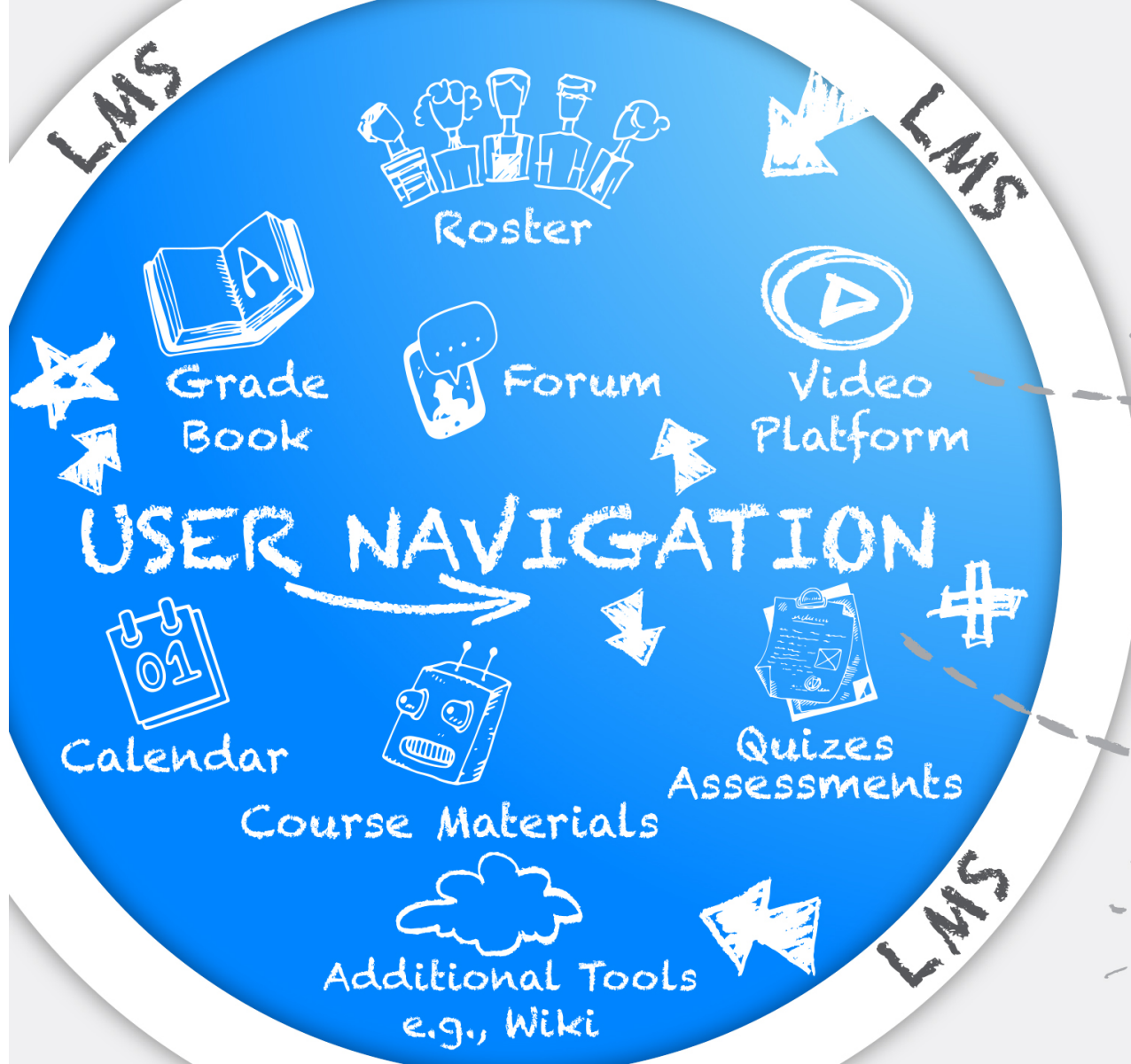# The Future of Learning Platforms
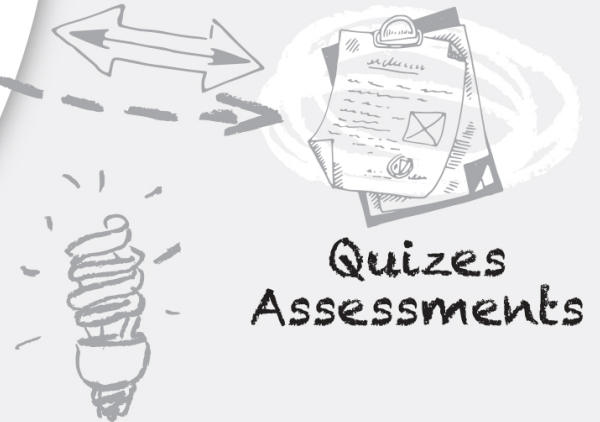
LMS and Video to Share Top Billing

For TeachOnline.CA and ContactNord
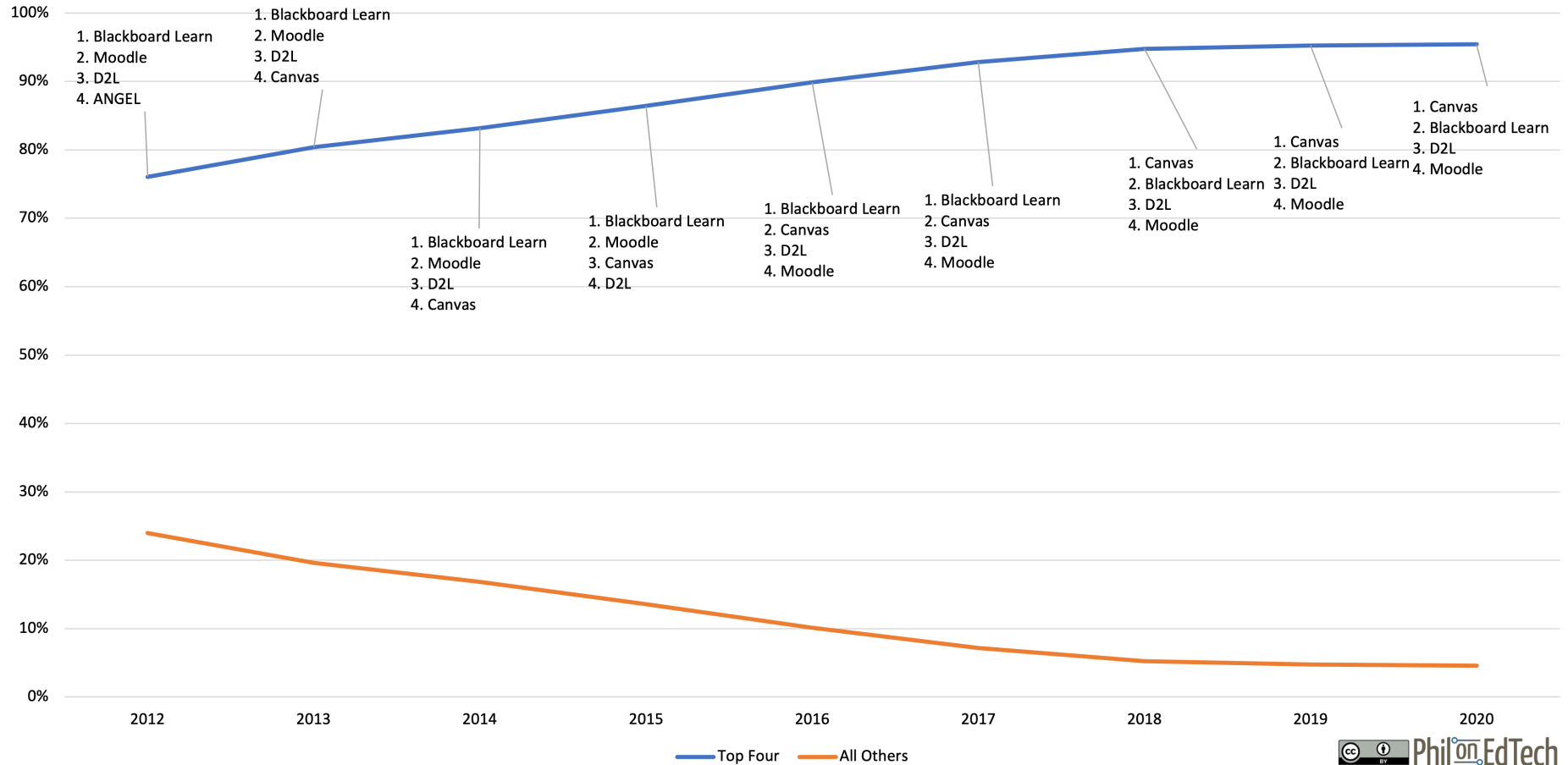May 27, 2021

