Impact of Distance Education on Adult Learning (IDEAL) Project

Project number: 539668-LLP-1-2013-1-NO-ERASMUS-ESIN

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 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.

In the Belém Framework for Action[1], adult education is defined as "the entire body of ongoing learning processes, formal or otherwise, whereby people regarded as adults by the society to which they belong develop their abilities, enrich their knowledge, and improve their technical or professional qualifications or turn them in a new direction to meet their own needs and those of their society" (Confintea VI 2009)

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, these definitions 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:

---

[1] The Belém Framework for Action was adopted at the closing of the Sixth International Conference on Adult Education (CONFINTEA VI) in December 2009 in Belém, Brazil. CONFINTEA VI continued a series of global UNESCO meetings on adult education and learning which have been held every twelve years since 1949. Building on the *Hamburg Declaration on Adult Learning* and the *Agenda for the Future* of 1997, the *Belém Framework for Action* records the commitments of Member States and presents a strategic guide for the global development of adult literacy and adult education within the perspective of lifelong learning.

- 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 level 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 either included in the World Higher Education Database (WHED[2]) published by the International Association of Universities (IAU[3]) or that are accredited by their competent national authorities as offering ISCED level 5a/b or above will be considered. Furthermore, only higher education institutions that are based within one of the 47 countries of the European Higher Education Area will be included and encouraged to participate[4].

Distance education has a long tradition and has classically been separated from campus-based education. According to 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 – and 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 therefore considers distance education as generic term for different organisational forms of education in which students and teachers are separated in time and space. It includes 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.

---

[2] World Higher Education Database: http://www.whed-online.com
[3] International Association of Universsties: http://www.iau-aiu.net
[4] List of countries participating in the European Higher Education Area: http://www.ehea.info/members.aspx

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. "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; the use of the term "flexible education" follows the concept developed by the Swedish Agency for Distance Education (DISTUM) (see below).

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 draws upon this concept to analyse the degree of flexibility of the distance education offered by different higher education institutions. The project includes 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.

In 2011, the European Commission, DG Education and Culture, launched the study 'Opening Higher Education to Adults' (HEAD) "with the aim to improve and to extend the available knowledge on flexible learning provision for adults in higher education, which have been identified as crucial to widening adult participation in higher education. The results of the study (published in 2013) should help the European Commission to plan future cooperation activities on adult learning policy related to opening up higher education to adults" (European Commission 2013).

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) produced every three years, especially with regard to the question of access barriers of adult learners and participation patterns.

A new research approach

The IDEAL project examines adult education and its interrelations with higher education and distance education. It aims to provide new and unique data through access to the DistanceLearningPortal, a recently launched pan-European database on distance education

programmes offered by European higher education institutions, and with the help of the large networks of the project partners and the IDEAL advisory board (see p.10). Whereas current data is usually obtained through grand-scale surveys such as the above mentioned 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 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.

There will be three independent, yet complementary studies carried out: **Study 1** will examine the European distance education offer – what is offered and whom 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 adult learners enrolled in distance education 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 is 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 (part a) has been conducted among higher education institutions in April and May 2014. In parallel to the data analysis of this institutional survey, the distance education offer listed on www.DistanceLearningPortal.eu is being analysed (part b). A short online report presenting the first results is expected to be published in July 2014.

Part a) Survey among higher education institutions

With the support of the International Association of Universities (IAU) and its World Higher Education Database (WHED) as well as through the joint networks of the project partners (the International Council for Open and Distance Education (ICDE), the UNESCO Institute for Lifelong Learning (UIL) and StudyPortals) some 4,000 higher education institutions based in the European Higher Education Area have been asked to participate in an online survey in

April-May 2014. The persons addressed were usually the heads of the institutions, i.e. placed at a strategic policy level. 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 has been offered free of charge (or an update, if they are already listed).

The questionnaire covers 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 be collected via the DistanceLearningPortal.

Part b) Offer on www.DistanceLearningPortal.eu

By May 2014, the DistanceLearningPortal covered 3,140 distance education courses and degree programmes (offered online or in a blended way), 1,512 of which in the UK. The large majority of the programmes 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. More than 70% were offered by traditional universities, the others by specific distance education institutions. More than 80 % of the programmes/courses were offered in English, which is related to the fact that almost 50 % of the offer was UK-based and the DistanceLearningPortal attracts predominantly international students. The language of tuition could be a fundamental access barrier to many adult learners. Study 3 will allow assessing this more closely, as the five case studies will also investigate the effect of the language of tuition in distance education on potential students.

The information items available for analysis on the DistanceLearningPortal include the following:
- Basic information about the programme (types of degree, discipline);
- Access (what are the formal entry requirements (prior degree, language proficiency, work experience) and are there alternative entry routes?);
- Organisation of the programme/course (delivery mode (blended or not), time flexibility (start and end date), physical attendance);
- Work load (work load per week, maximum time to complete the course);
- Tuition fees (amount for entire programme, scholarships available?);
- Support offered (Is there any specific support offered, if yes, what kind? E.g.: Learning material developed specifically for distance education; technical support; access to local learning centres/study centres; administrative / organisational support; etc.)

