and electronically afterwards);
- identify possible participants for studies 1 and 2;
- comment on the short online reports;
- contribute to data analysis, final report and dissemination (at a second meeting in December 2014 and electronically afterwards).

The task force is composed as follows:

- European Association of Distance Teaching Universities (EADTU)
  George Ubachs, Managing Director of EADTU
- European Association for the Education of Adults (EAEA)
  Susana Oliveira, Member of the EAEA Executive Board
- European Distance and E-Learning Network (EDEN)
  Diana Andone, Director of E-learning Center, “Politehnica” University of Timisoara
- European Foundation for Quality in E-Learning (EFQUEL)
  Ingeborg Bø, Member of the Board of Directors of EFQUEL
- European Society for Research on the Education of Adults (ESREA)
  Sofia Nyström, ESREA Secretariat

Moreover, for the purpose of quality assurance, monitoring indicators will be developed and an external expert will be asked to provide a midterm as well as a final evaluation of the project.

References

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