



Bay View Analytics

Research Brief:

Open Educational Resources: Becoming Mainstream

Julia E. Seman and Jeff Seaman

01000100011010010110011101101001011101000110000101101100001000
0001000110011000010110001101110101011011000111010001111001 /
01000100011010010110011101101001011101000110000101101100001000
0001000110011000010110001101110101011011000111010001111001

Research Brief

Open Educational Resources: Becoming Mainstream

Julia E. Seaman, Ph.D.

Research Director, Bay View Analytics

Jeff Seaman, Ph.D.

Director, Bay View Analytics

2022



Bay View Analytics

Executive Summary

Bay View Analytics has been tracking awareness, adoption, use, and attitudes toward open educational resources in U.S. Higher Education since 2009. A lot has changed.

- OER Awareness amongst US. Higher Education faculty and administrators went from almost nonexistent in 2009, to 57% “Somewhat Aware,” “Aware,” or “Very Aware” in 2022
- The number of respondents who use OER materials as required courseware lags behind the metric for OER Awareness, but these levels also grew year over year
- OpenStax has become a viable alternative to commercial publishers
- Faculty give OER materials higher marks for quality than they do for commercial alternatives

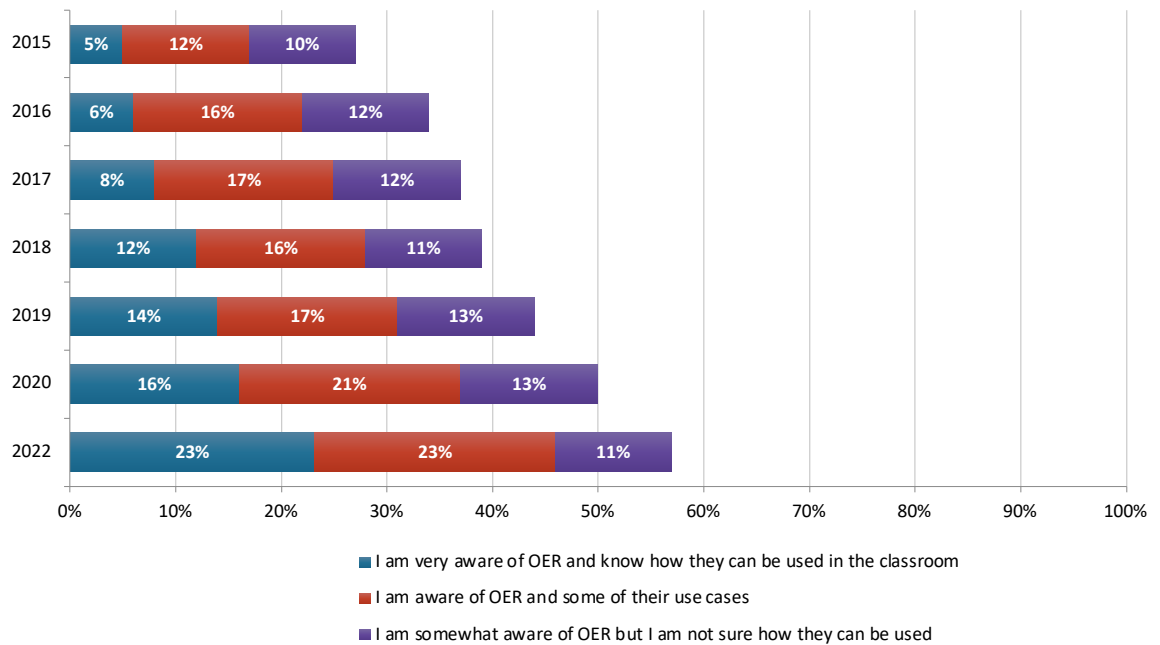
Awareness

The level of open educational resources (OER) awareness in 2009 was almost nonexistent. We could safely conclude that it was “very, very low,” but not exactly how low. A major issue was that faculty could not reliably report on their own awareness. There was so much confusion about the words and term, especially “open.” We found that faculty and administrators often confused OER with “free,” “open source,” or independently created materials.