As there have been a number of items which had been left blank for the programmes entered in DistanceLearningPortal and as information on alternative entry routes and on support to students had not been collected at the launch of the database in 2012, some extra efforts have been made within the past months by StudyPortals, the organisation running the DistanceLearningPortal, to collect the missing data for the purpose of analysis.

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 are:
- Personal profile (age, gender, household situation, work and study situation, work experience and previous education, including non-formal education);
- Information on the programme/course selected (field of study, funding situation);
- Motivation to study (in general and for distance education in particular);
- Experiences as a distance education student (work load, barriers encountered and support received, overall assessment).

Study 2 will be launched by the time the institutional survey (1a) is closed, i.e. by the end of May 2014 and after having been tested with a student focus group. To collect the data, higher education institutions that have participated in survey 1 and/or are listed on DistanceLearningPortal will be contacted and asked to circulate the invitation to participate in an online survey among their enrolled distance education students. The survey only targets adult learners as defined above, i.e. after they have left their initial education and training. To get a good response rate (aim: 1,000) and valuable responses, the questionnaire is kept short and formulated in simple English. It will be implemented by the ZEF5 survey tool, which is easy to use and has great potential to engage users into answering all questions. The survey will further state 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. 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. It is also a multi-component study, consisting of an online tracking tool combined with a questionnaire (part a) and five country case studies (part b).

Part a) Online tracking tool and pop-up questionnaire

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 many prospective students have in common, though: if they want to study, they are likely to start with an internet search, e.g. google – if they know how to use it and have technical access (this limitation will be reflected in the next part of this study, i.e. the analysis of the 5 country

---

5 http://www.zef.fi/en/evaluation-engine/

cases). A google search is likely to take them to StudyPortals/DistanceLearningPortal. Once people visit the DistanceLearningPortal website, it is possible to study their browsing and search behaviour for the purposes of the IDEAL project.

In the field of distance education (i.e. online or blended programmes) StudyPortals currently attracts 175,000 visits per month, the majority of which come from European countries. With a clear reference to privacy and data protection, an online tracking tool will be implemented to study the browsing and search behaviour of the website visitors within a given timeframe (planned for June-August 2014). Obviously not all visitors of the website are prospective students, it could also be someone accidently 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).

The browsing and search behaviour will then be analysed along the following lines:
- programmes/courses looked at (fields, countries, higher education institutions);
- mode of delivery (blended or fully online);
- language of instruction;
- fees ready to pay (or at least to consider);
- degrees / certificates;
- length of course(s);

In addition to this, anybody who spends more than 3 minutes on the website will receive a pop-up with a short survey of 10-12 questions. One central question will concern whether and why they are actually considering to pursue distance education.

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

Part b) Five country cases

To mitigate the technical and other biases on the use of DistanceLearningPortal and to complement the analysis of the data gathered in the three studies, five external 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 (the use of the DistanceLearningPortal 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. The International Council for Open and Distance Education will choose the experts according to their expertise.

A short online report on both the results of the online tracking tool and the pop-up questionnaire as well as the five country reports will be published in November 2014.

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

To allow for monitoring of the project, a quality plan for internal and external review will established. 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 as of 10 June 2014

Cedefop (2008), *Terminology of European education and training policy. A selection of 100 key terms*. Luxembourg: Office for Official Publications of the European Communities.

Distum (2000), presented in Holmberg, C. (2001), *Towards a new scenario for Distance Education in Sweden.* Contribution to the 20th World Conference on Open Learning and Distance Education, in Düsseldorf, Germany 1-5. April 2001.

European Commission (2013), prepared by Dollhausen, K. *Developing the Adult Learning Sector.* Brussels*:* Publications Office of the European Union.

European Commission (2012), *New skills and jobs in Europe: Pathways towards full employment.* Luxembourg: Publications Office of the European Union

Eurydice (2011), *Adults in Formal Education: Policies and Practice in Europe*. Brussels: Eurydice.

Gaebel, M. (2014), *Massive Open Online Courses (MOOCs), An Update of EUA's first paper (January 2013),* Brussels: EUA.

UNESCO (2002), *Open and Distance Learning. Trends, Policy and Strategy Considerations.* Paris: UNESCO

UNESCO Institute for Lifelong Learning (2009), *Global Report on Adult Learning and Education*. Hamburg: UIL.

UNESCO Institute for Lifelong Learning (2009), 2nd *Global Report on Adult Learning and Education. Rethinking Literacy.* Hamburg: UIL.

UNESCO Institute for Statistics (2012), *International Standard Classification of Education ISCED 2011*. Montreal: UIS.

Web links

CONFINTEA VI, Bélem Framework for Action:
http://unesdoc.unesco.org/images/0018/001877/187789m.pdf (retrieved in May 2014)

Studyportals, data on DistanceLearningPortal: www.distancelearningportal.eu (retrieved in May 2014)

World Higher Education Database, WHED: http://www.whed-online.com (retrieved in May 2014)

ZEF Survey Tool: http://www.zef.fi/en/evaluation-engine/ (retrieved in May 2014)

18/04/2017