Forbes

4/23/2015 @ 9:46AM

Report That Says Online Learning Growth Is Slowing Misses Big Picture

Michael Horn, Contributor

For 12 years, the Babson Survey Group in partnership with other organizations, including the Online Learning Consortium (formerly the Sloan Consortium), has done critical research into the growth of online learning in American higher education that it publishes in the report Grade Level: Tracking Online Education in the United States. The research has been enormously helpful in understanding the actual numbers of students learning online in accredited institutions and how the institutions themselves—from the administration to faculty—view online learning.

Initially, the research arguably gave a reasonably complete view of the state of online learning in all of higher education, as it showed online learning growing rapidly with growth rates of over 20 percent in 2003, 2005, and 2009. But as of late, the research has suggested that the growth of online learning is flattening. It was 6.1 percent in the fall of 2012 and, according to the most recent report published in January 2015, 3.7 percent in the fall of 2013. Does this mean that online learning is not the disruptive innovation it was heralded to be?

I don't think it does. As Clayton Christensen is fond of saying, God didn't create data; humans create data to try to capture the complexity of the world around them. By its nature, data is backward looking, and most data is incapable of telling the truth. In this case, I think the flattening growth rate of online learning for credit within accredited institutions misses the bigger picture—although I do think it suggests that the pending disruption may take somewhat longer than many have forecasted in the past.

First, as the most recent report itself says, much of the reduction in the rate of growth is because one segment of higher education—for-profit four-year institutions—recorded the first-ever drop in online enrollments of 8.7 percent. For those watching the battering the for-profit universities have taken in recent years, that shouldn't be a surprise. It's also a somewhat special circumstance. The fact that online learning still grew illustrates that its fundamental appeal—primarily in public four-year institutions and private non-profit four-year institutions, according to the report—remains quite strong. Today's big news that Arizona State University will offer its freshman year online for credit at a price that, at last, positions an online program from a public university as disruptive will only fuel that growth is my guess. Furthermore, according to the report, the proportion of academic leaders who say that online learning is critical to their institution's long-term strategy is at an all-time high of 70.8 percent, and those institutions reporting that it is not a critical part of their long-term strategy has dropped to a new low of 8.6 percent.

But even more significantly, the data is increasingly incomplete. First, the research purposely only counts online learning that is taken in a distance-learning environment. Blended delivery of online learning doesn't count toward the data. The challenge is that *where* online learning occurs is increasingly an anachronistic way of thinking about the world, as its growth pervades how we learn in *all* settings. As Heather Staker and I point out in our new book Blended: Using Disruptive Innovation to Improve Schools, for example, one of the ways online learning has improved in the K–12 setting is by blending in brick-and-mortar elements. What's maybe craziest about this is that one of the more rigorous and cited studies on the efficacy of online learning—an Ithaka study [www.sr.ithaka.org/research-publications/interactive-learning-online-public-universities-evidence-randomized-trials] that looked at the implementation of an exemplary Carnegie Mellon Open Learning Initiative statistics course—likely would not have counted in the survey, as the course was a blended one.

The other challenge is that increasingly, much of the growth of online learning isn't just in accredited higher education institutions, but in unaccredited institutions that are hired to do a similar "job" as that of many accredited higher education institutions—advance adult learners in their career pathways. These organizations don't need accreditation per se though, as they will ultimately develop their reputations from the success of their students with employers, as this research [www.christenseninstitute.org/wp-content/uploads/2014/07/Hire-Education.pdf]] by Michelle R. Weise and Clayton M. Christensen discusses. Udacity's Open Education Alliance with AT&T, Google, and others as well as Coursera's Course Specializations in partnership with companies are just two examples of this. Also left uncounted in the data are the rise of programs like General Assembly and other coding bootcamps, Lynda.com (which LinkedIn recently acquired for a blockbuster sum), and more. In other words, while for a long time counting the growth of online learning in traditionally accredited institutions of higher education may have made sense, that step appears less and less complete—especially as these upstarts will grow over time to compete with certain segments of traditional higher education.

Capturing all that data is no easy matter—and the Babson report doesn't claim to try. But it may also be inaccurate to say that online learning in higher education is flattening when it misses the fact that students are increasingly hiring it to do important jobs in their lives from a variety of institutions, both accredited and unaccredited, that fill the postsecondary space.

From www.forbes.com/sites/michaelhorn/2015/04/23/report-that-says-online-learning-growth-is-slowing-misses-big-picture/
30 April 2015