

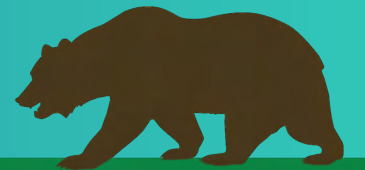
# CRUNCHING THE OER NUMBERS

FRI AUG 5, 9:30 AM

DR. JEFF SEAMAN AND DR. JULIA SEAMAN, BAY VIEW ANALYTICS



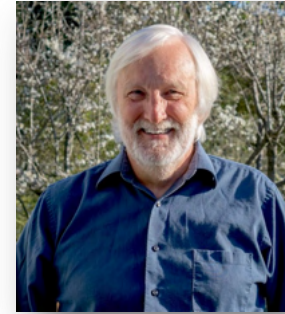
CAL  OER



**August 3-5, 2022**

# INTRODUCTION TO BAY VIEW ANALYTICS

Bay View Analytics, formerly known as the Babson Survey Research Group, offers a comprehensive suite of consulting services in survey design and statistical research. Our services build on nearly two decades of research design, sampling, survey design, and statistical analysis expertise.



Jeff Seaman, Ph.D.  
*Director*



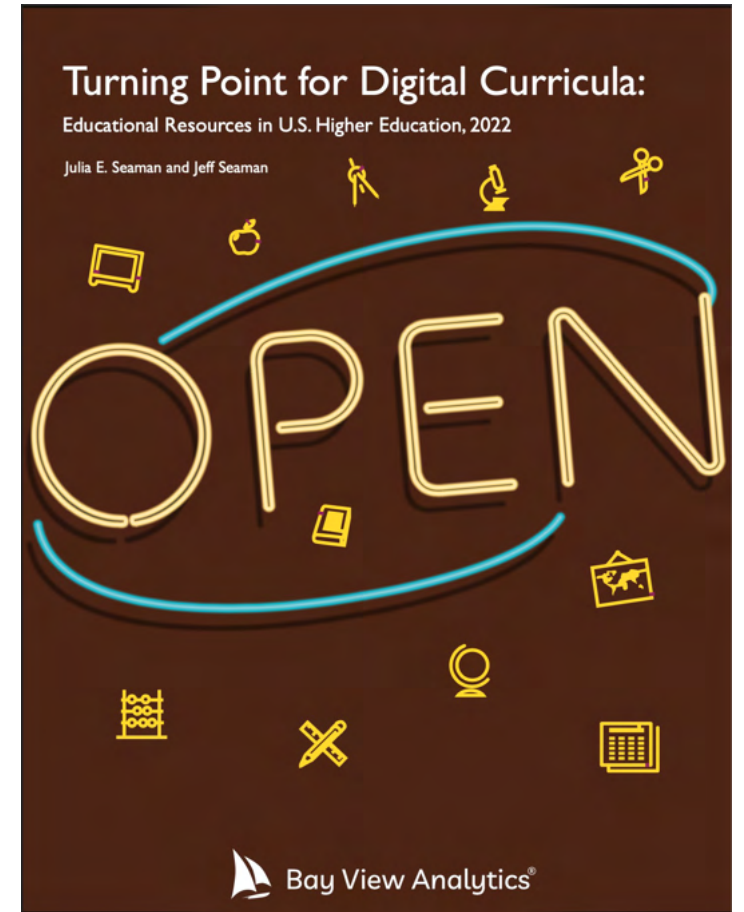
Julia Seaman, Ph.D.  
*Director of Research*



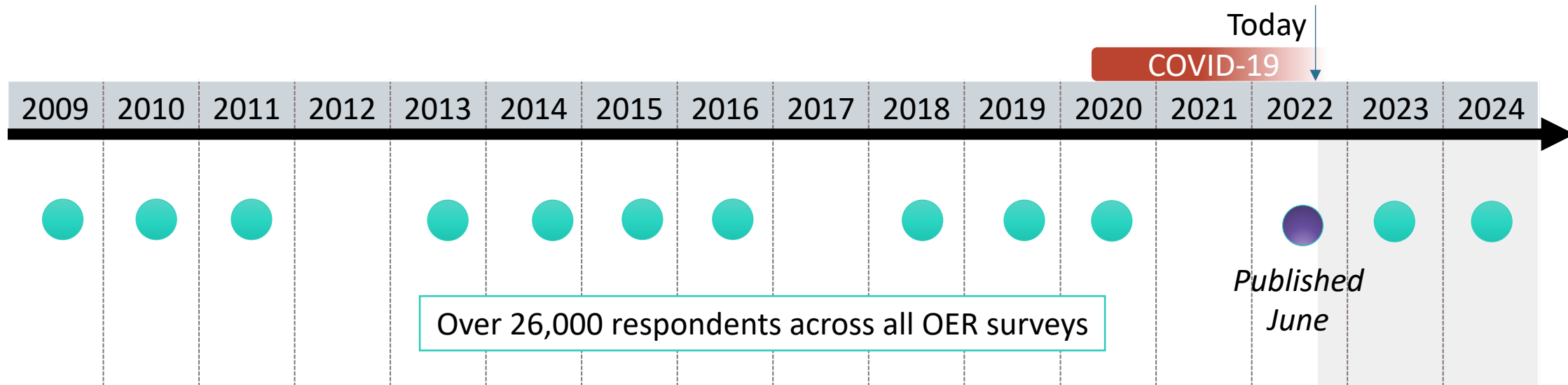
# 2021-2022 HIGHER EDUCATION SURVEY

- Survey conducted April 2022
- 1,843 Faculty
- 916 Administrators
- All 50 states and D.C.
- Included both returning and new questions

Results in this presentation also include responses from an additional 82 faculty from California.



# WE HAVE CONDUCTED HIGHER EDUCATION SURVEYS FOR OVER A DECADE



# SURVEY GOALS AND TARGETED RESPONDENTS

## Goal of Surveys

- To understand the role of OER in Higher Education
- To quantify perceptions and awareness of OER

## Respondents

- Higher Education Administrators, Faculty, and Chief Academic Officers
- Nationally representative for geography and type of institution

Project supported by



Bay View Analytics®

# SURVEY QUESTIONS AND DEFINITIONS

Over our reports, similar questions were asked year over year to allow trends to be examined.

## Definitions used in surveys

**Open Educational Resources (OER):** *OER is defined as "teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and re-purposing by others." Unlike traditionally copyrighted material, these resources are available for "open" use, which means users can edit, modify, customize, and share them.*

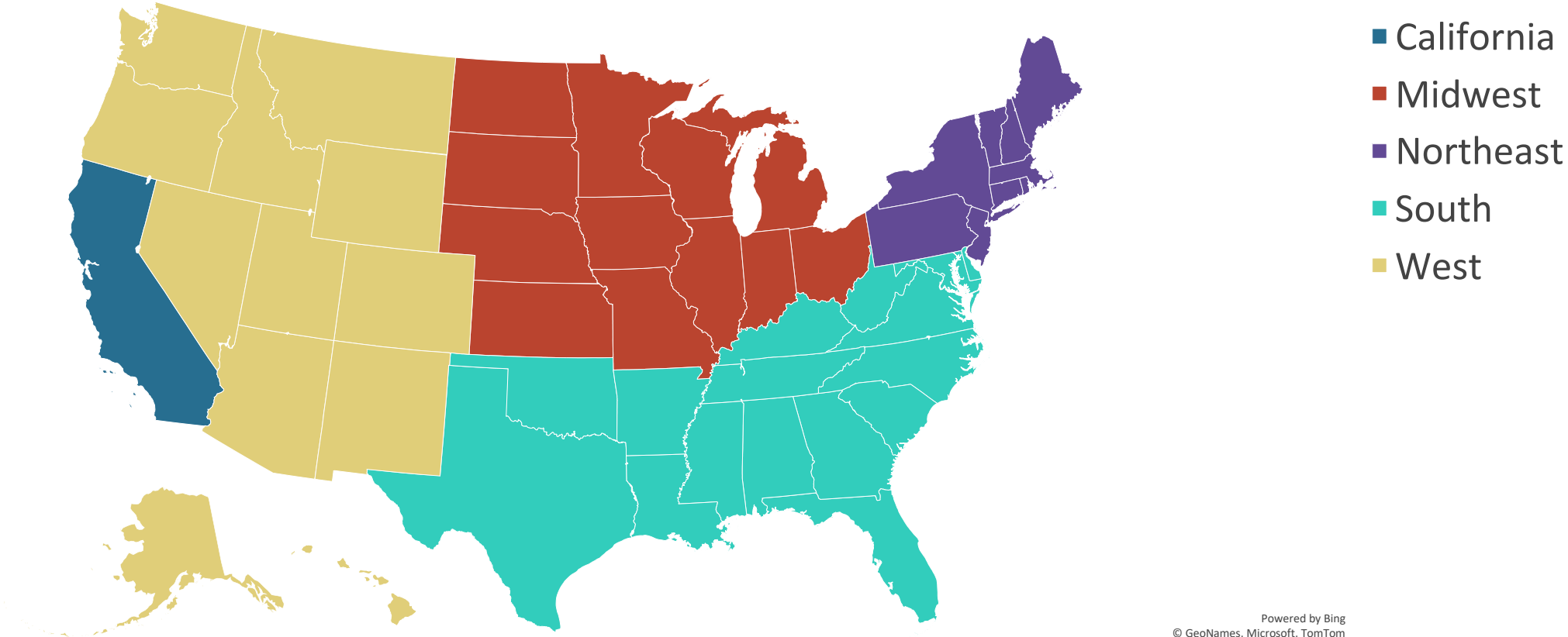
### Licensing Types

**Public Domain:** *A designation for content that is not protected by any copyright law or other restriction and may be freely copied, shared, altered, and republished by anyone.*

**Creative Commons:** *Open license that gives everyone from individual authors to governments and institutions a simple, standardized way to grant copyright permissions to their creative work, provided by Creative Commons.*

# REGIONS

Survey Regions



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# TOPICS

- Pandemic Impact
- Teaching Modalities
- Curricula Materials
- Textbook Formats
- Perspectives on Digital versus Print
- Cost Factor
- Curricula Satisfaction
- OER Awareness
- OER Use
- OER Initiatives

Please let us know if anything is surprising or interesting to you in the chat!

We want to know your feedback on the results – what is most useful for you? What else do you want to know?





# WHAT DID HIGHER EDUCATION LOOK LIKE IN 2021-2022?



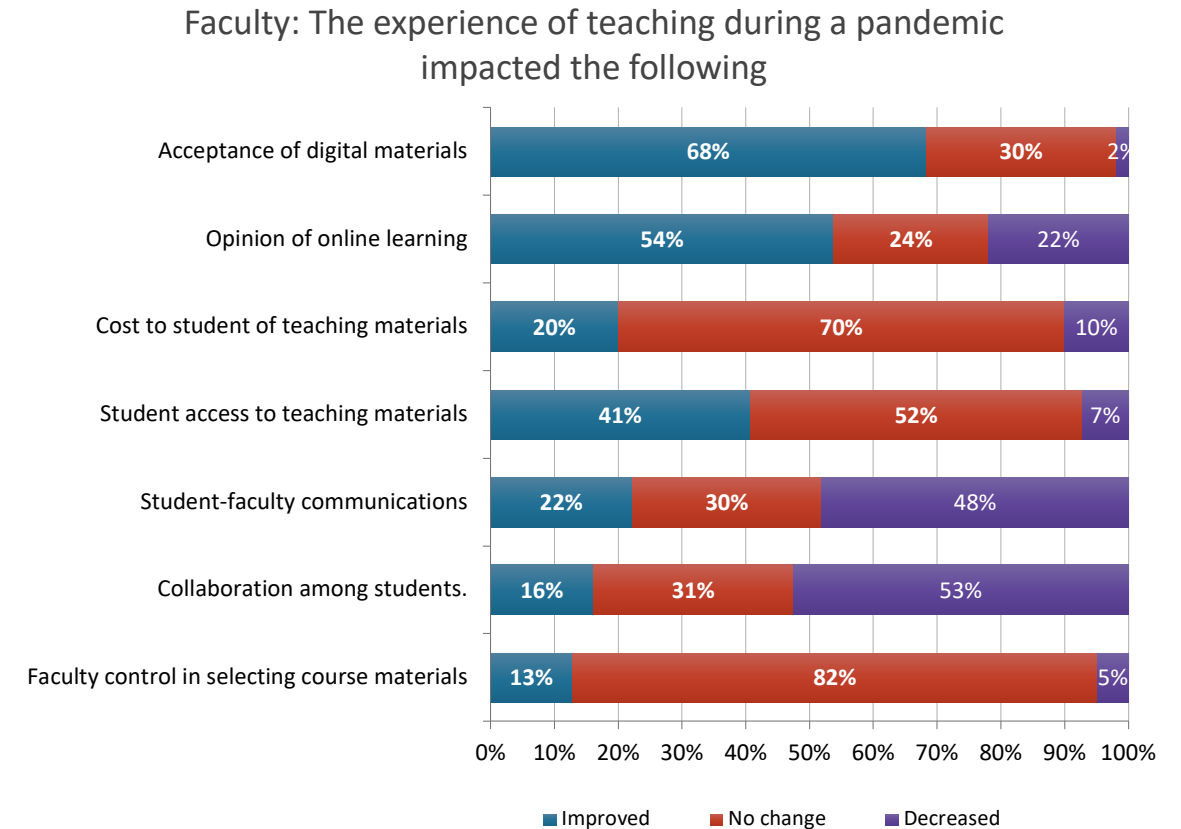
HOW MUCH HAS THE PANDEMIC  
CONTINUED TO IMPACT CLASSROOMS?



HOW DO FACULTY WANT TO TEACH?

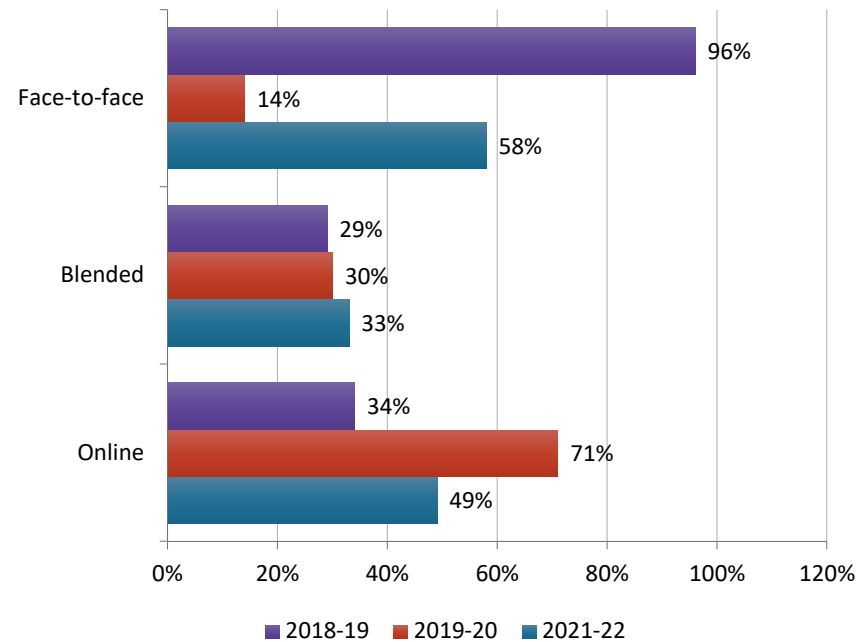
# PANDEMIC IMPACT: BACKDROP FOR THE 2021-2022 YEAR

- Improvements in opinions on digital materials for both faculty and administrators
- Worsened experiences for students
- No major differences across regions