Phil Hill (@PhilOnEdTech)

Market Share Top Four LMS vs All Others
North American Higher Education by Enrollment

1. Blackboard Learn
2. Moodle
3. D2L
4. ANGEL

1. Blackboard Learn
2. Moodle
3. D2L
4. Canvas

1. Blackboard Learn
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1. Canvas
2. Blackboard Learn
3. D2L
4. Moodle

Top Four   All Others

Phil on EdTech

March 2020 Academic LMS Market Share Per Global Region
All Postsecondary Types
Source: MindWires LMS Market Analysis

Relative Percent of Customers (y-axis)

Time (x-axis)

Innovators, Technology Enthusiasts

Early Adopters, Visionaries

THE CHASM

Early Majority Pragmantists

Late Majority Conservatives

Laggards Skeptics

Customers Want Technology and Performance

Customers Want Solutions and Convenience
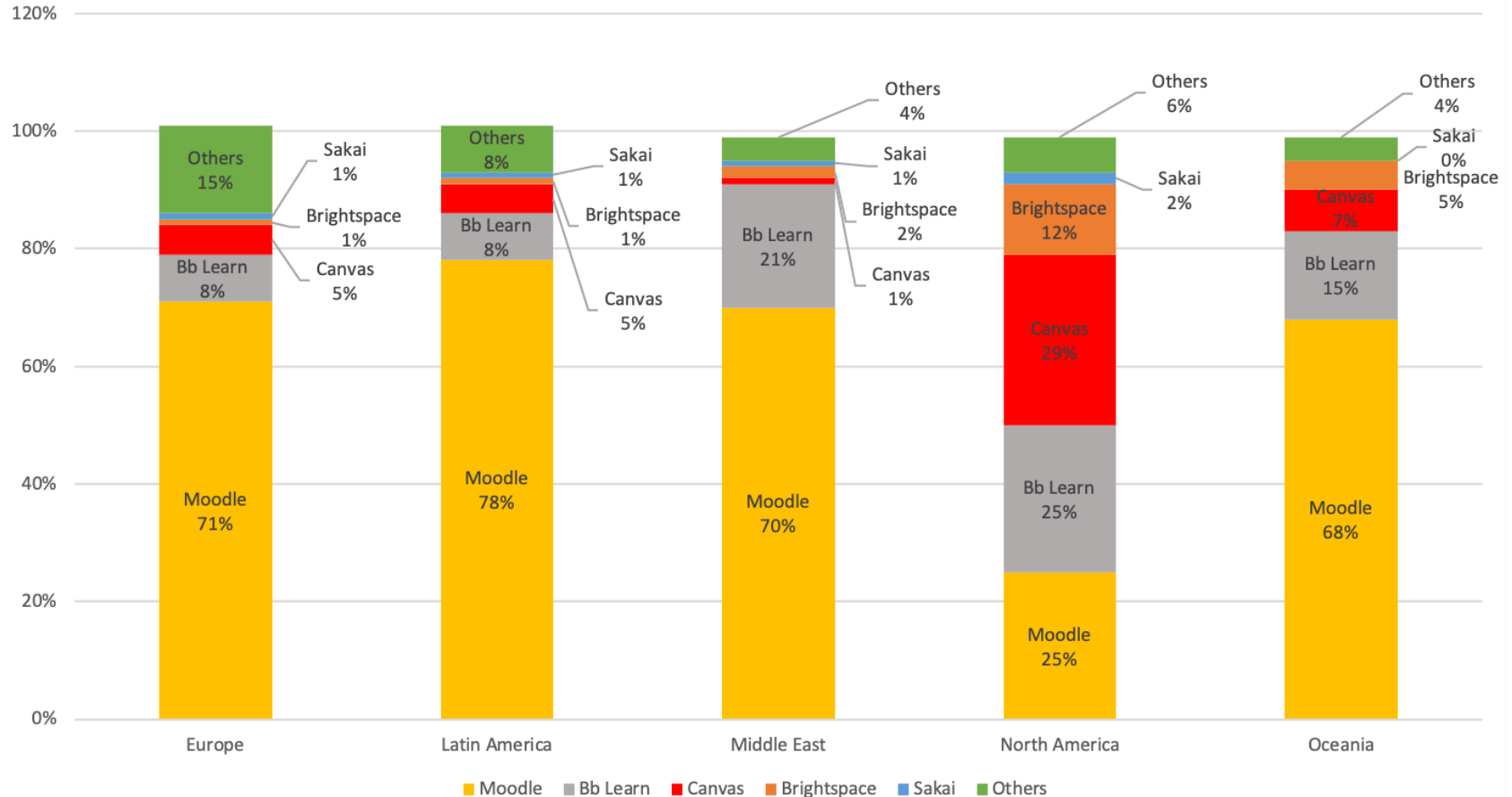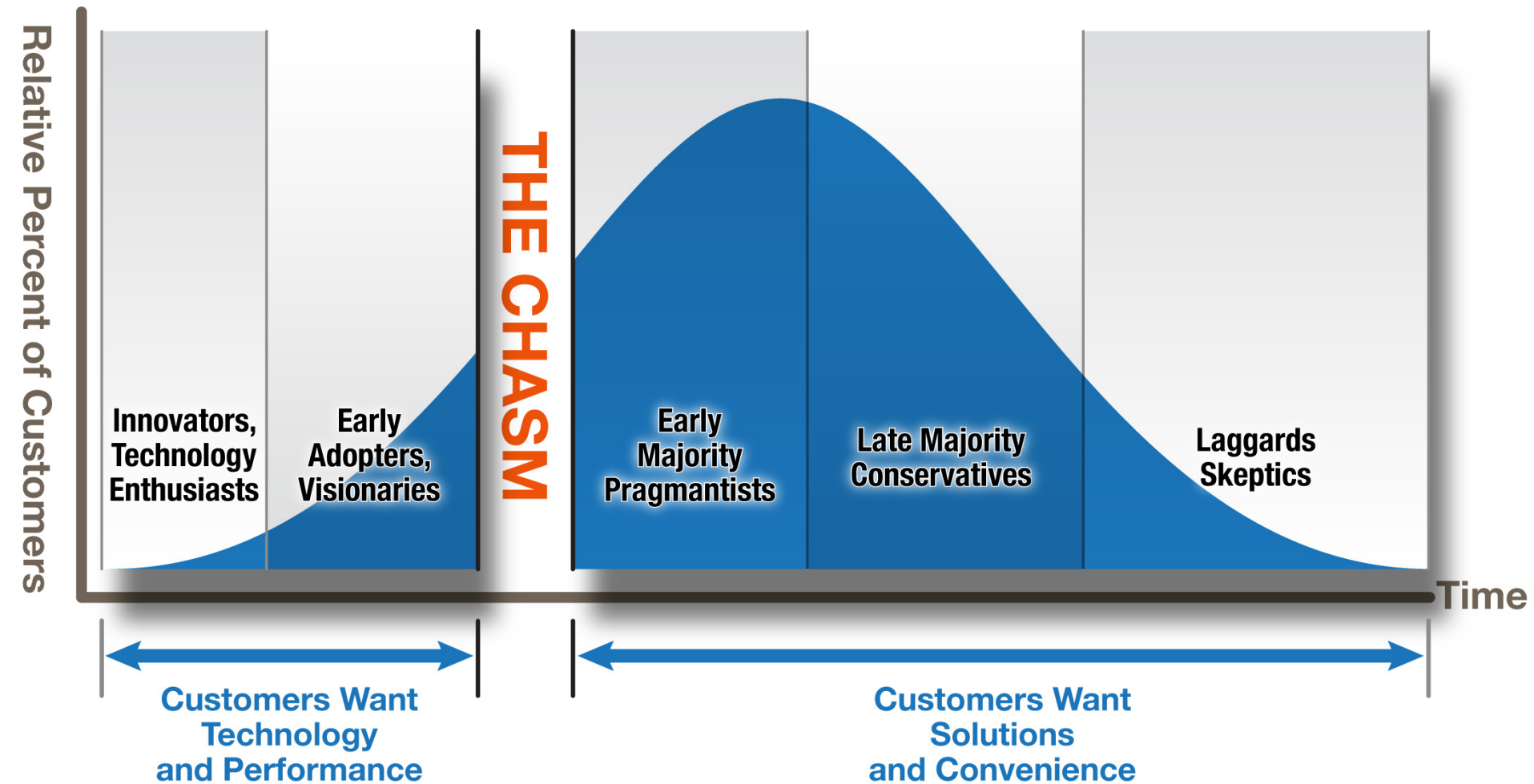
*Based on **Crossing the Chasm** by Geoffrey Moore.*

MindWires

Relative Percent of Customers

Innovators, Technology Enthusiasts

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THE CHASM

Early Majority Pragmantists

Late Majority Conservatives

Laggards Skeptics

Time

Customers Want Technology and Performance

Customers Want Solutions and Convenience

MindWires

% of US Higher Ed Enrollment, Fall 2012 - 2019
of Students Taking At Least One (ALO) Online Course
Source: IPEDS database

No DE Courses

73.9% 72.9% 71.6% 70.1% 68.2% 66.3% 64.7% 62.7%

At Least One DE Course

26.1% 27.1% 28.4% 29.9% 31.8% 33.7% 35.3% 37.3%

% of Total Enrollment

Year

2011 2012 2013 2014 2015 2016 2017 2018 2019 2020
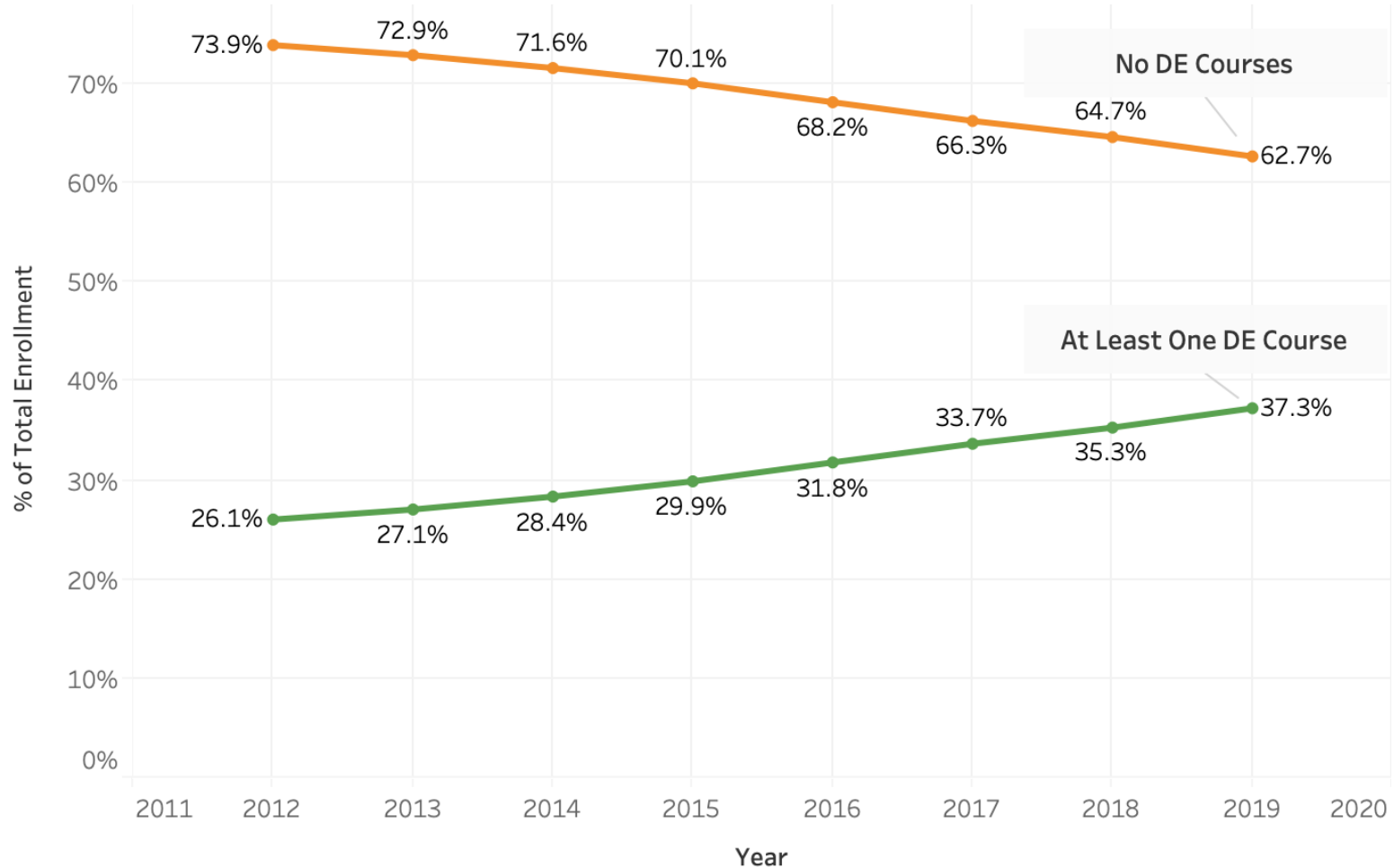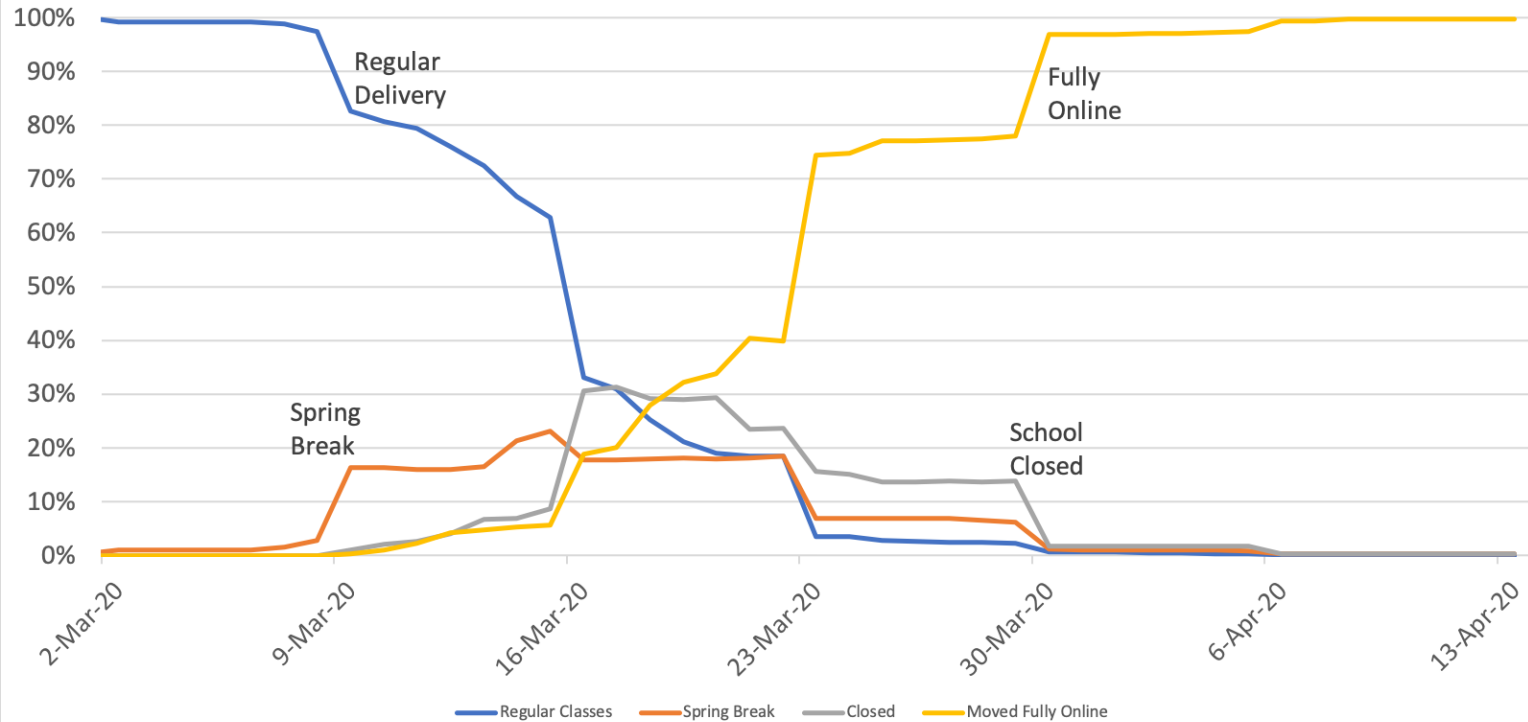
Percentage of US Higher Ed Institutions Moving to Fully Online Delivery
of Traditional Face-to-Face Courses During COVID-19 Crisis
(not including institutions already fully online)

Multiple Phases of Higher Education Response to COVID-19

Online Learning Adoption

Phase 1:
Rapid Transition to Remote Teaching & Learning

North America and many other regions transition to fully-remote teaching and learning in just 3 - 4 weeks, with huge reliance on synchronous video (e.g. Zoom, MS Teams, Google Meet)

Feb - Mar 2020

Phase 2:
(Re) Adding Basics

Institutions must (re) add basics into emergency course transitions: course navigation, equitable access including lack of reliable computer and broadband, support for students with disabilities, academic integrity

Apr - Jul 2020

Phase 3:
Extended Transition During Continued Turmoil