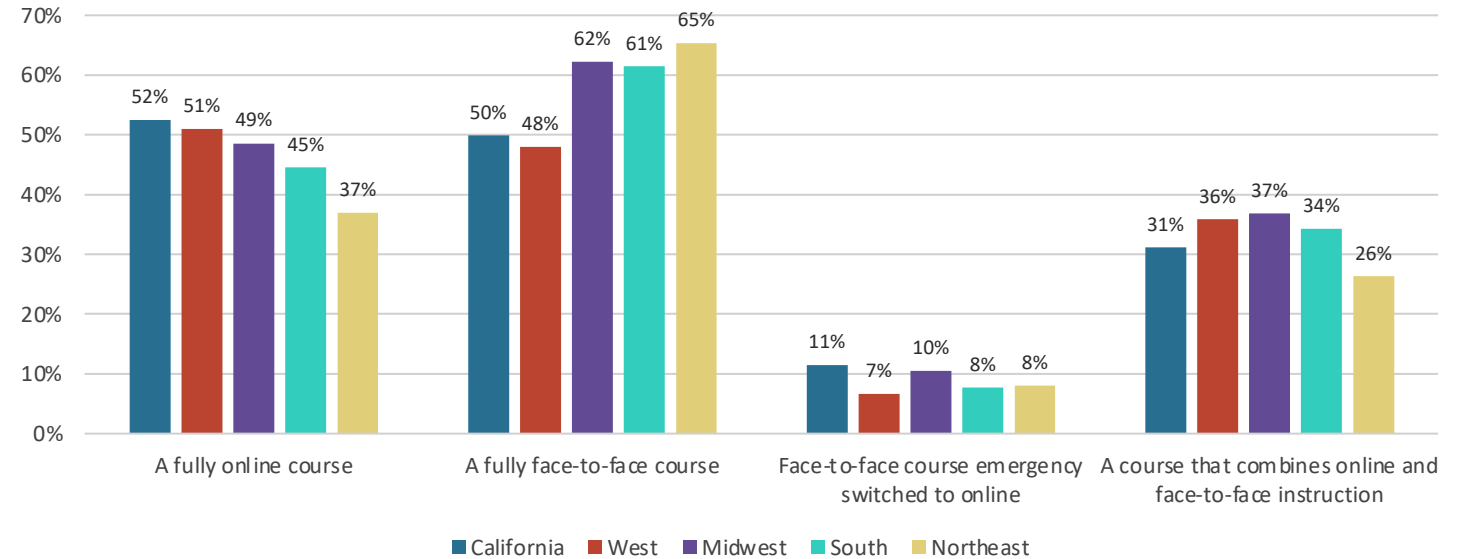


# TEACHING MODALITIES: WESTERN STATES HAVE HIGHER PROPORTION OF FULLY ONLINE COURSES

Faculty: Course Teaching Modality by Year



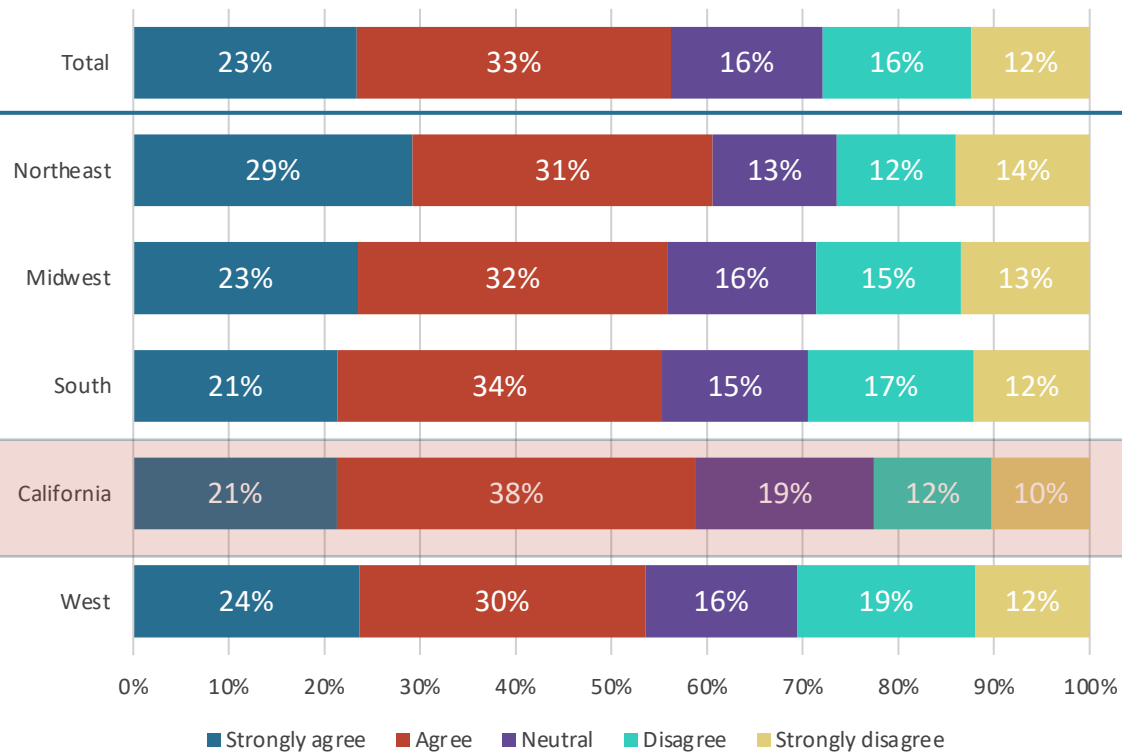
- Nationally, there was a large return to face-to-face teaching, and away from online.
- Face-to-face is still far below pre-pandemic levels



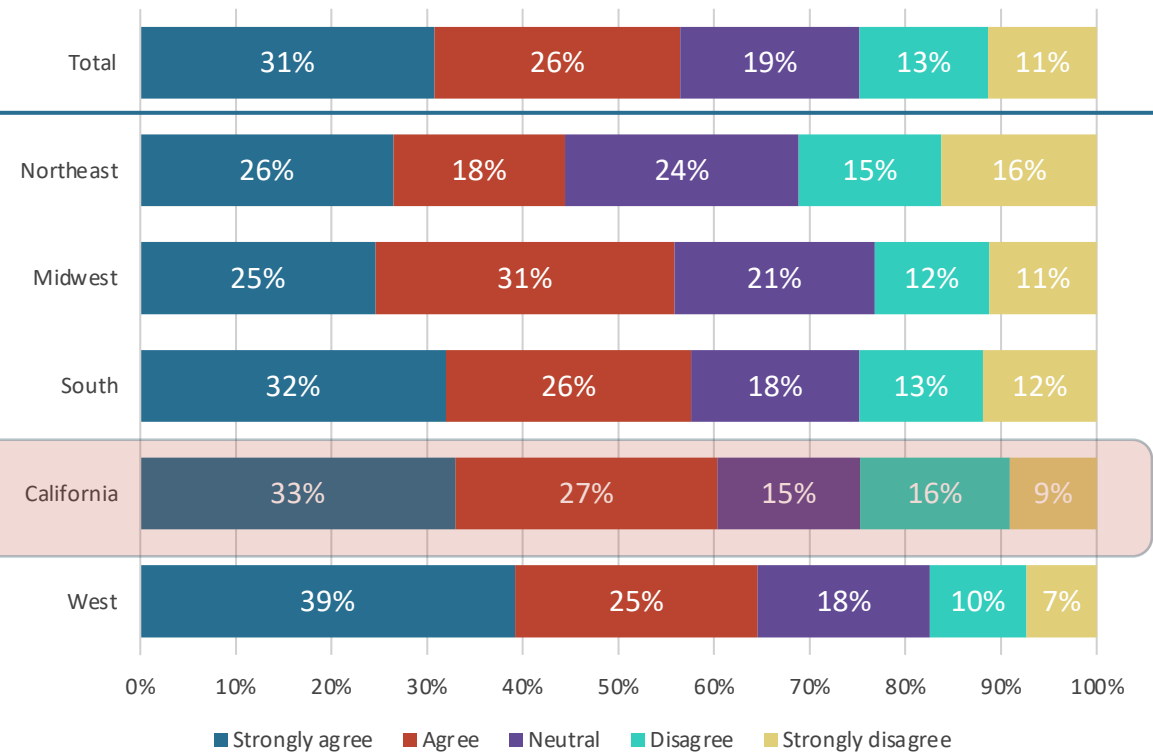
- CA and Western states were more likely to go fully online & not face-to-face
- May be due to 1) higher online course rates in general and/or 2) stronger & longer COVID measures

# TEACHING MODALITIES: MAJORITY OF FACULTY IN THE COUNTRY WANT AN OPTION TO TEACH ONLINE

I would like to teach some of my courses as a **combination of in-person and online instruction.**



I want the option to teach some of my courses in a **fully online format.**



# FACULTY AND ADMINISTRATOR VOICES

*What I observed during the pandemic is that **faculty who had taught online... AND who used a variety of features in their LMS were better positioned** to adapt to the pandemic... This speaks to the need to stay up-to-date with faculty development.*

— **Administrator**

***Online classes turn faculty into content providers.** In person classes allow us to be the educators we are. As teachers we know how to read a room, which is an essential part of the learning experience for our students — and an essential part of teaching. You can't do that with a bunch of rectangles on a screen.*

— **Advanced  
History/Government Faculty**

*The pandemic forced faculty to engage (sometimes unwillingly) with digital course materials and online learning. **What could have taken many years occurred in a very short time frame.***

— **Intermediate Humanities  
Faculty**



# WHAT MATERIALS ARE USED IN COURSES?



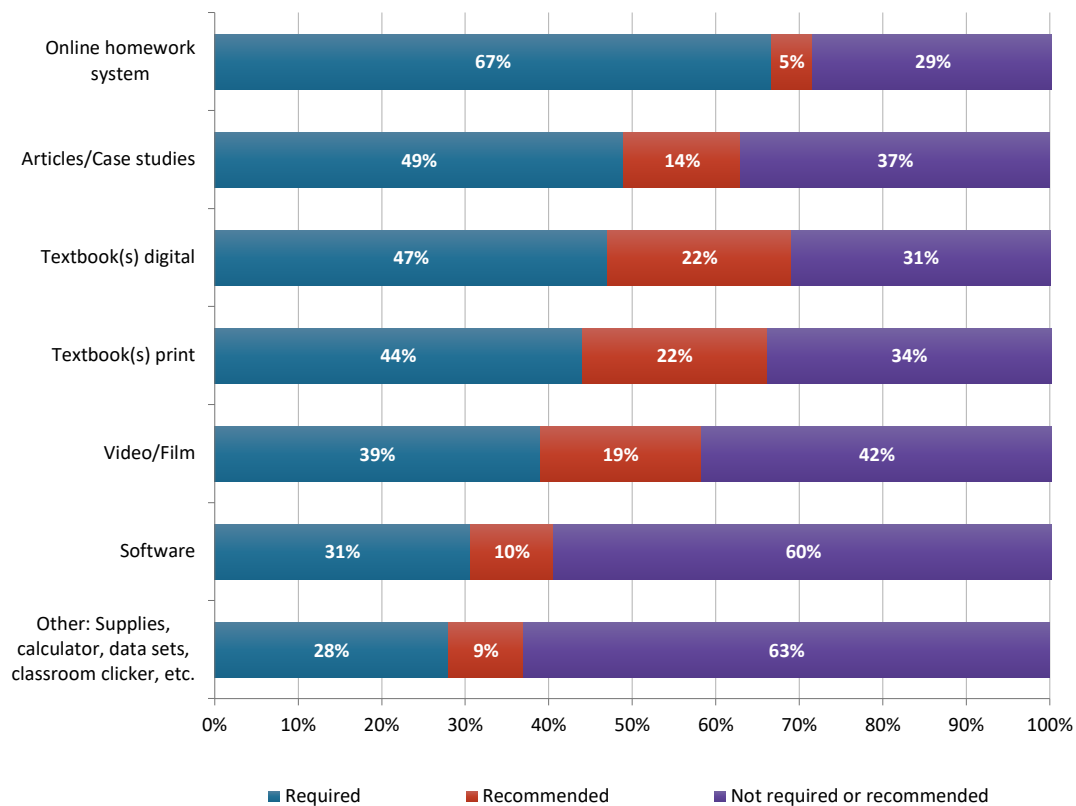
HOW IMPORTANT ARE  
TEXTBOOKS?



HOW MUCH MATERIAL DO  
STUDENTS ACCESS DIGITALLY?

# CURRICULUM MATERIALS: CA LEADS REGIONS FOR REQUIRING DIGITAL TEXTBOOKS

Faculty: Curriculum Materials Used in Teaching

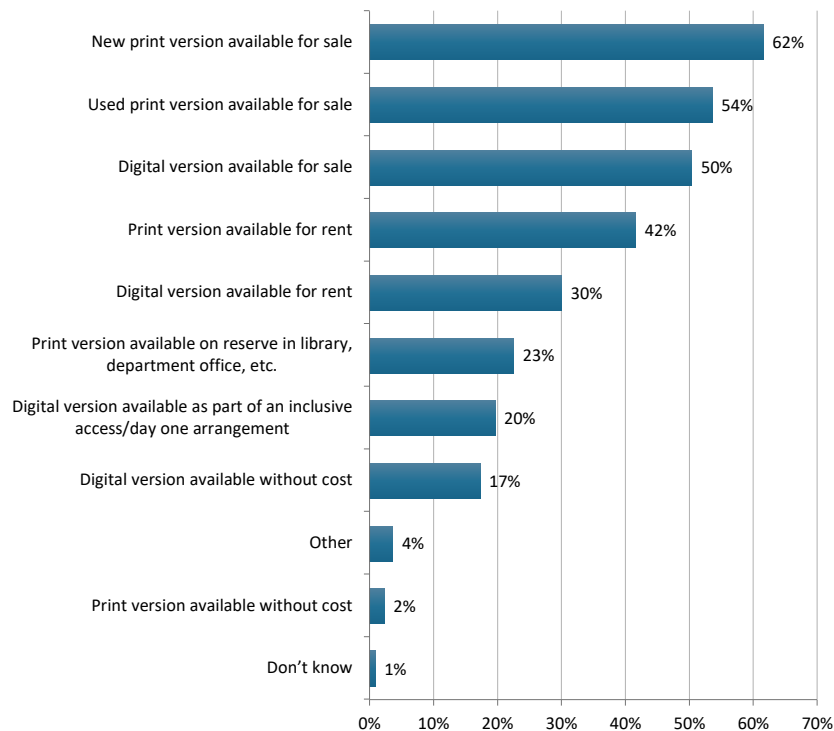


- Online homework systems are the most commonly required curricula material
- Textbooks of any format were required by 60% of faculty
- CA faculty require digital textbooks more than any other region, and much more often than physical (58% vs. 45%), the largest difference in any region

Curriculum Materials	Difference for CA vs. National
Print textbook(s) required	-0.3%
Online homework system required	+1.3%
Software required	+2.2%
Other	+2.7%
Articles/Case studies required	+3.9%
Video/Film required	+7.2%
Digital Textbook(s) required	+10.5%

# TEXTBOOK FORMATS: MANY OPTIONS FOR STUDENTS THOUGH PRINT STILL DOMINATES

Faculty: Primary Textbook Student Availability (select all)



Two-thirds of faculty reported that their textbooks are available in more than one format

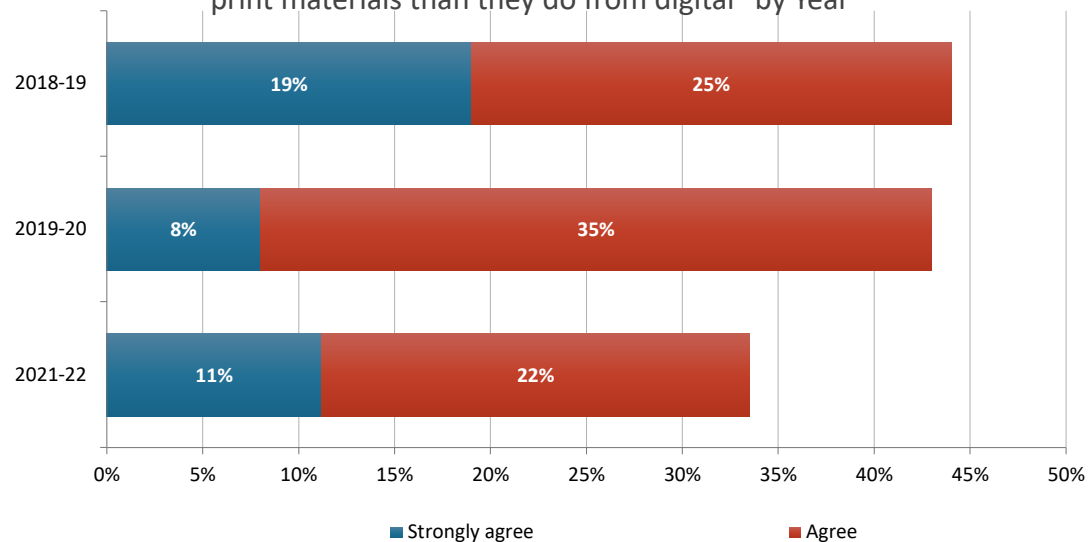
Required Textbook Formats	Difference for CA vs. National
New print version available for sale	-8%
Used print version available for sale	-5%
Print version available for rent	-5%
Digital version available as part of an inclusive access/day one arrangement	-4%
Digital version available for sale	-2%
Print version available without cost	-1%
Print version available on reserve in library, department office, etc.	+1%
Digital version available for rent	+2%
Digital version available without cost	+9%

CA has highest rate of offering free digital texts



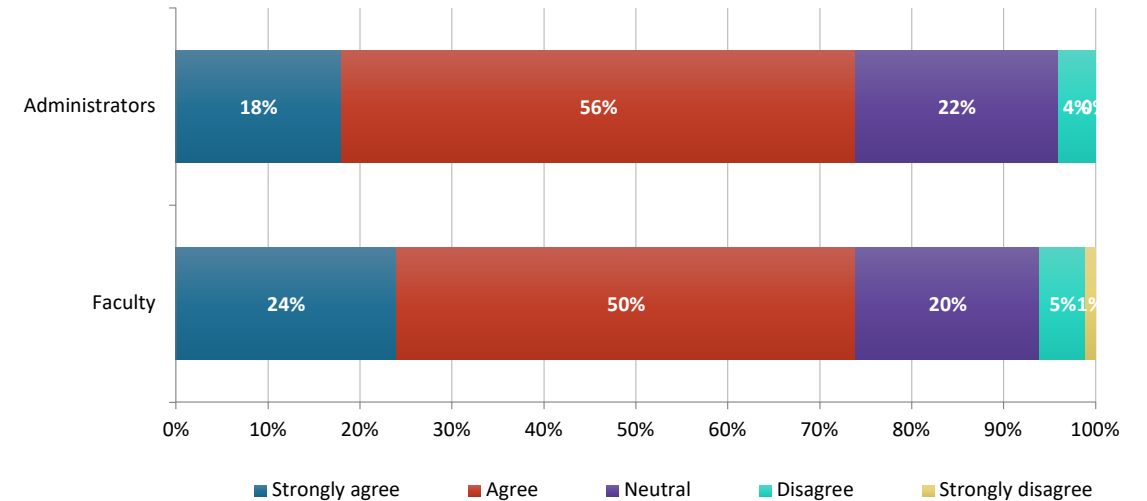
# PERSPECTIVES ON DIGITAL VERSUS PRINT: GROWING ACCEPTANCE OF DIGITAL AS LEARNING MATERIALS

Faculty: Agreement with the statement "Students learn better from print materials than they do from digital" by Year



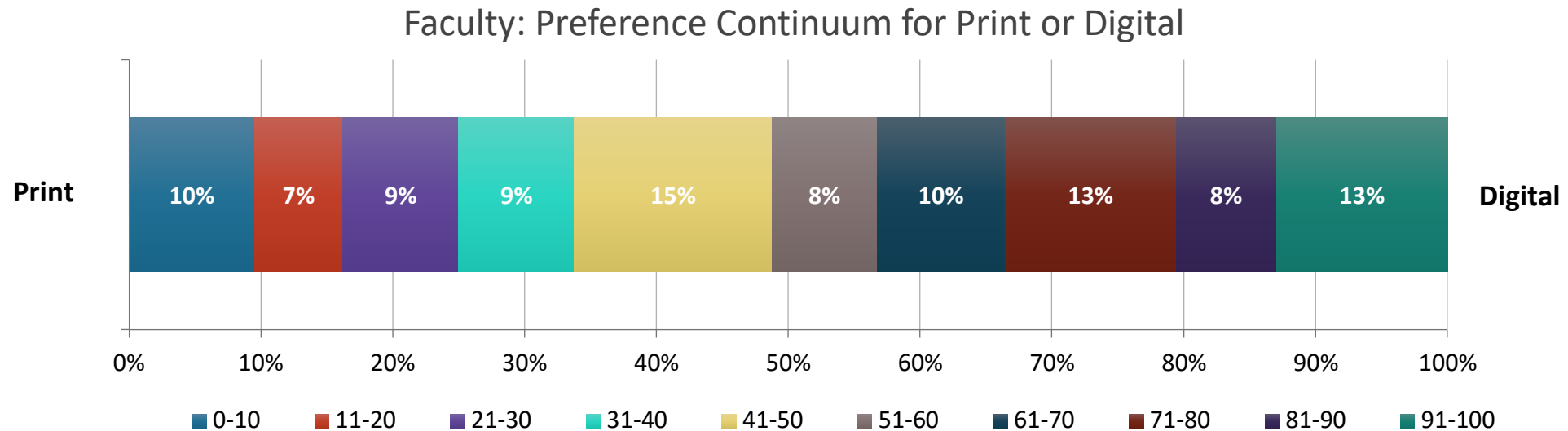
Faculty belief that physical materials are better for learning than digital is declining

Agreement with the statement "Digital materials provide greater flexibility for students."