Institutions must be prepared to fully support students for a full term, and be prepared for online delivery - even if starting as face-to-face

Aug 2020 - Spring 2021

Phase 4A:
Re-integration

Difficult transition to add back large % of face-to-face education as pandemic restrictions ease

Institutions must determine which emergency methods to maintain or remove (e.g. HyFlex, video conf), how to deal with student travel restrictions

Spring - Fall 2021

Phase 4B:
Emerging New Normal

Unknown levels of online learning adoption in new normal, but likely higher than pre-2020

Institutions must have new levels of eLearning infrastructure - technology and support - to reliably support students

2022 & Beyond

Outlook as of April 2021

MINDWIRES

Discussion Forum · Assignment Submission · Gradebook · Syllabus · Course Content · Announcements · Email · LMS

MindWires

Social Network

Discussion Forum

Assignment Submission

Blog

Gradebook

LMS-specific Social Network

Syllabus

Course Content

Announcements

Blog

Email

LMS

MindWires

Wiki

Social
Network

Discussion
Forum

Assignment
Submission

Blog

Video

Gradebook

LMS-specific
Social Network

Syllabus

Course
Content

Announcements

Wiki

Collaboration
Tool

Blog

Email

Collaboration
Tool

LMS

MindWires

Wiki

Community
Discussion

Social
Network

Discussion
Forum

Assignment
Submission

Blog

Video

Gradebook

Course
Content

Syllabus

Interoperability Standards
(LTI, Caliper)

Announcements

Email

Data
Roster
Context

Interoperability Standards
(LTI, Caliper)

Collaboration
Tool

Interoperability Standards
(LTI, Caliper)