Both faculty and administrators acknowledge that digital materials offer more flexibility

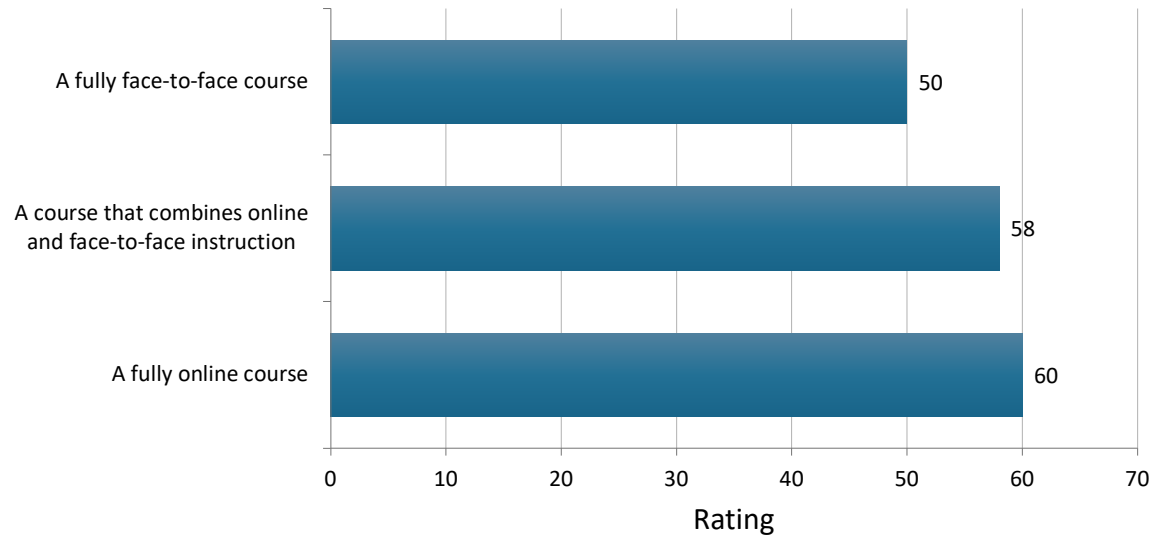
# DIGITAL VS. PRINT PREFERENCES: EVEN ACROSS THE CONTINUUM



- There is no single preference or large group for faculty on the print to digital continuum.
- There are an equal proportion of faculty who want more print or more digital
- Faculty preferences are very diverse: the same course materials are just as likely to be completely preferred by faculty as they are to be criticized.

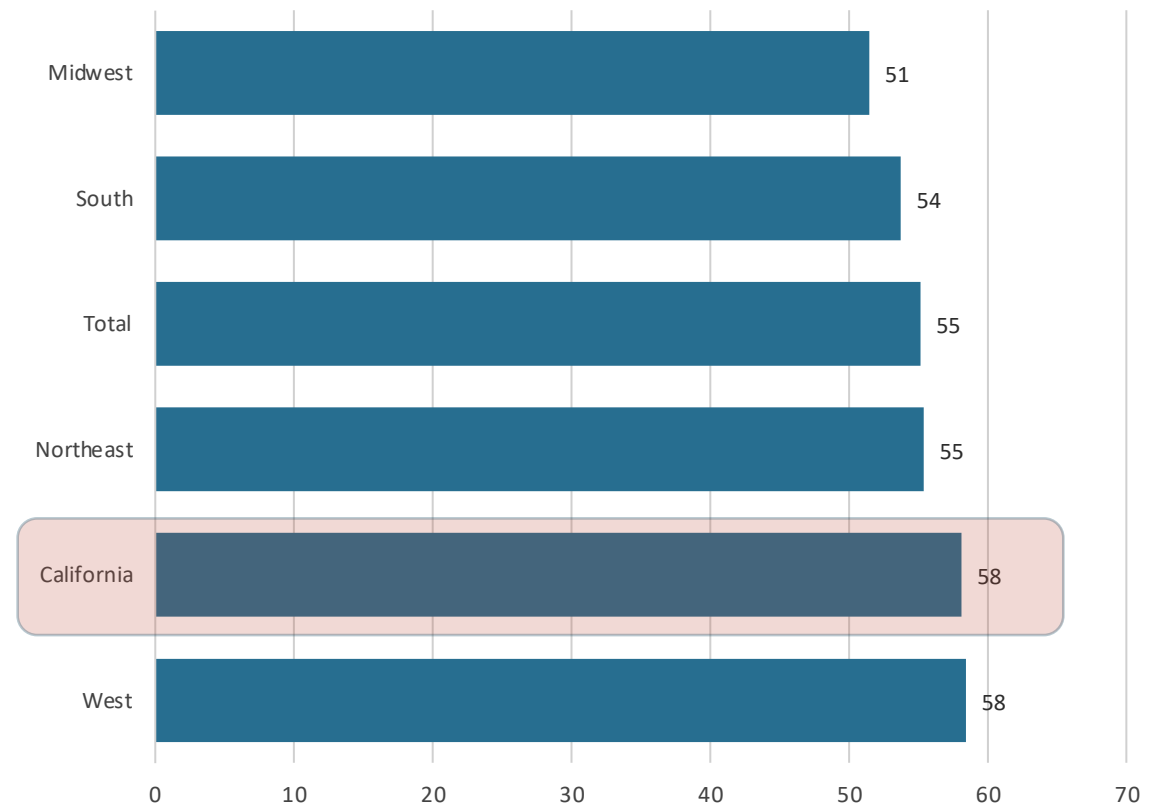
# DIGITAL VS. PRINT PREFERENCES: DIGITAL PREFERRED BY ONLINE COURSE FACULTY AND THOSE IN WESTERN US

Faculty: Average Preference for Print or Digital by Course Modality Preference



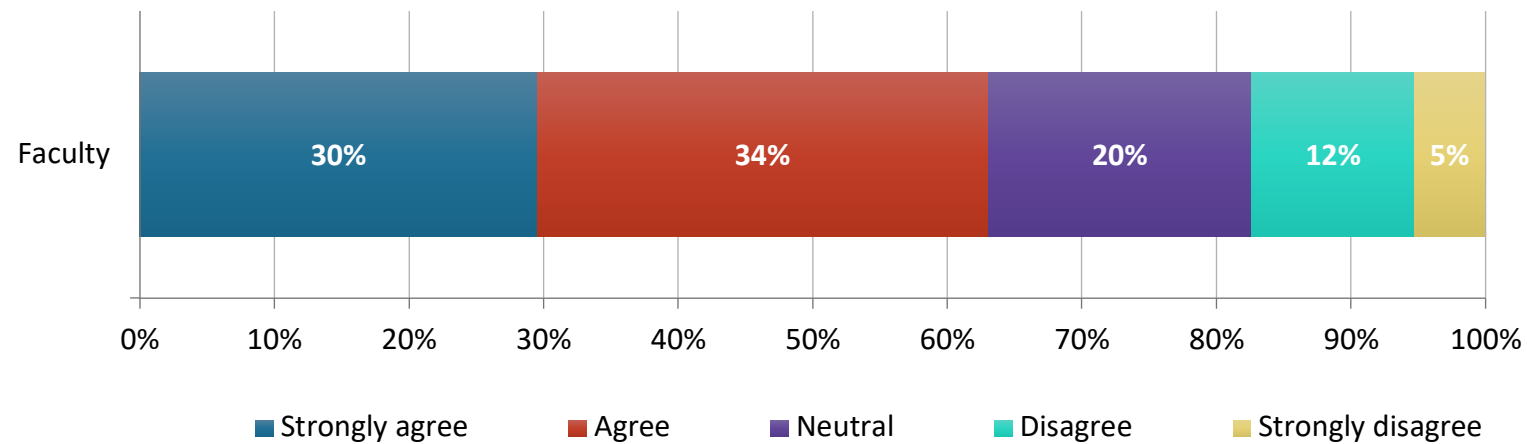
Faculty rated themselves on a 0-100 scale, with “0” preferring all physical and “100” preferring all digital.

Faculty: Average Preference for Print or Digital by Region



# COST FACTOR: MAJORITY AGREE THAT COURSE MATERIAL COSTS ARE A PROBLEM ACROSS THE COUNTRY

Agreement with the statement "The cost of the course materials is a serious problem for my students."



# FACULTY AND ADMINISTRATOR VOICES

*As we are very rural and high poverty, **access to the Internet at home is a real barrier** for our students. Therefore, I never use a digital homework system, since students may not have access when they need it. Also, I won't use a digital textbook with supplements that require always-on Internet access.*

**— Advanced Arts & Literature Faculty**

*The pandemic taught us that many classes or parts of classes can be taught digitally. Students are so tied to their phones and computers, that **not using digital media is a disservice to them**. Faculty is not changing rapidly enough to digital media to keep up with their students.*

**— Intermediate Humanities Faculty**



# HOW GOOD ARE THE MATERIALS IN COURSES?



WHAT FACTORS IMPACT  
FACULTY RATINGS?

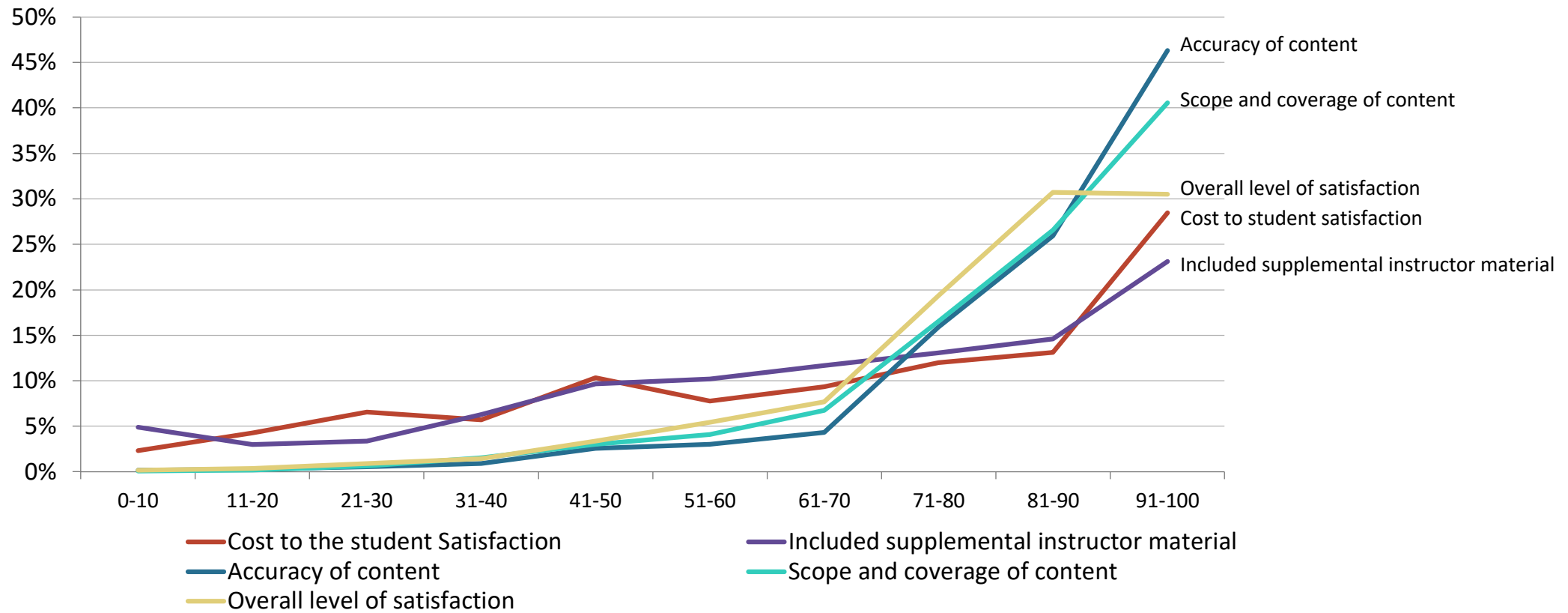


DOES THE PUBLISHER IMPACT  
THE CURRICULUM RATING?



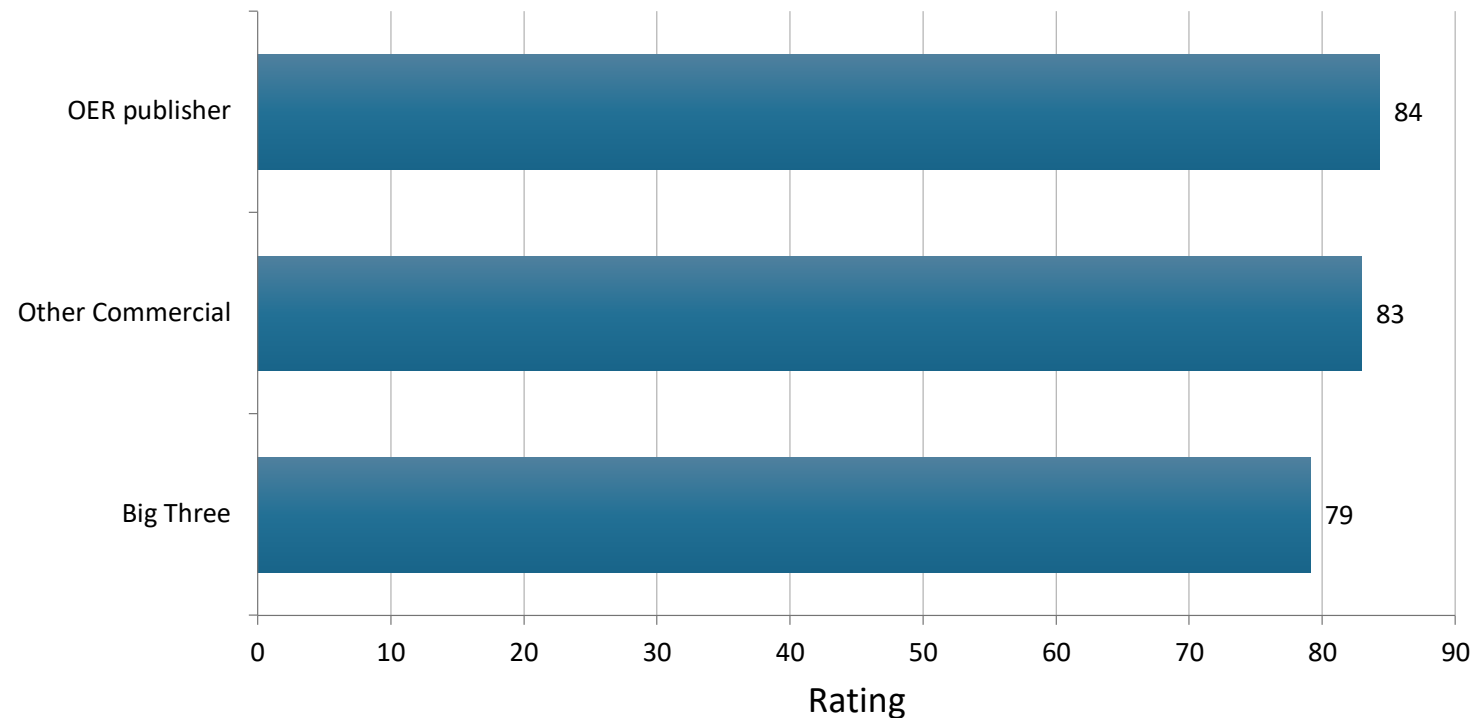
# CURRICULA SATISFACTION: GENERALLY SATISFIED, MORE FOR SCOPE & ACCURACY THAN COST & SUPPLEMENTALS

Faculty: Course Curriculum Ratings



# CURRICULA SATISFACTION: HIGHER FOR FACULTY USING OER MATERIALS

Faculty: Overall Average Course Curriculum Rating by Publisher

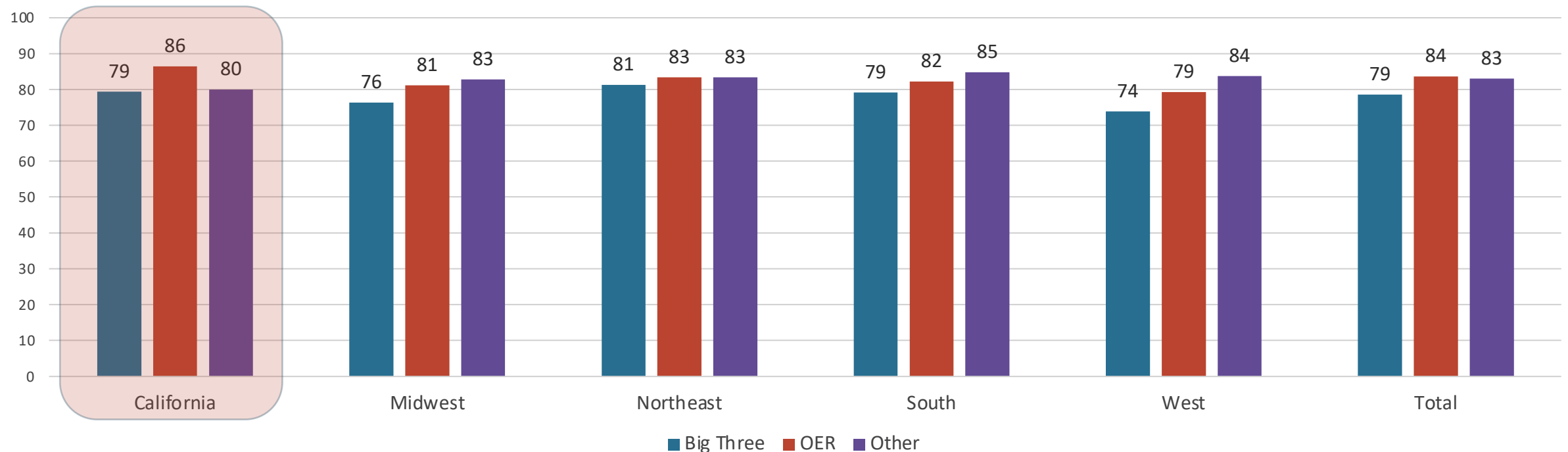


Faculty rated curricula on a 0-100 scale.