LMS

MindWires

ENGAGEMENT, ENGAGEMENT, ENGAGEMENT
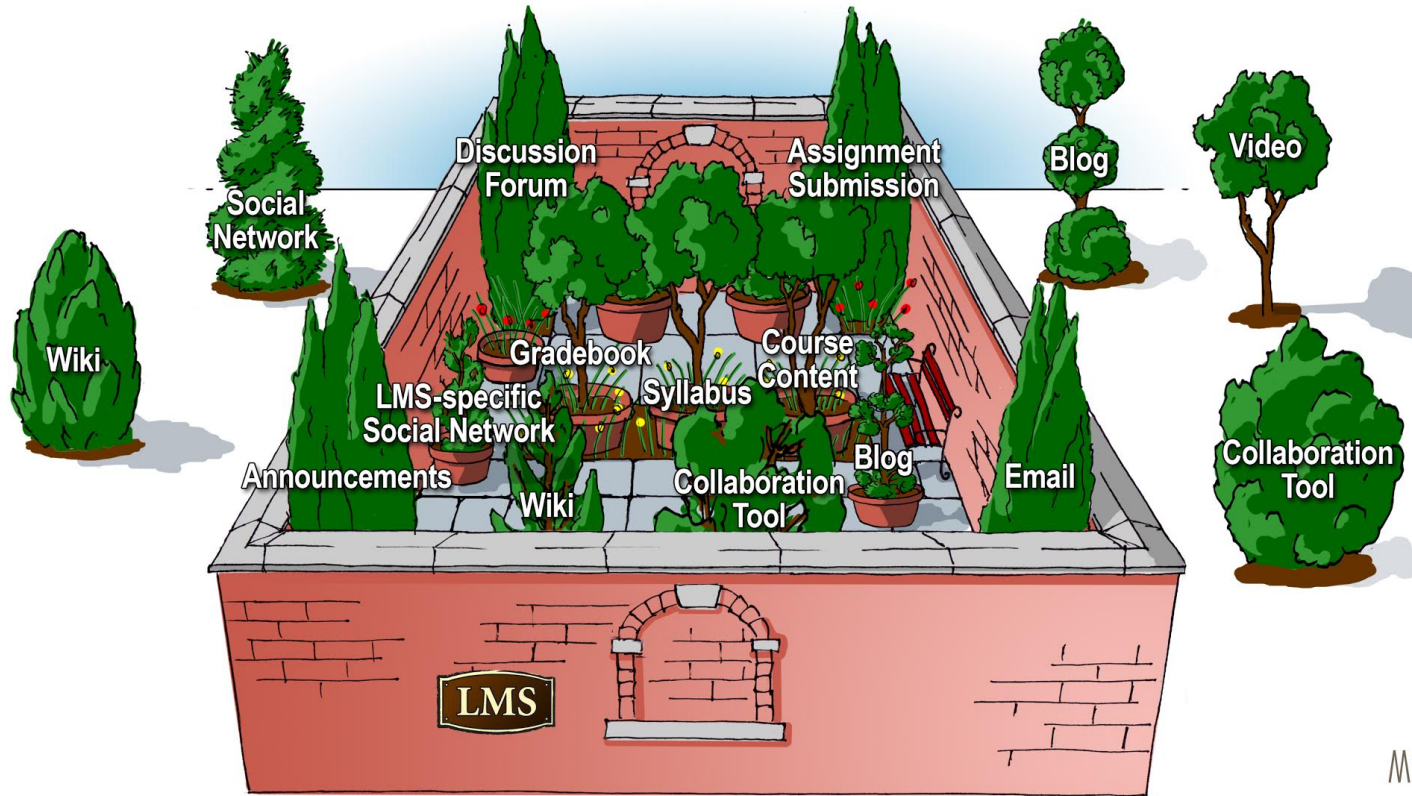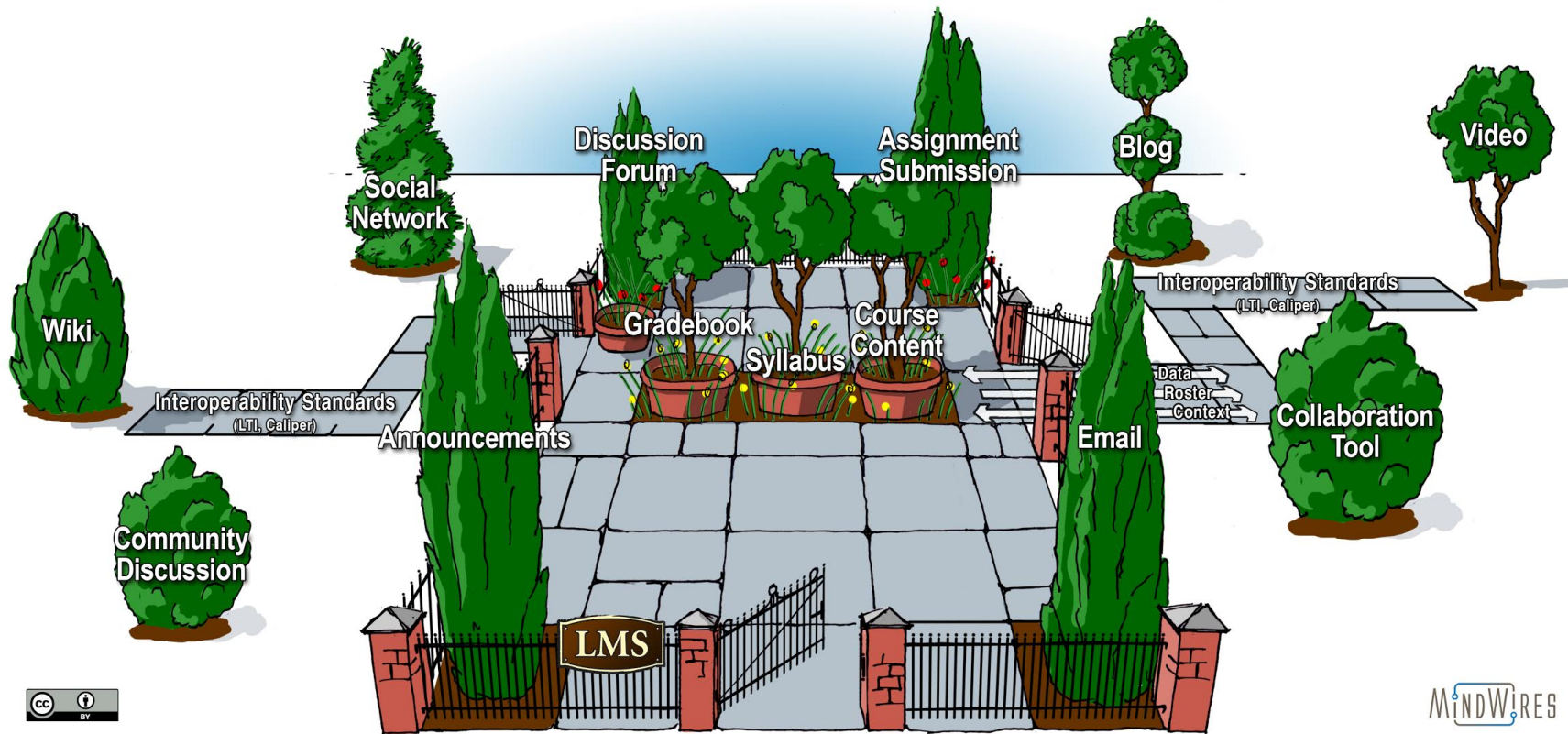
Students are missing out on classroom engagement.

Engagement plays a major role in ensuring students feel like they are deriving value from their education.

78% say the online class experience is unengaging

Spending time with faculty and fellow students is important to them as well.