# CURRICULA SATISFACTION: HIGHER FOR FACULTY USING OER MATERIALS

Curricula Rating by Publisher and Region



- All regions rate OER curricula higher than Big Three publishers, though many have it on par or below other commercial publishers
- CA rates OER curricula highest of all, and with the largest difference to Big Three's rating

# WHAT IS THE CURRENT STATUS FOR OER?

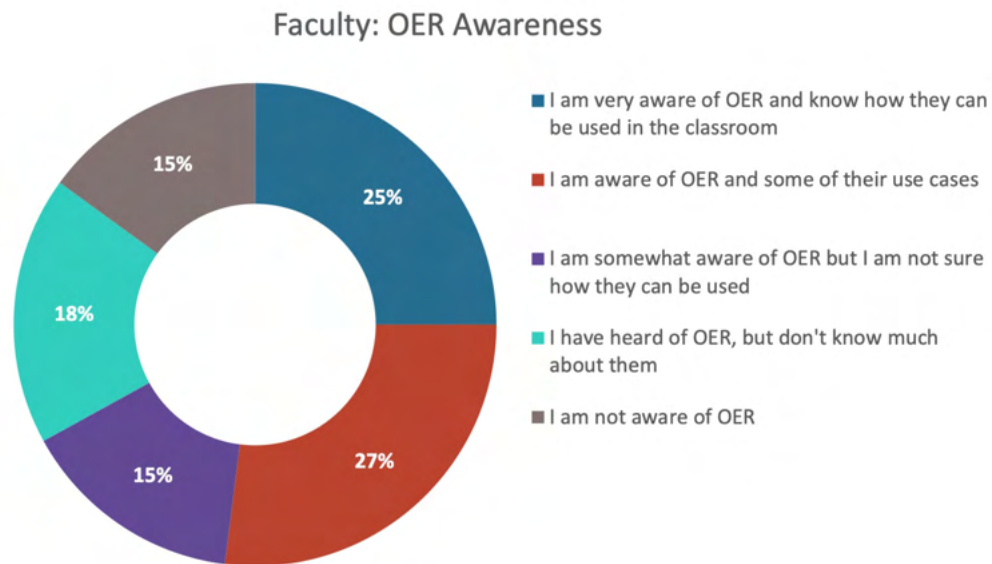


DO FACULTY KNOW WHAT  
OER IS?



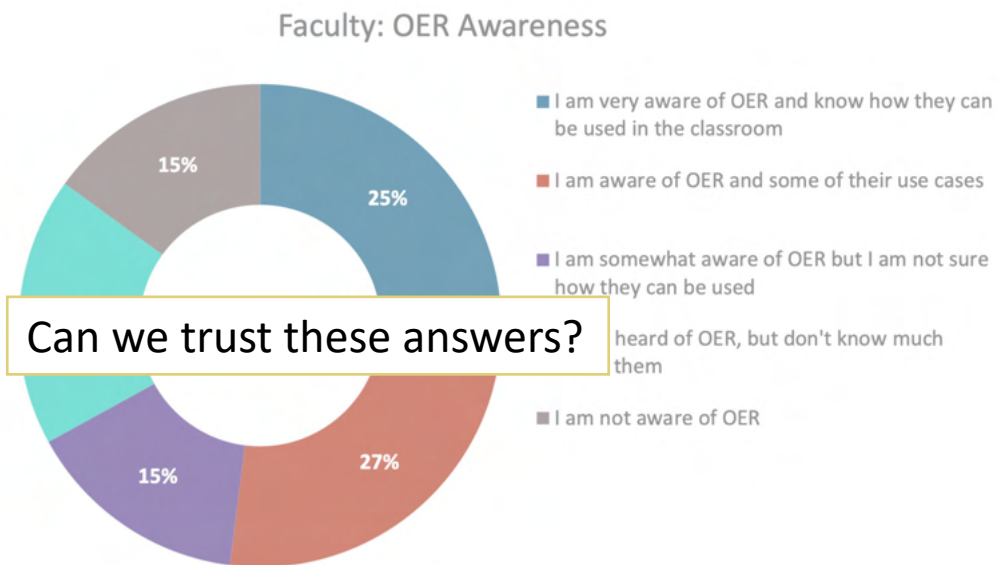
HOW IS OER USED IN  
COURSES?

# OER AWARENESS: TWO-THIRDS OF FACULTY HAVE SOME LEVEL OF OER AWARENESS



- 67% percent of faculty have some level of awareness of OER.
  - 52% saying that are “aware” or “very aware,” and 15% saying they are “somewhat aware.”
- Only 15% of faculty said they are “not aware” of OER.

# OER AWARENESS ON ITS OWN MAY NOT BE A GREAT MEASUREMENT



Faculty who are “Aware” of OER:

- May confuse it with any **free** online materials
- May confuse it with “**open source**” materials

Therefore, this question alone may be imprecise.



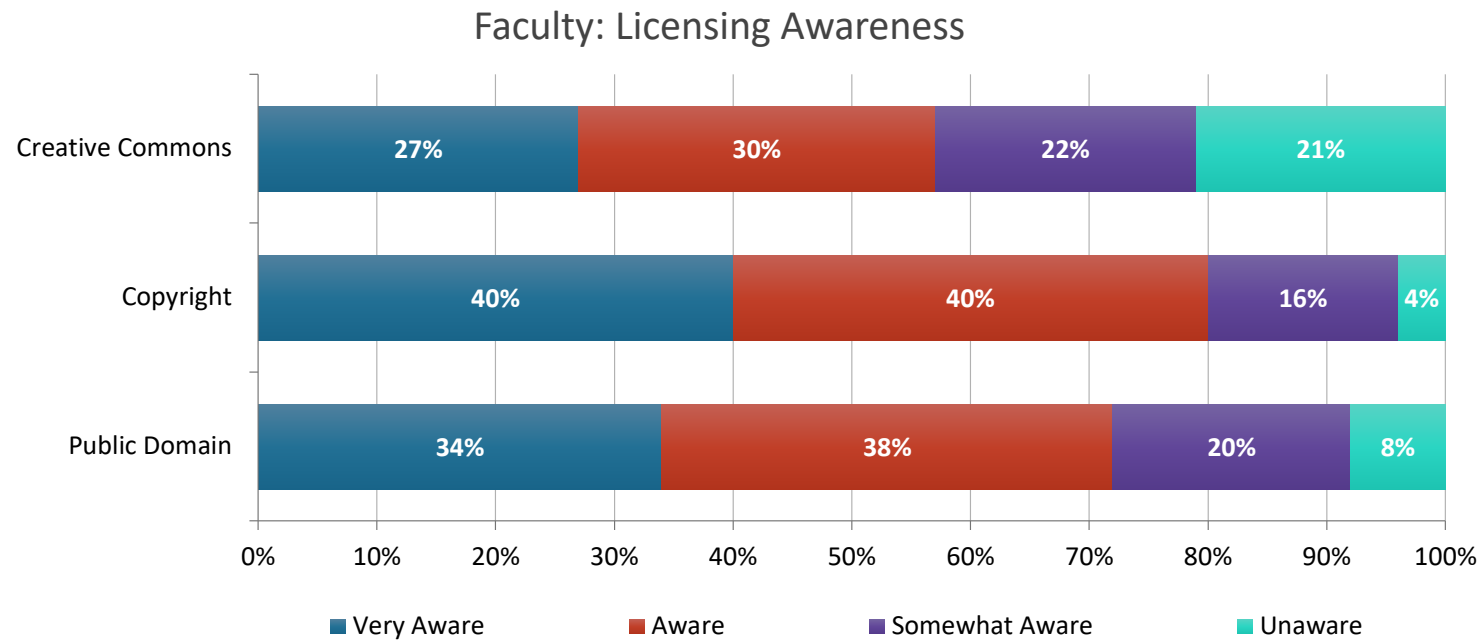
An **improved measurement** for OER Awareness requires a combination of **both OER Awareness and Creative Commons Awareness.**



*Respondents who report that they are unaware of Creative Commons licensing are removed from the "Aware" categories, creating a stricter index of OER awareness*



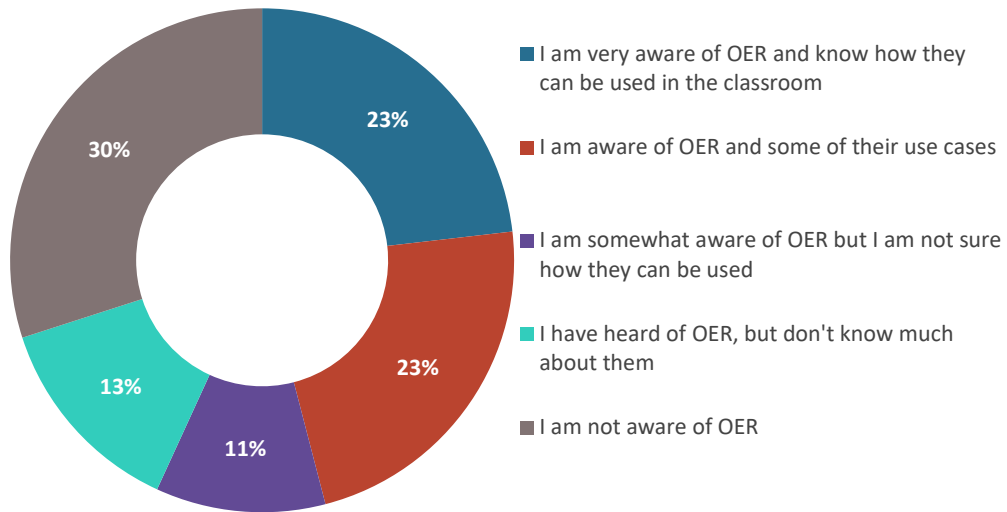
# LICENSING AWARENESS: VERY HIGH LEVELS ACROSS ALL LICENSING TYPES



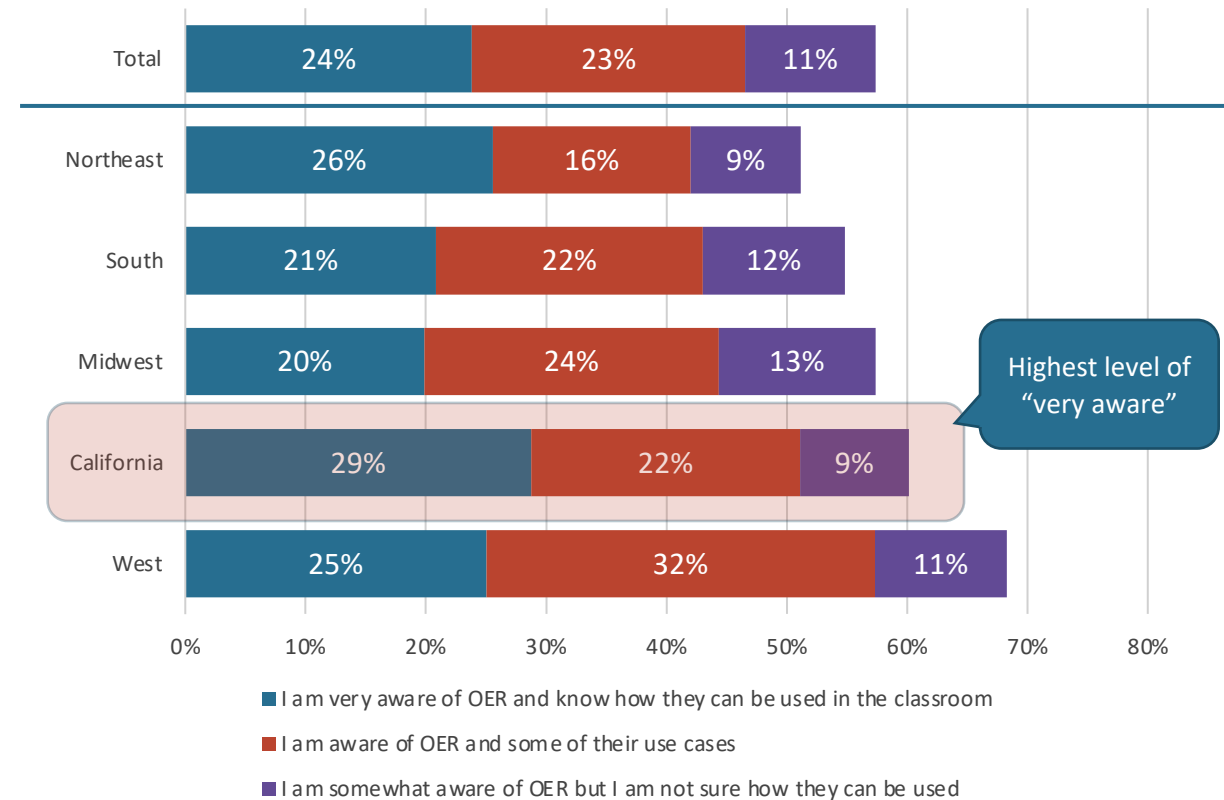
- Over 90% of faculty are somewhat to very aware of both copyright and public domain.
- Awareness of creative commons licensing is just under 80% for any level.
- All three types of licenses have over 50% awareness for aware or very aware, indicating faculty are confident in their own awareness levels.