75% miss face-to-face interaction with faculty and students

Of these students:

- **53%** are spending less time on coursework
- **39%** don't enjoy or see the value in real-time online learning
- **75%** think online instruction is worse than in-person instruction

Of these students:

- **52%** are spending less time on coursework
- **38%** don't enjoy or see the value in real-time online learning
- **76%** think online instruction is worse than in-person instruction

Source: https://tophat.com/blog/adrift-in-a-pandemic-survey-infographic/

FACULTY PRIORITIES FOR THE COMING TERM

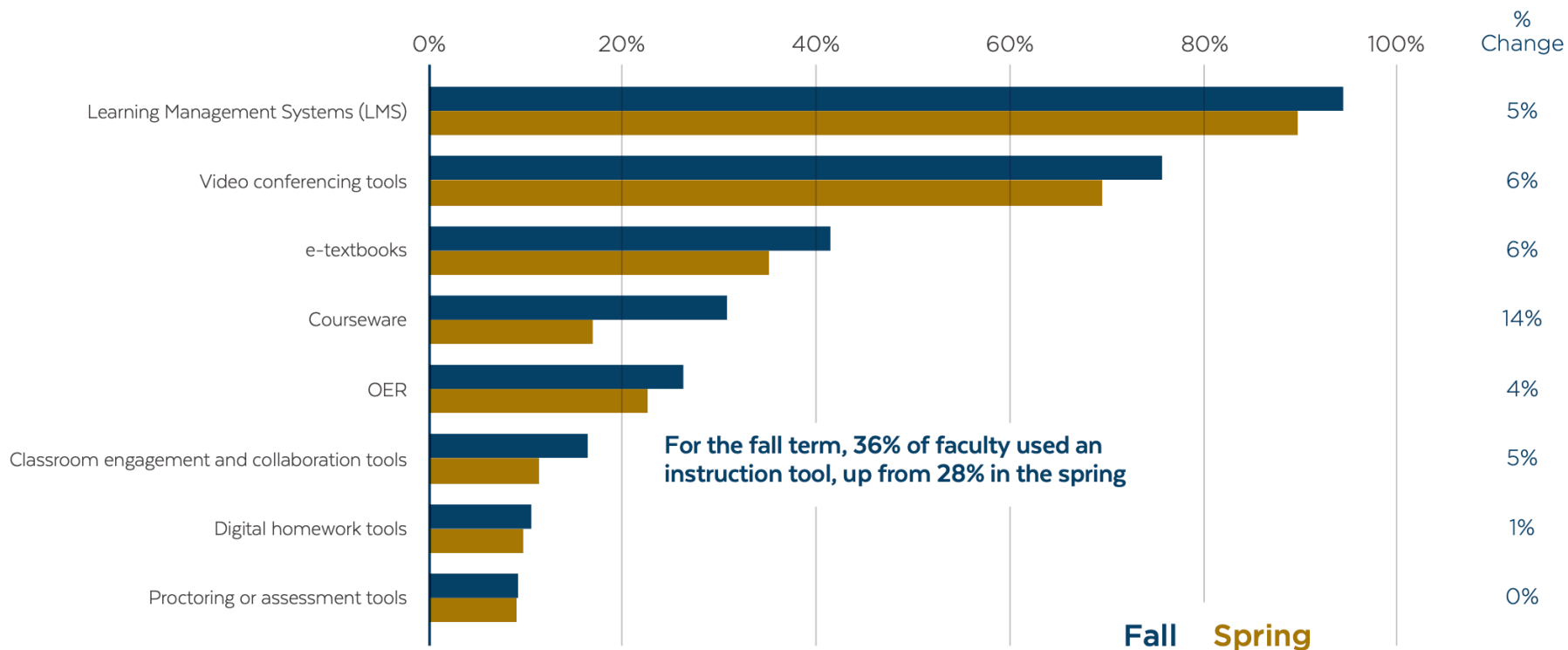|	For Fall 2020 term (May 2020)	For Spring 2021 term (November 2020)	Momentum
Increasing student engagement in class	79%	74%	→
Providing timely feedback for students	38%	38%	→
Increasing student collaboration	33%	36%	→
Efficiently grading materials	29%	36%	↗
Ensuring accessibility for all students	43%	32%	↘
Providing remediation at points of need	30%	29%	→
Reducing achievement gaps among student groups	27%	28%	→
Providing enough practice for students	31%	23%	↘
Assessing student learning accurately and securely	37%	23%	↘

Source: Every Learner Everywhere / Tyton Partners Time For Class Survey Series
https://www.everylearnereverywhere.org/resources/time-for-class-covid-19-edition-part-3/

TOOLS USED DURING THE FALL AND SPRING TERMS

	0%	20%	40%	60%	80%	100%	% Change
Learning Management Systems (LMS)							5%
Video conferencing tools							6%
e-textbooks							6%
Courseware							14%
OER							4%
Classroom engagement and collaboration tools							5%
Digital homework tools							1%
Proctoring or assessment tools							0%

For the fall term, 36% of faculty used an instruction tool, up from 28% in the spring

Fall **Spring**

May survey question: "Which of the following tools or resources did you use in your transition to remote learning? Please select all that apply." N = 852; November survey question: "Which of the following tools or resources did you use in your course this fall? Please select all that apply." N = 837

Source: Every Learner Everywhere / Tyton Partners Time For Class Survey Series
https://www.everylearnereverywhere.org/resources/time-for-class-covid-19-edition-part-3/

PERCENT OF FACULTY USING TOOL FOR THE FIRST TIME DUE TO COVID-19

Tool	Percent
Video conferencing tools	85%
Learning Management Systems (LMS)	14%
e-textbooks	11%
Classroom engagement and collaboration tools	10%
Proctoring or assessment tools	10%
Open Educational Resources (OER)	8%
Courseware (including adaptive courseware)	5%
Digital homework tools	4%