# OER AWARENESS: WITH STRICTER DEFINITION, LOWER RATE BUT STILL OVER 50%; HIGHER IN WESTERN US

Faculty: OER Awareness Strict

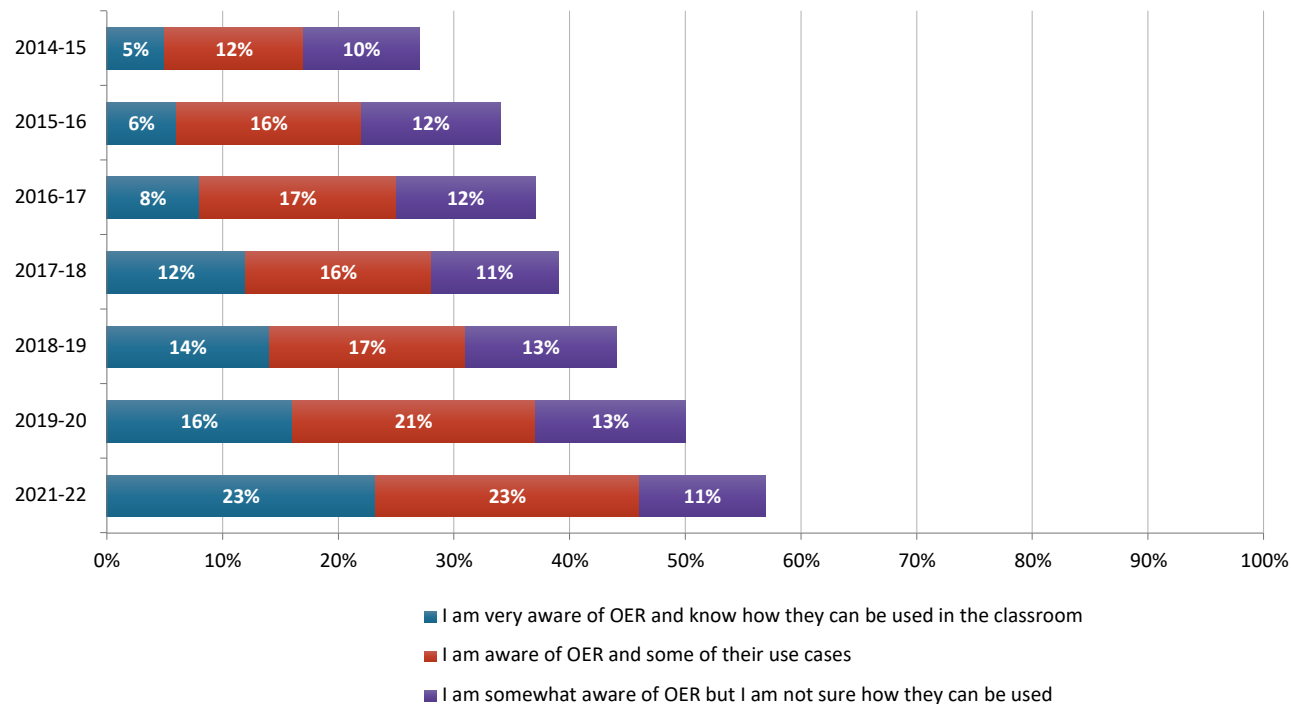


OER Awareness Strict by Region



# OER AWARENESS: GROWING YEAR OVER YEAR

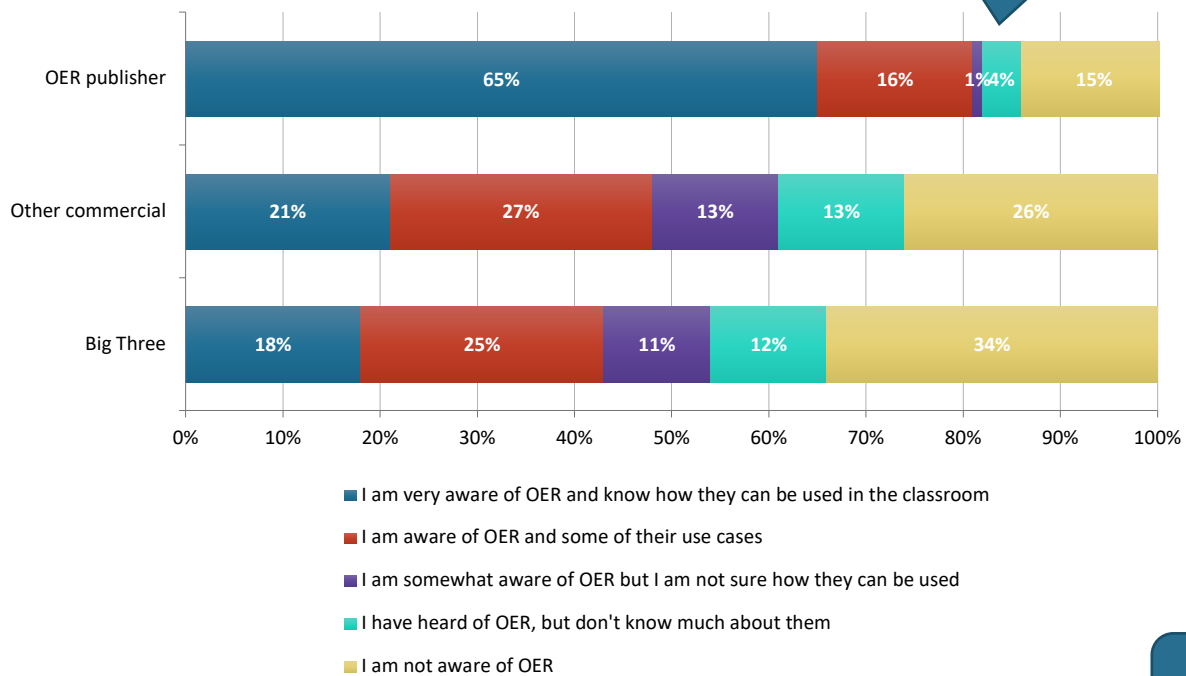
Faculty: OER Awareness (Strict) by Year



- For the first time in our surveys, over half of all faculty have some level of awareness of OER.
- OER awareness has grown by 7% since 2020.
- Since 2014-15, OER awareness has more than doubled.

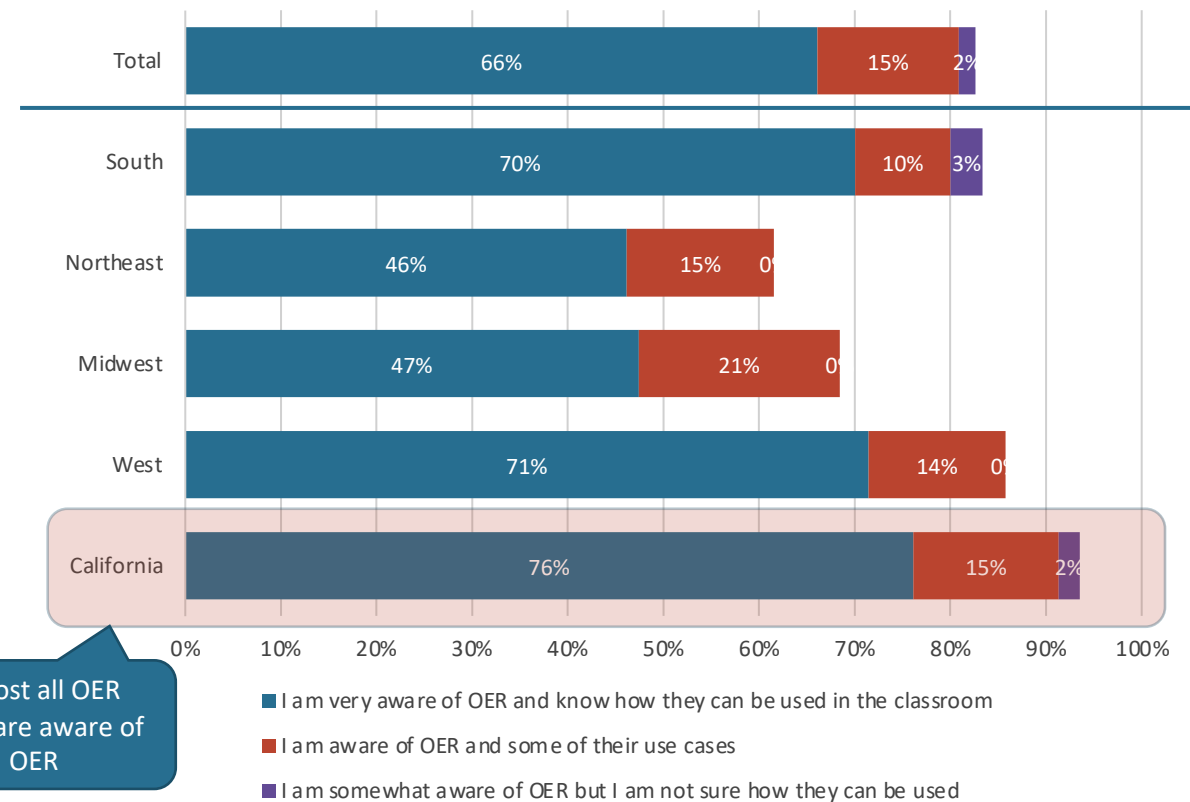
# OER AWARENESS: VARIES BY PUBLISHER AND REGION

Faculty: OER Awareness (Strict) by Publisher



20% OER users are not aware of OER

OER Awareness for OER Publisher by Region

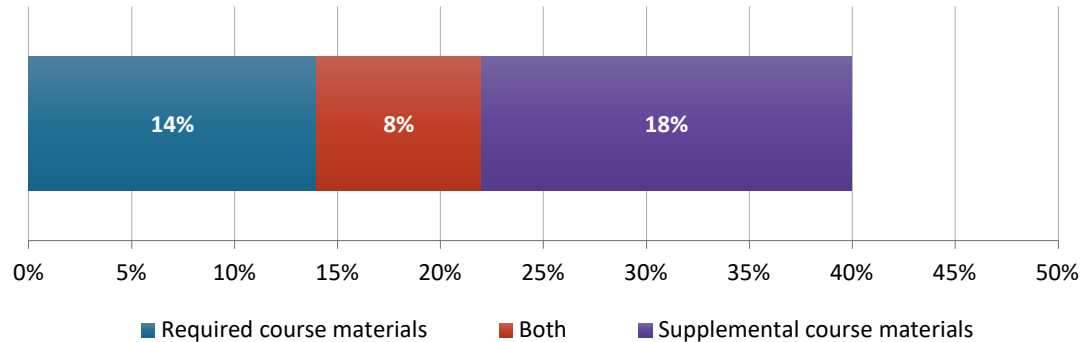


Almost all OER users are aware of OER

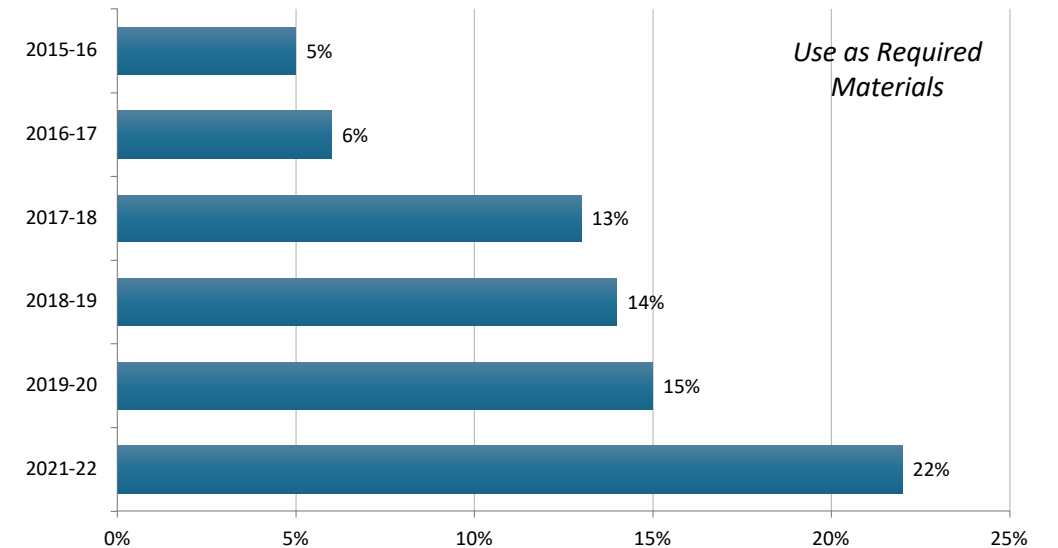


# OER USE CONTINUES TO GROW: ALMOST HALF OF FACULTY REPORT USING OER IN THEIR COURSES

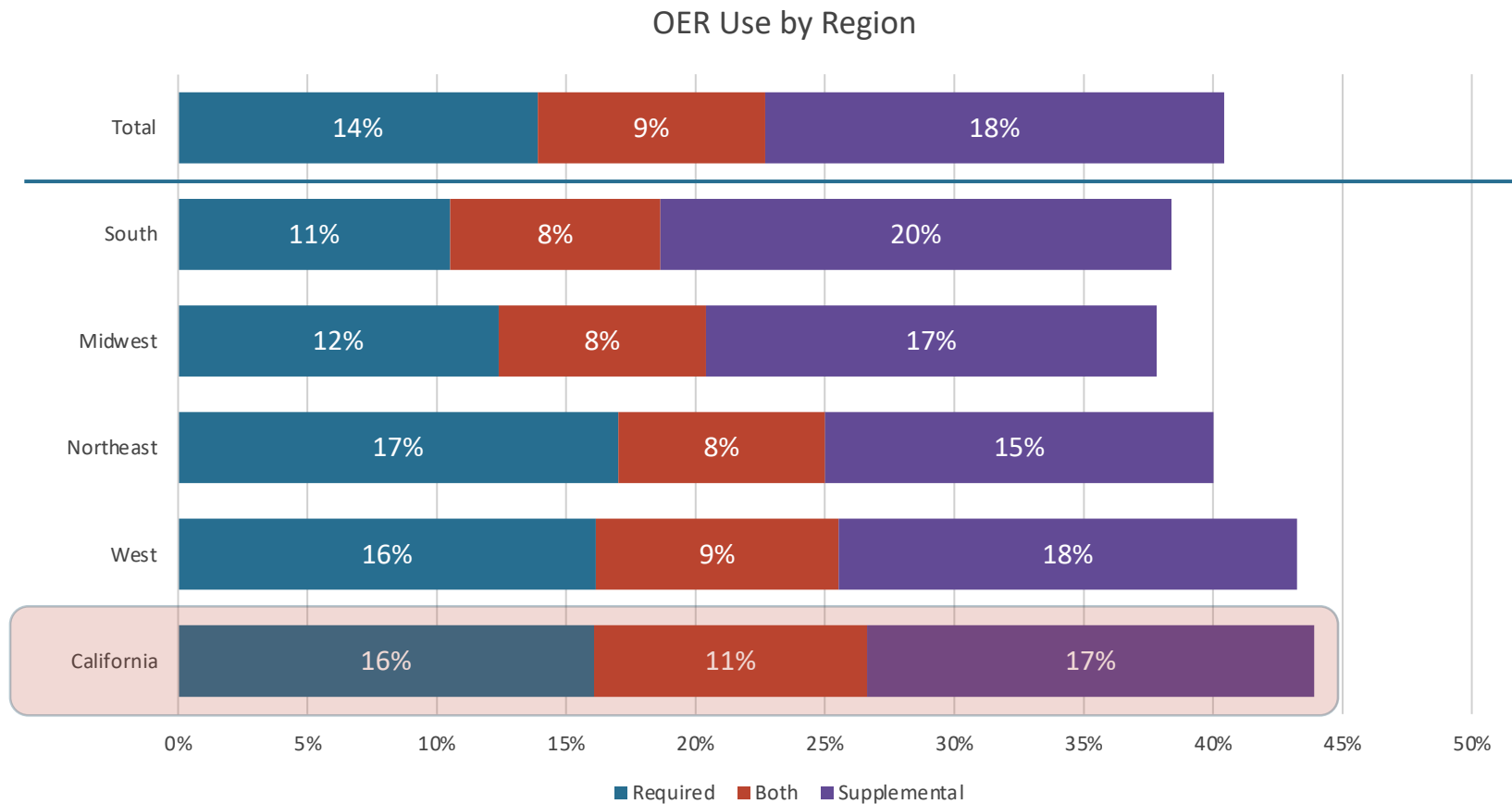
Faculty: Use of OER Materials in Courses



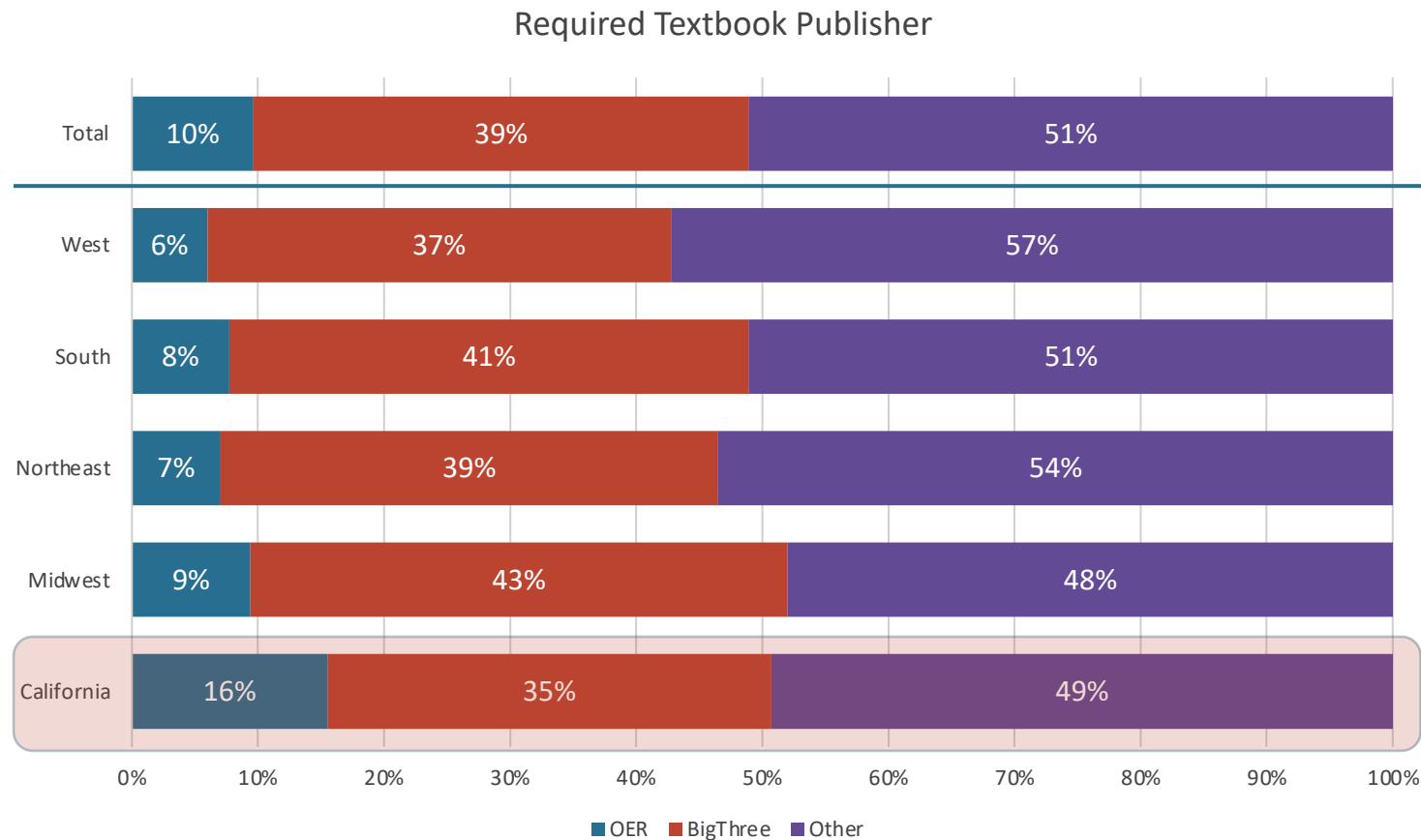
Faculty: Use of OER Materials in Courses by Year