A total of 10% of faculty adopted one or more instructional tool (classroom engagement and collaboration, proctoring or assessment, digital homework).
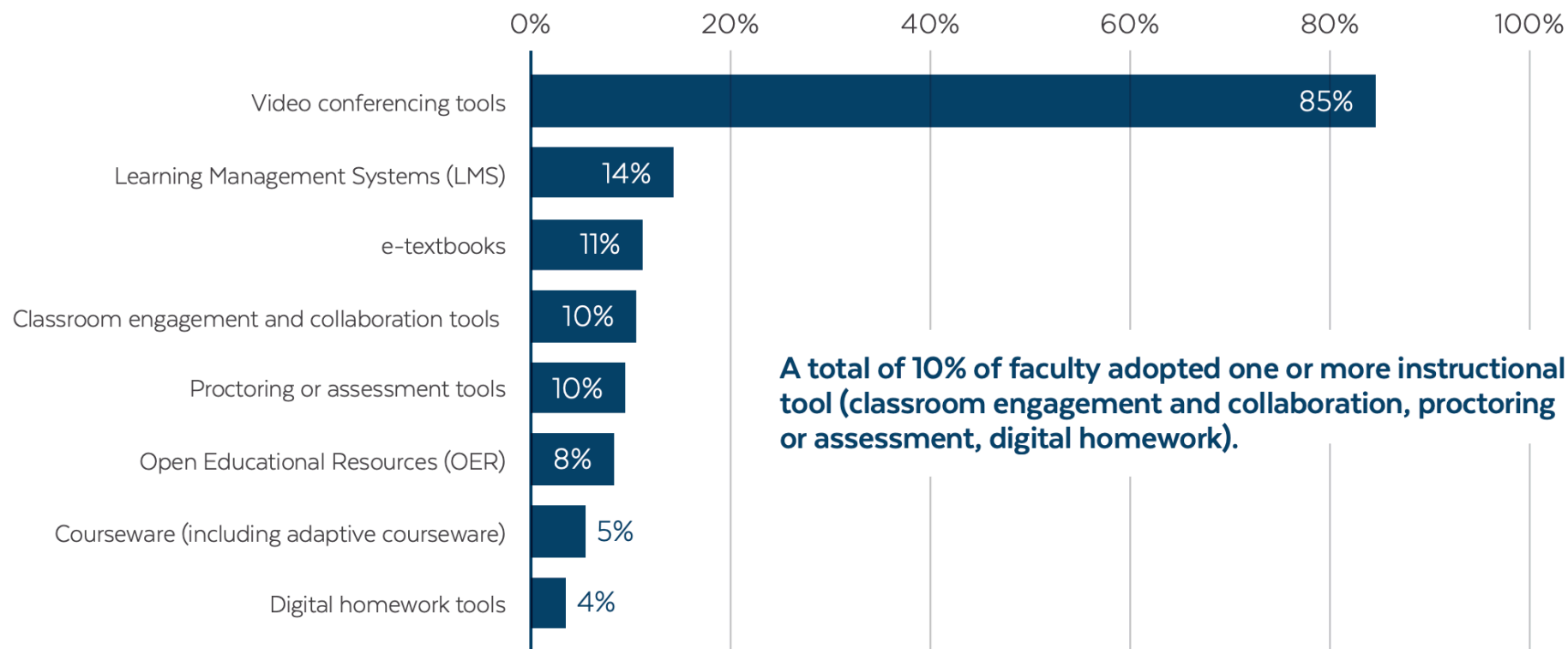
May and November survey question: "Which of the following tools or resources did you use for the first time this term? Please select all that apply." N = 852

Imagine what the pandemic would have done to education just five or seven years ago, before Zoom & Teams & Pre-dominant LMS-in-cloud deployments

	Still Sleeping	Doing Last Night's Homework
Only Showing Video Every 5 Minutes	Watching Netflix	The Only One Answering Me
Distracted by Kids	Video off but Unmuted So I can Hear Him Breathe	Still Sleeping

Source: Penn State
https://sites.psu.edu/learningcorona/2020/03/30/adventures-in-online-zoom-teaching-5/

Video Conferencing: It's real

# of Active Video Conferencing in North American K-12 Market

Product (LMS)
- Adobe Acrobat Connect Pro
- BigBlueButton
- Blackboard Collaborate Ultra
- Collaborate (Blackboard)
- Google Meet
- GoToMeeting
- Microsoft Stream
- Microsoft Teams
- Panopto Screen Recording
- Skype for Business
- VoiceThread
- Webex
- Zoom cloud conferencing
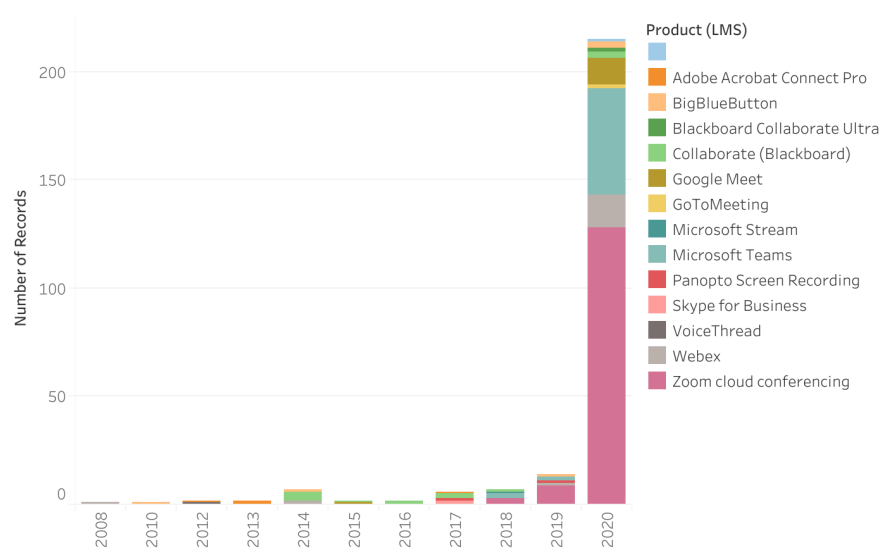
Challenge

- Mistakes

  - See flaws in video classrooms as indication of return to previous status quo

  - Accept video classroom flaws

- Likely Trends

  - Improvements to video classrooms

  - Integration of user experience with LMS

Ed Tech Enthusiasts

Straddling the Chasm

Mainstream

Innovators, (Technology Enthusiasts)

Early Adopters, (Visionaries)

Chasm

Early Majority (Pragmatists)

Late Majority (Conservatives)

Laggards (Skeptics)

MindWires
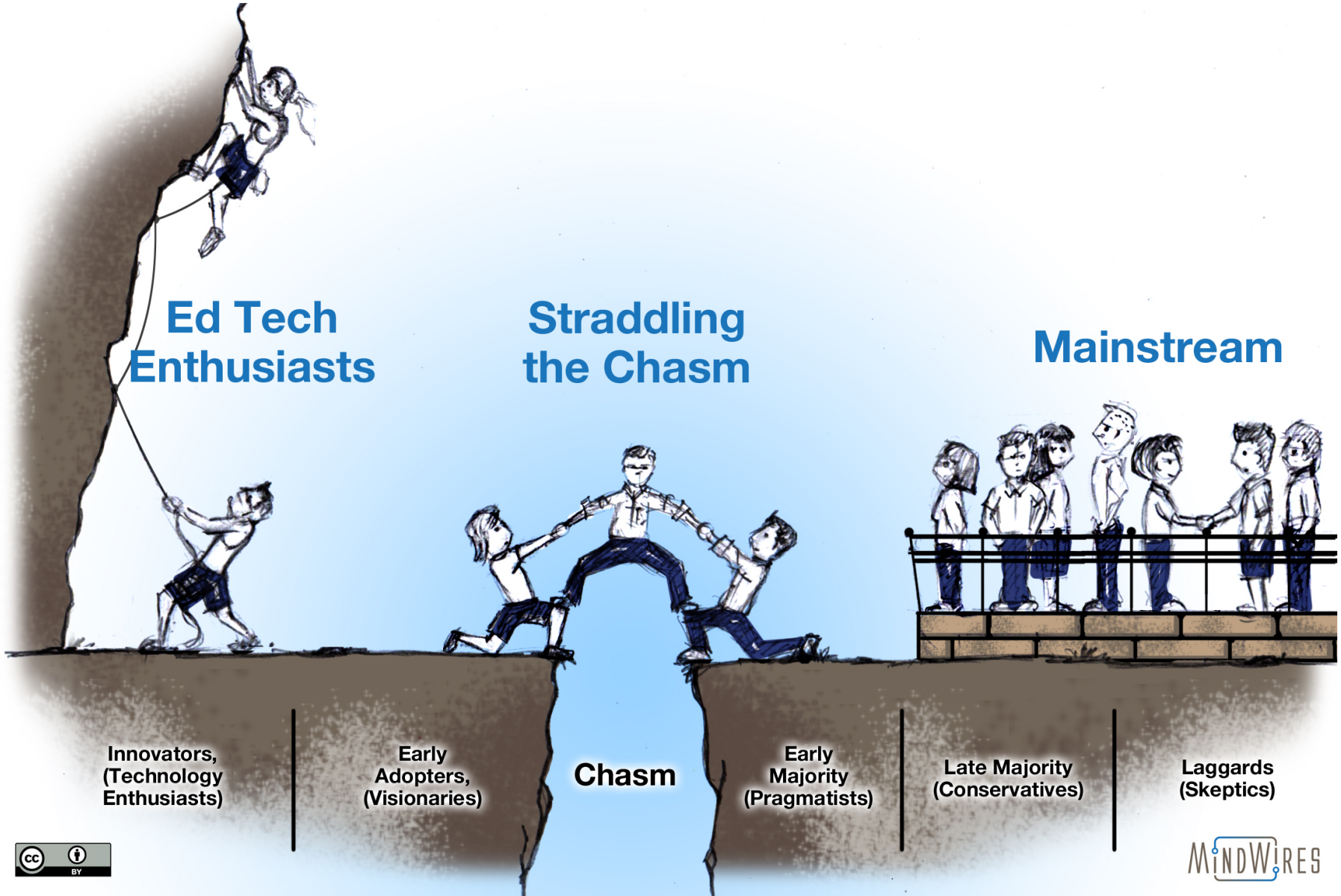
Fall 2020 COVID Transition Planning:
Different Methods to Combine Face-to-Face and Virtual Models

Virtual

Face-to-Face

Fully Online
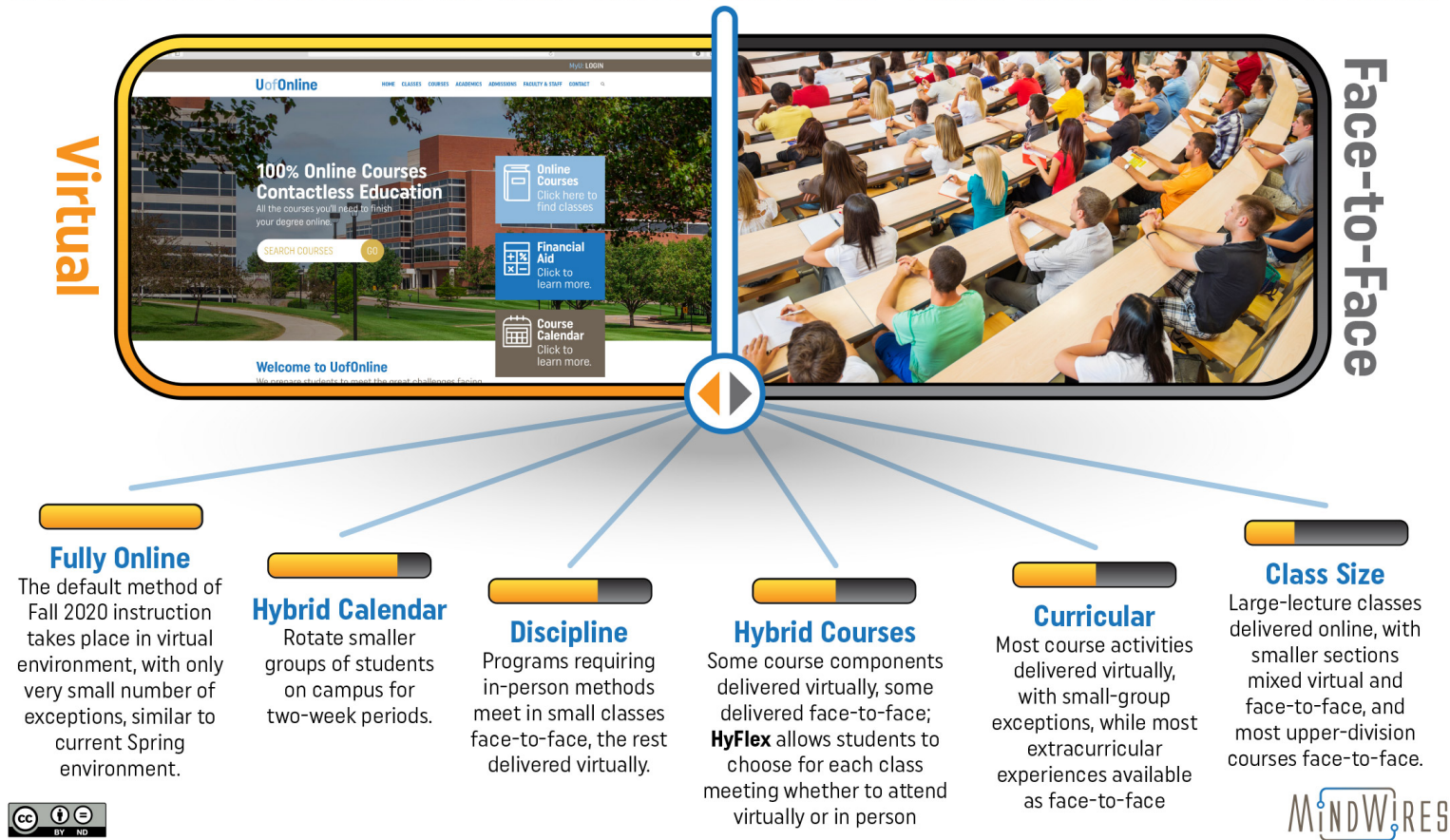The default method of Fall 2020 instruction takes place in virtual environment, with only very small number of exceptions, similar to current Spring environment.

Hybrid Calendar
Rotate smaller groups of students on campus for two-week periods.

Discipline
Programs requiring in-person methods meet in small classes face-to-face, the rest delivered virtually.

Hybrid Courses
Some course components delivered virtually, some delivered face-to-face; **HyFlex** allows students to choose for each class meeting whether to attend virtually or in person

Curricular
Most course activities delivered virtually, with small-group exceptions, while most extracurricular experiences available as face-to-face

Class Size
Large-lecture classes delivered online, with smaller sections mixed virtual and face-to-face, and most upper-division courses face-to-face.

MindWires

Source: https://philonedtech.com/the-covid-fueled-hybridization-of-higher-ed/

Net Effect, design

- Even further increasing the importance:
    - Intuitive learning platform design – pleasing to use, little training required
    - Scalable hosting (i.e., cloud hosting)
- Challenges:
    - Balance simple & intuitive with rich & configurable
    - Afford to stay in business
    - Do better than threaded discussion board

MindWires

We are at an inflection point in education driven by mainstream adoption, different platform designs, moving beyond the digitization of traditional classroom, and (unfortunately) Covid-19.

The key driver of trends in learning platforms is adoption, not technology or pure innovation.

The net effect is leading to increased importance of intuitive design, scalability & reliability, and ability to enable revised academic models.

MindWires

phil@mindwires.com

@PhilOnEdTech
philonedtech.com
mindwires.com

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