# OER Use: CA HAS THE HIGHEST OER USE RATES



# OER USE: ONLY A SMALL NUMBER OF FACULTY REQUIRE AN OER TEXTBOOK FOR THEIR COURSE



- CA has highest proportion of OER publishers for the required course textbook
- Big Three publishers – Cengage, McGraw, and Pearson – hold ~40% of the market
- 100+ publishers make up the other commercial publishers



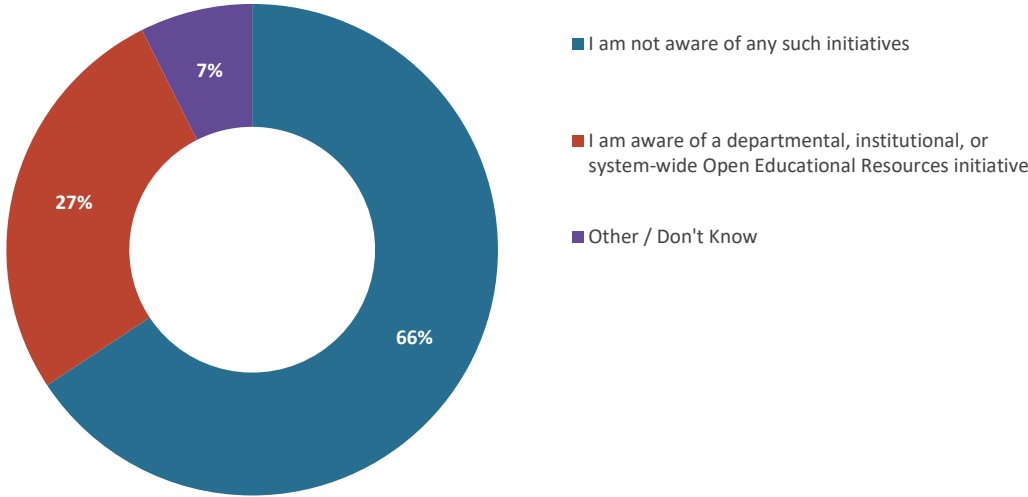
# OER Use: OPENSTAX IS MOST COMMON PUBLISHER

	California	Midwest	Northeast	South	West	Total
OpenStax	36%	39%	36%	40%	71%	39%
OER Commons	27%	17%	36%	17%	14%	23%
Open Textbook Library / Open Textbook Network	16%	11%	7%	10%	0%	11%
Other	4%	11%	21%	17%	0%	11%
Lumen Learning	0%	6%	0%	10%	14%	4%
Flatworld	7%	11%	0%	0%	0%	4%
Top Hat	2%	6%	0%	3%	0%	3%
Libre Texts	7%	0%	0%	0%	0%	3%
My Open Math	2%	0%	0%	3%	0%	2%

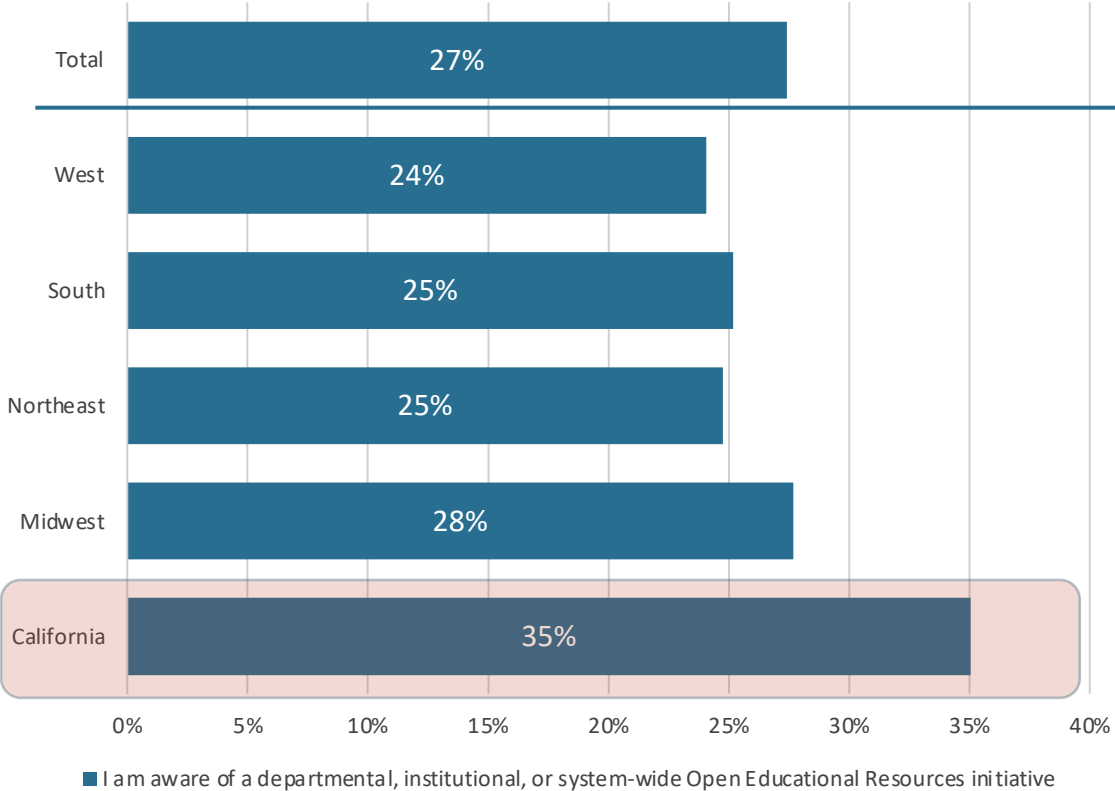
- OpenStax is the most common OER publisher and 4<sup>th</sup> common publisher overall
- OER Commons and Open Textbook Library are also common
- “Other” are often self- or department-published textbooks

# OER INITIATIVES: MAJORITY OF FACULTY ARE UNAWARE; CA HAS HIGHER AWARENESS THAN ANY OTHER REGION

Faculty: OER Initiative Awareness



OER Initiative Awareness



# FACULTY AND ADMINISTRATOR VOICES

*Having moved to open resources, I will **never again use expensive text books**. Using OER and an array of supplemental texts enables me to customize my art history courses in response to current events and discoveries, to keep the courses fresh and engaging, and - most importantly for my predominantly low-income students - to ensure that the source materials are free to them.*

**– Introductory Arts & Literature Faculty**

*I would love to use OER for cost benefit to my students. Until they can match the adaptive learning component of McGrawHill's SmartBook, I'm not sure how much I'll consider them. I've seen such significant improvements in student learning, that **I'm not sure it's worth going to an OER option at the expense of student learning**.*

**– Introductory Other Discipline Faculty**



# SO...WHAT DO ALL THESE DATA MEAN FOR OER?



HOW DOES OER AWARENESS AND  
OER USE OVERLAP?



DO OER INITIATIVES HAVE AN  
IMPACT ON AWARENESS OR USE?

# PUTTING IT ALL TOGETHER – OER AWARENESS, INITIATIVE AWARENESS, AND OER USE

## Three measures of OER

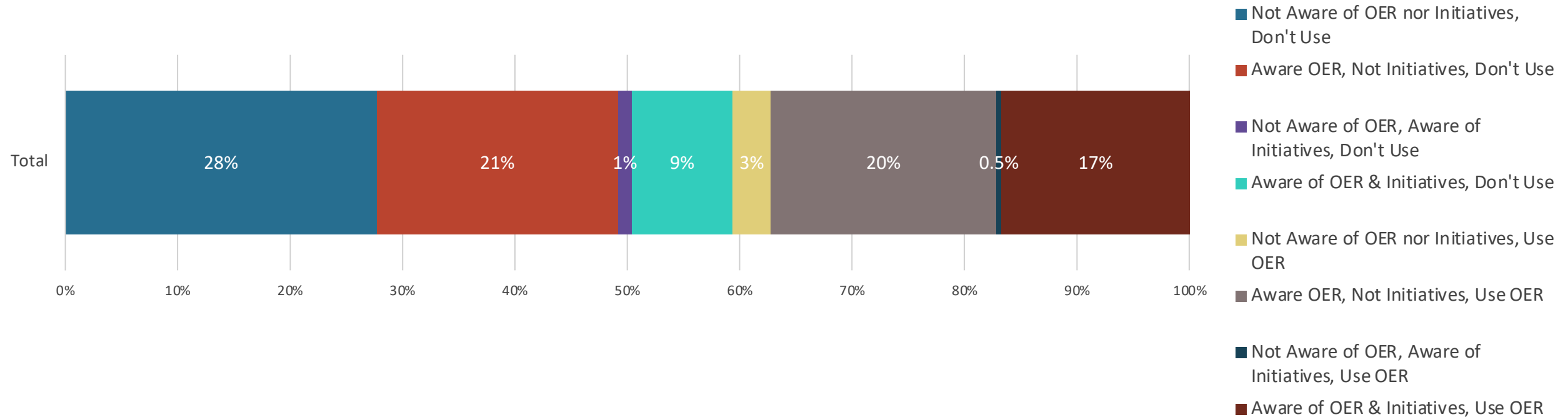
- OER Awareness
- OER Initiative Awareness
- OER Use

Aware of OER	Aware of Initiative	Use OER
No	No	No
<b>Yes</b>	No	No
No	<b>Yes</b>	No
<b>Yes</b>	<b>Yes</b>	No
No	No	<b>Yes</b>
<b>Yes</b>	No	<b>Yes</b>
No	<b>Yes</b>	<b>Yes</b>
<b>Yes</b>	<b>Yes</b>	<b>Yes</b>



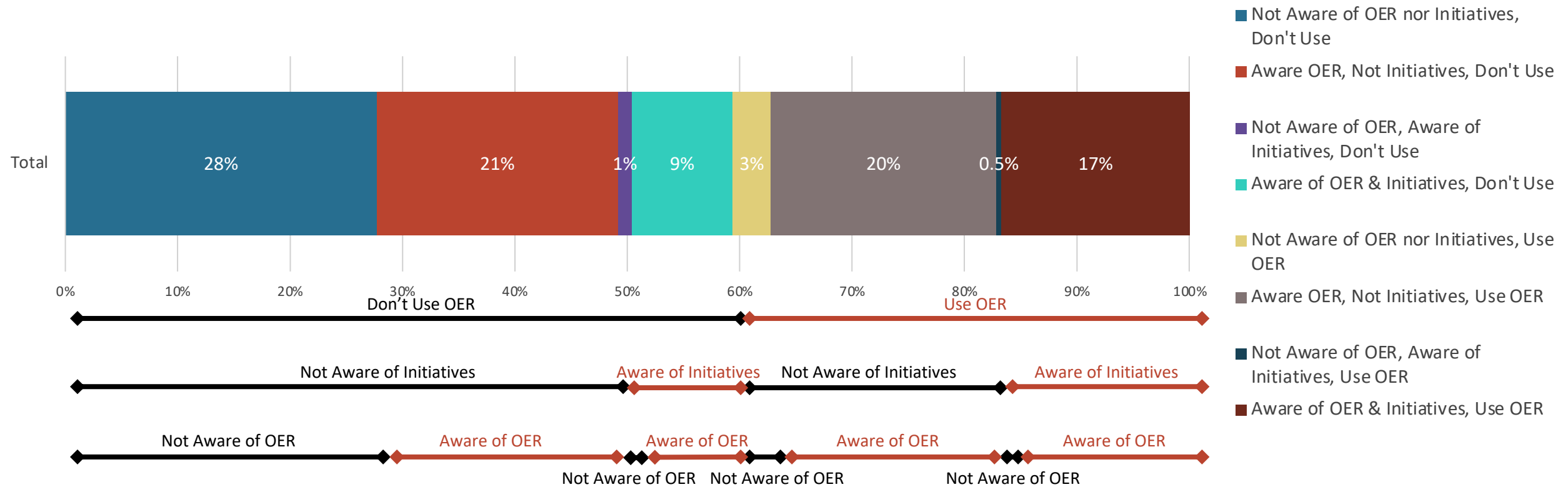
# PUTTING IT ALL TOGETHER – OER AWARENESS, INITIATIVE AWARENESS, AND OER USE

Overlap of Awareness and Use



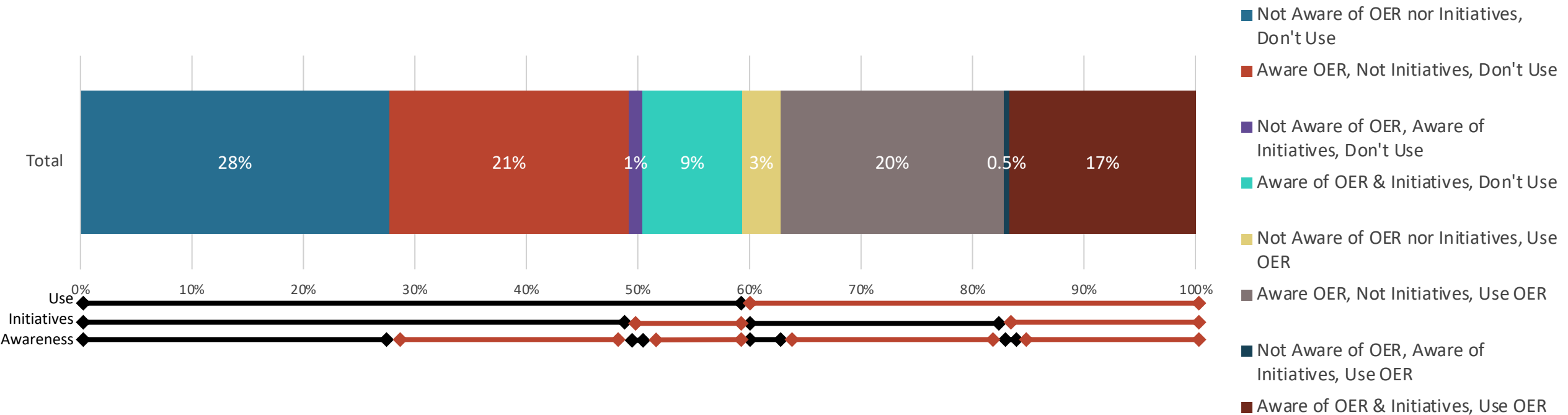
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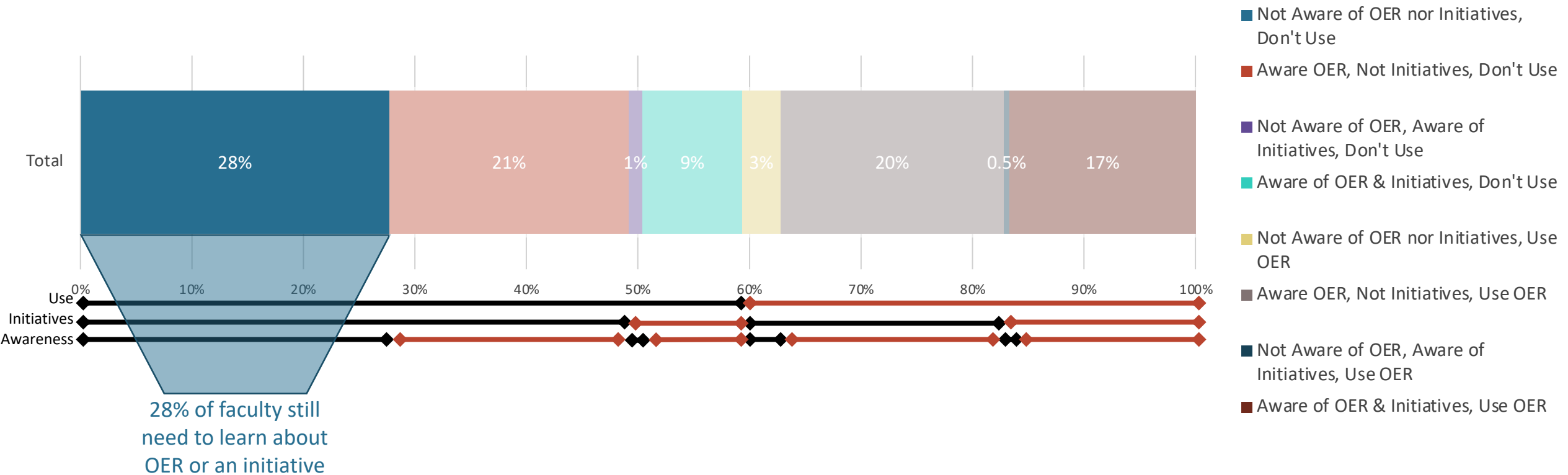
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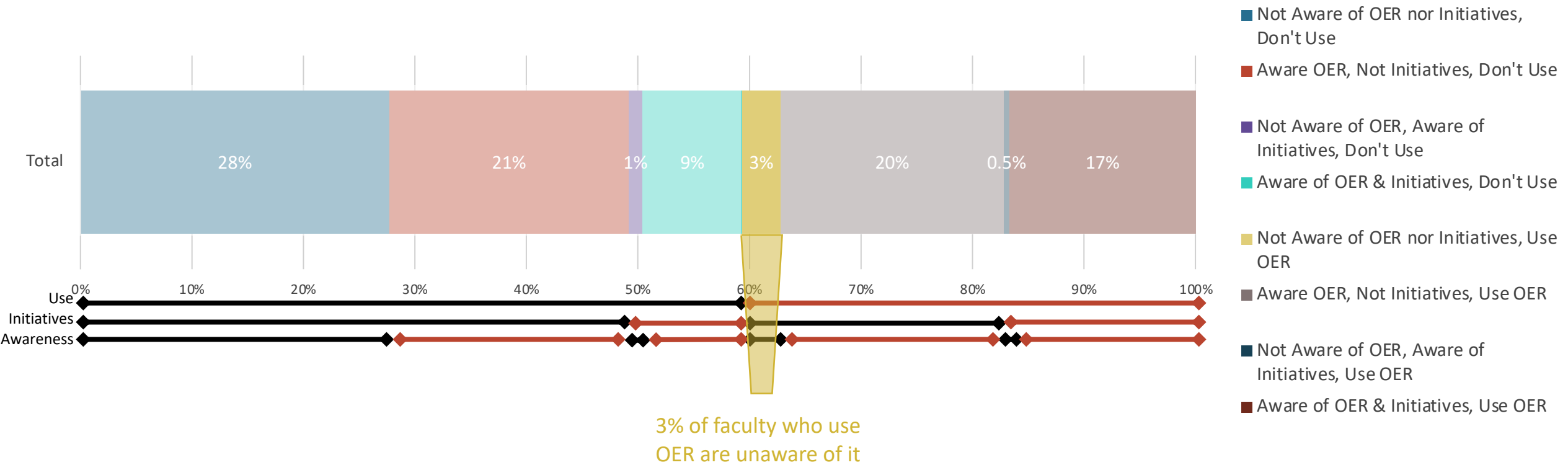
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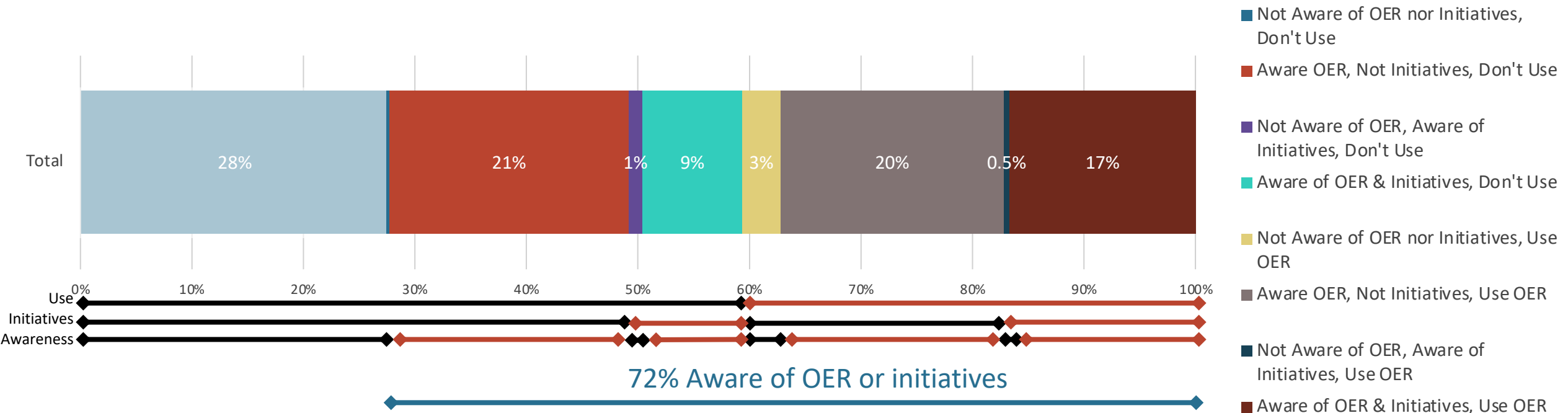
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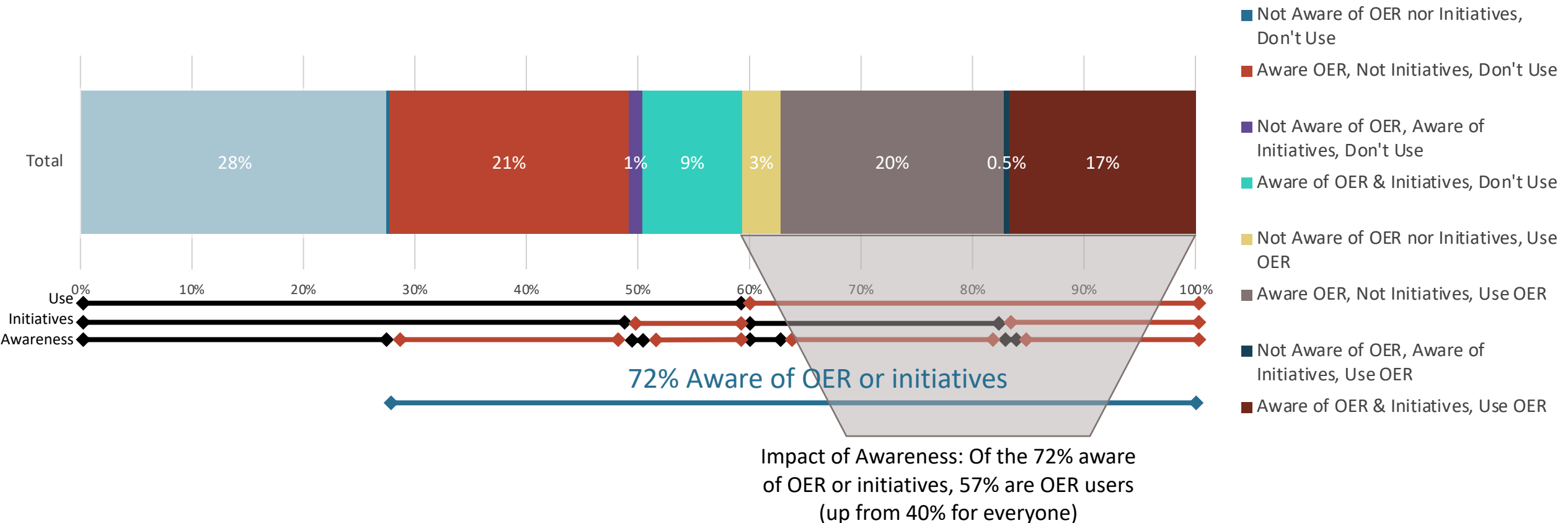
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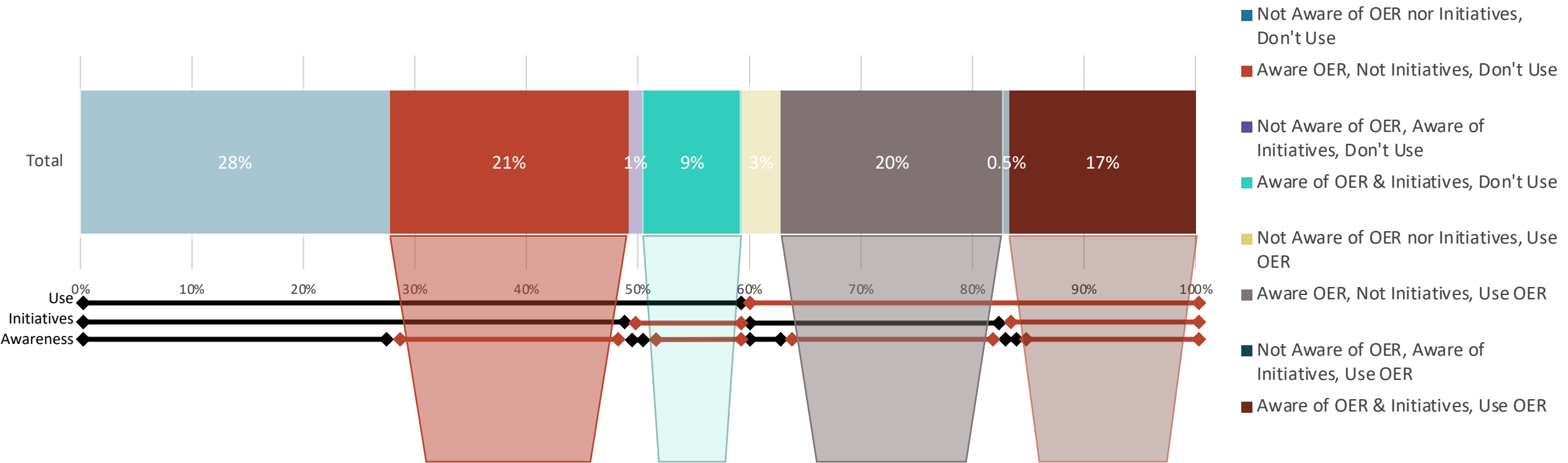
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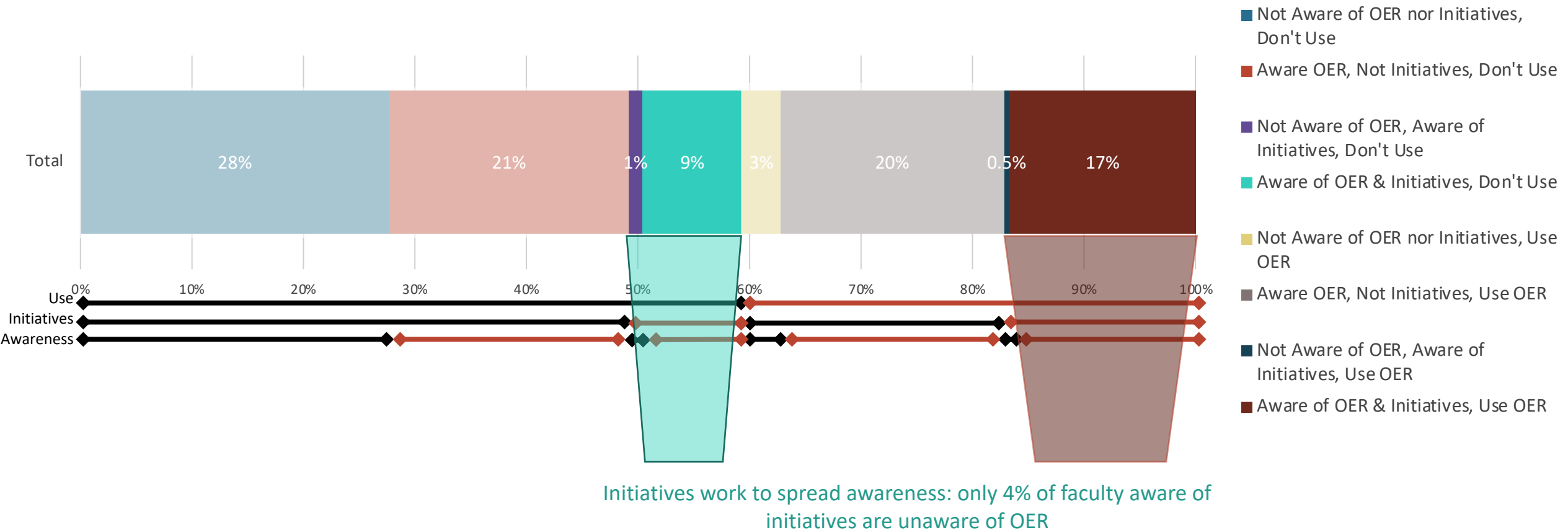


Self-Awareness: Of the 67% aware of OER, over half are unaware of initiatives



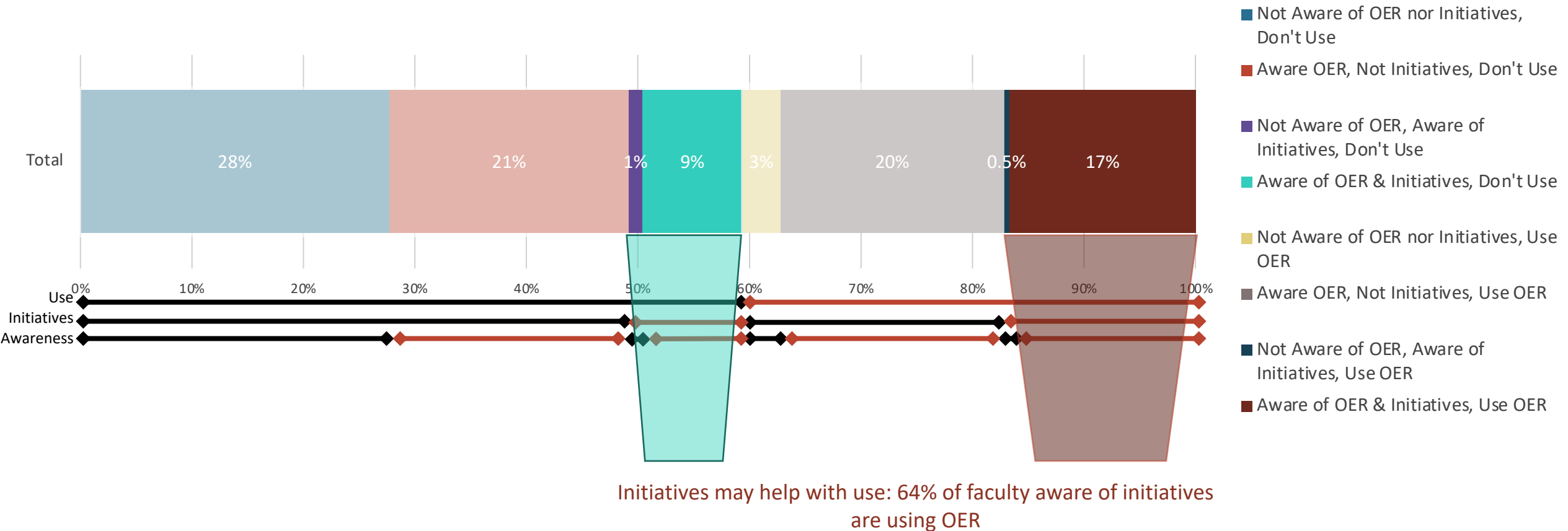
# PUTTING IT ALL TOGETHER – OER AWARENESS, INITIATIVE AWARENESS, AND OER USE

Overlap of Awareness and Use



# PUTTING IT ALL TOGETHER – OER AWARENESS, INITIATIVE AWARENESS, AND OER USE

Overlap of Awareness and Use



# RESULTS SUMMARY

- While students are returning to the classroom, there has not been a return to pre-pandemic levels.
  - Faculty and administrators have expressed a growing acceptance, and even preference for online or blended learning environments, as well as digital courseware
- Cost to students is a major concern for both faculty and administrators
  - Required textbooks are most commonly available as physical and then digital, both for a fee; free options exist, albeit in limited numbers
  - 86% of administrators and 64% of faculty agree that the cost of course materials is a serious problem
- Acceptance of digital course materials has grown, along with awareness and usage of open educational resources (OER)
  - Our stricter measure of OER awareness, which requires awareness of the term OER as well as licensing options, has grown to 57% (up 7%) this year, with a large increase in OER as required courseware

- California exhibits a few very interesting differences from the rest of the country
  - Courses were more likely to be online, using digital textbooks
  - CA faculty report using film more (but no differences for other materials)
  - Minimal differences on overall preferences for print or digital as learning tools for students, but there is a difference for preferences on the print to digital continuum
  - CA uses more OER, and has a higher level of OER and OER initiative awareness



# WHAT DOES THIS MEAN FOR OER?

## Positive News

- OER awareness and growth continue to grow – *But can it keep going?*
- Growing faculty acceptance of digital materials
- OER continues to have highest curriculum ratings of all publishers

## The OER “Gap”

- Not all OER users are aware of OER
- Not all people who are aware use OER
- Awareness of initiatives and OER varies

## Bad News

- Return to face-to-face reduces need for digital curriculum
- Increasing competition for OER
  - Commercial publishers offering digital curriculum
  - Increasing use and awareness of Inclusive Access



# Q&A THANK YOU!

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# APPENDIX



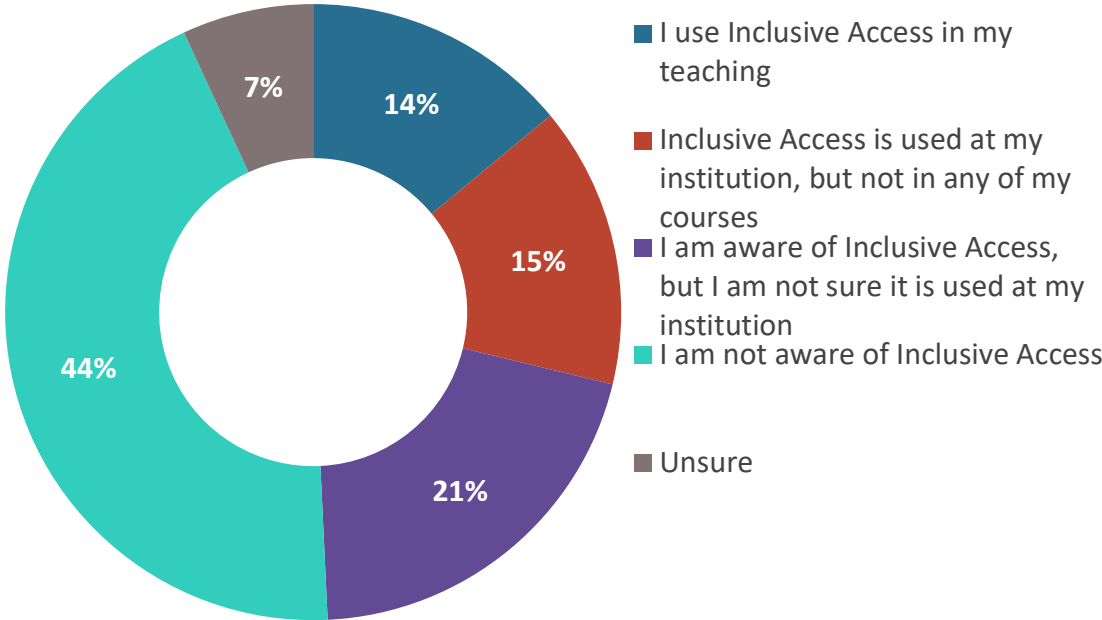
# CURRICULA MATERIALS

	California	Midwest	Northeast	South	West	National
Textbook(s) print Required	44.77%	47.89%	46.07%	46.06%	37.08%	45.09%
Textbook(s) digital Required	58.01%	42.53%	41.15%	48.47%	40.33%	47.50%
Inclusive Access subscription Required	19.76%	18.48%	10.40%	24.33%	15.65%	18.87%
Articles/Case studies Required	53.40%	52.07%	50.21%	46.32%	44.52%	49.46%
Online homework system Required	67.75%	69.69%	64.57%	64.16%	68.02%	66.46%
Video/Film Required	47.08%	43.53%	38.24%	31.85%	44.08%	39.93%
Software Required	32.39%	28.00%	30.28%	30.61%	28.08%	30.24%
Other	31.16%	30.98%	26.11%	27.66%	25.20%	28.42%
	<b>Difference from National</b>					
	California	Midwest	Northeast	South	West	
Textbook(s) print Required	-0.32%	2.80%	0.98%	0.97%	-8.01%	
Textbook(s) digital Required	10.51%	-4.97%	-6.35%	0.97%	-7.17%	
Inclusive Access subscription Required	0.89%	-0.39%	-8.48%	5.46%	-3.22%	
Articles/Case studies Required	3.94%	2.61%	0.75%	-3.14%	-4.94%	
Online homework system Required	1.29%	3.22%	-1.90%	-2.30%	1.56%	
Video/Film Required	7.15%	3.61%	-1.69%	-8.07%	4.15%	
Software Required	2.16%	-2.24%	0.04%	0.37%	-2.15%	
Other	2.74%	2.56%	-2.31%	-0.76%	-3.22%	

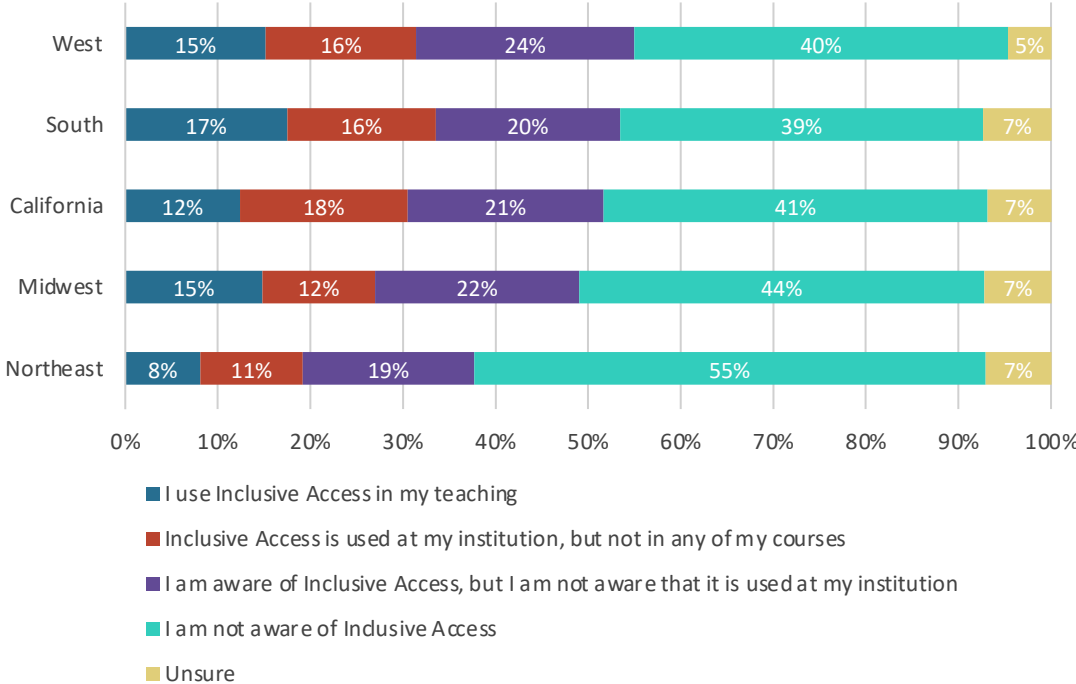


# INCLUSIVE ACCESS

Faculty: Inclusive Access Awareness

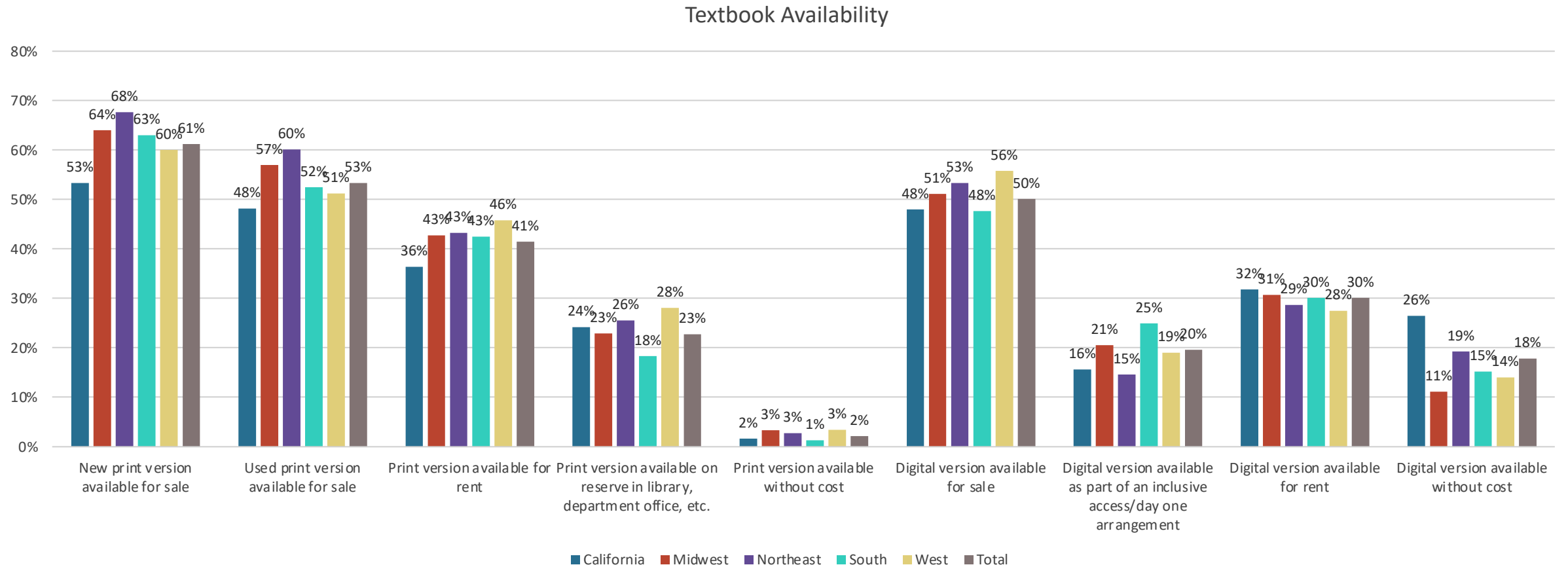


Inclusive Access



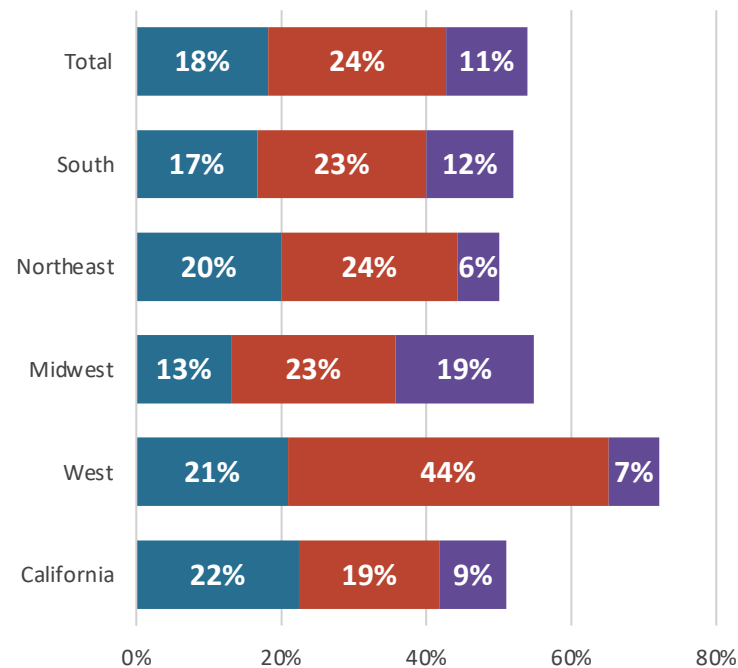


# TEXTBOOK AVAILABILITY



# OER AWARENESS BY PUBLISHER & REGION

### OER Awareness for Big Three by Region



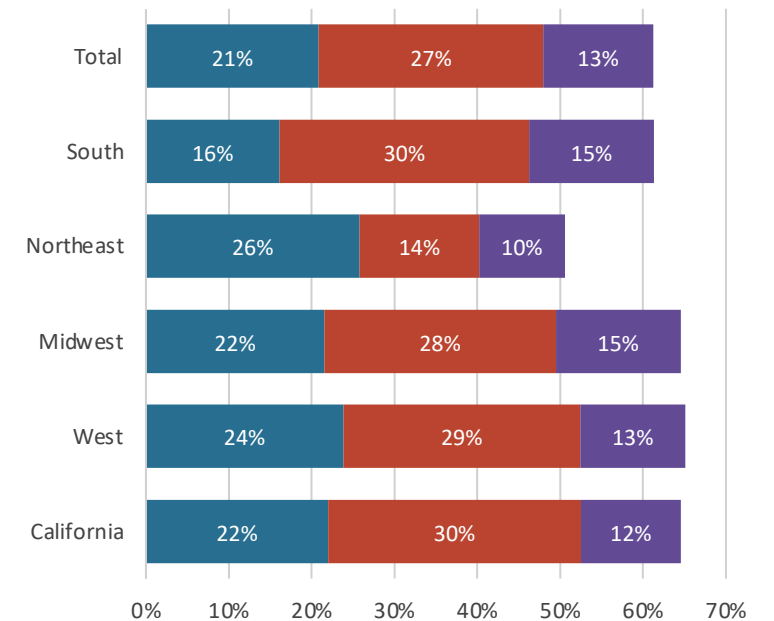
- I am very aware of OER and know how they can be used in the classroom
- I am aware of OER and some of their use cases
- I am somewhat aware of OER but I am not sure how they can be used

### OER Awareness for OER Publisher by Region



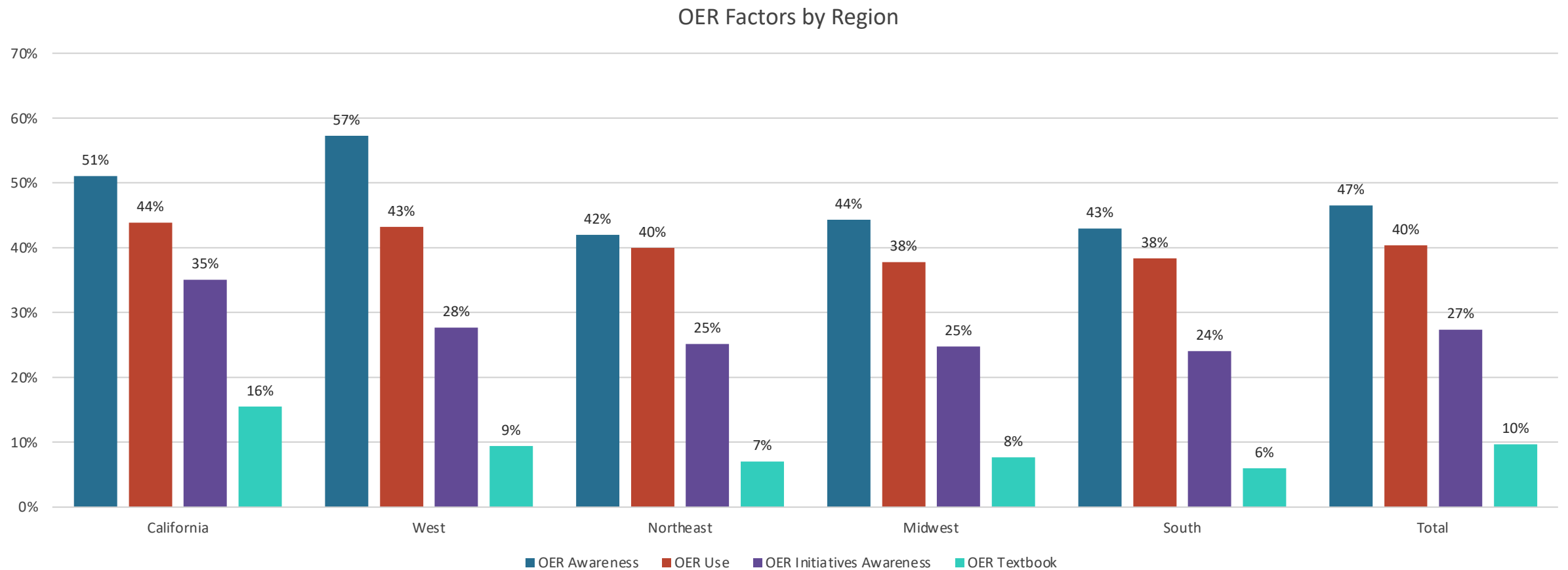
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### OER Awareness for Other Publisher by Region

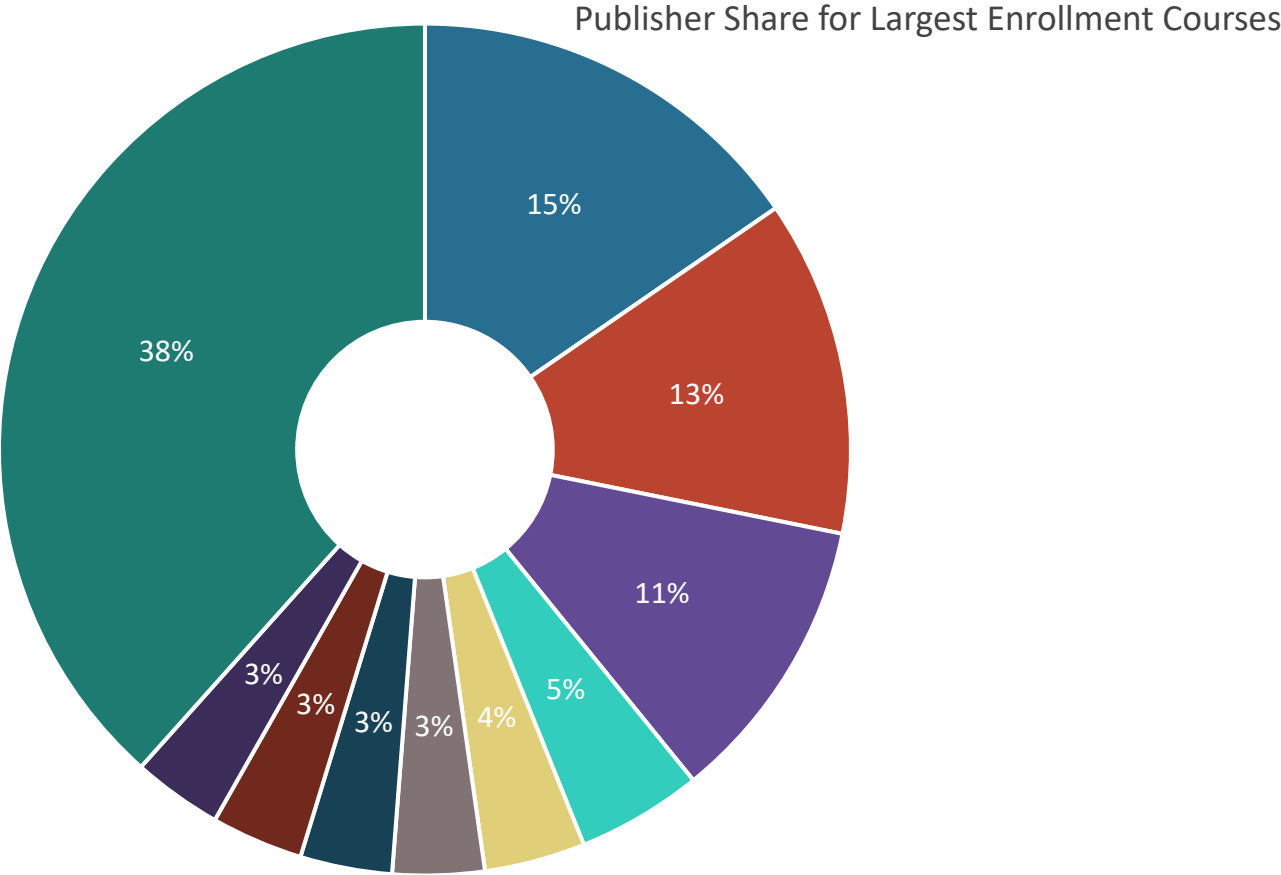


- I am very aware of OER and know how they can be used in the classroom
- I am aware of OER and some of their use cases
- I am somewhat aware of OER but I am not sure how they can be used

# OER FACTORS BY REGION



# PUBLISHER SHARE



- Pearson Education
- McGraw-Hill Education
- Cengage Learning
- Norton
- OpenStax
- Oxford University Press
- SAGE Publications
- Wiley
- Macmillan Learning
- Other

# OER AWARENESS, INITIATIVE AWARENESS, AND OER USE BY REGION

Overlap of Awareness and Use