Our first reliable measure of the level of OER awareness among faculty was in 2015. Even here, however, there remained confusion about the terms for a single awareness question. To create a reliable metric, we implemented a stricter measure that required a combined understanding of licensing terms as well as the term “open educational resources.” In 2015, 17% of faculty were “aware” or “very aware” of OER using this strict measure.

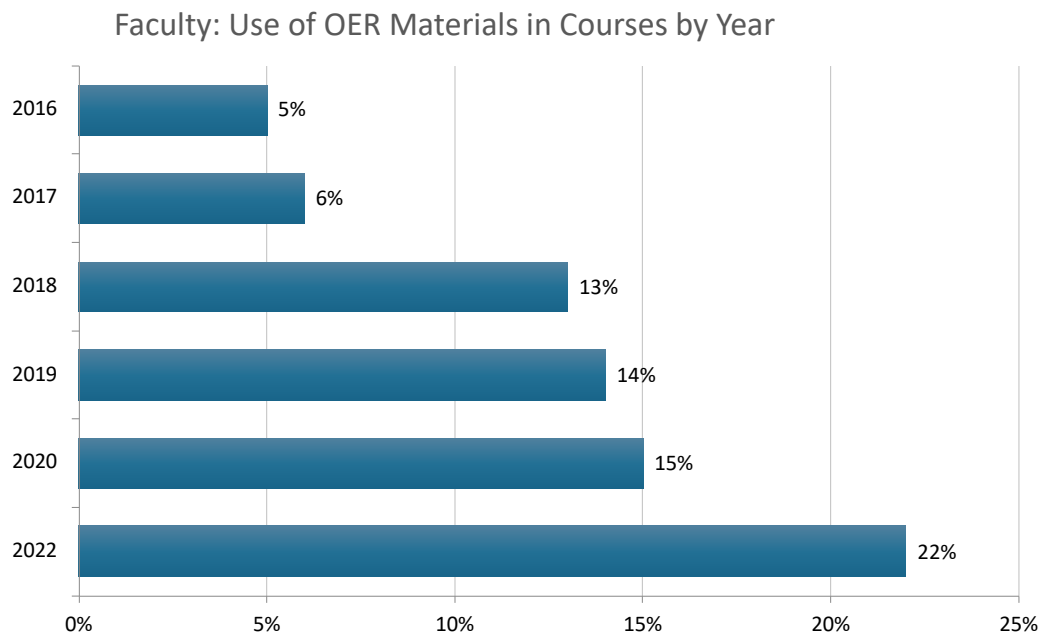
Our surveys have shown increasing levels of OER awareness every year. The most current data (2022) show 46% of faculty “Aware” or “Very aware,” with another 11% saying that they are “Somewhat Aware,” which typically means they have heard the term but don’t know anything else about it. While the latest data represents a massive improvement, it still means that nearly one-half of faculty remain unaware of OER.

Faculty: OER Awareness (Strict) by Year



Use

While important, awareness of OER does not necessarily mean faculty are using it in classrooms. Much like the pattern we saw for OER awareness, the level of use of OER in 2009 was too low to be reliably measured. It wasn't until 2016 that we felt sufficient confidence in a measure of faculty-reported OER use to publish the results. At that point, 5% of faculty said they were using OER in their courses as required materials. That figure has quadrupled to 22% in 2022.



The results show substantial growth in OER adoption in only a few years. Interestingly, the use of OER as a required material is almost identical to the rates of faculty responding they are “very aware” of OER. However, the results also highlight that most faculty are not using OER materials in their teaching, despite more being aware of it.

Availability

The education publishing market is extremely fragmented. There are three major publishers (Cengage, McGraw-Hill, and Pearson), but together they make up less than half of the market. Many smaller publishers supply the rest, each with a very small (typically a low single digit percentage) fraction of the market. For example, in 2009, no OER publisher was mentioned by faculty in our survey responses. There were a few clearing houses where faculty could go to find OER, but they had virtually no marketing or visibility.

The supply and visibility of OER materials have exploded since then. The most impactful OER publisher has been OpenStax. OpenStax is now a genuine rival to the “Big Three” commercial publishers, especially for large-enrollment introductory-level courses. Depending on the discipline area, OpenStax is the fourth or fifth most-mentioned required textbook publisher by faculty members teaching these large-enrollment introductory-level courses, ahead of all other commercial publishers.

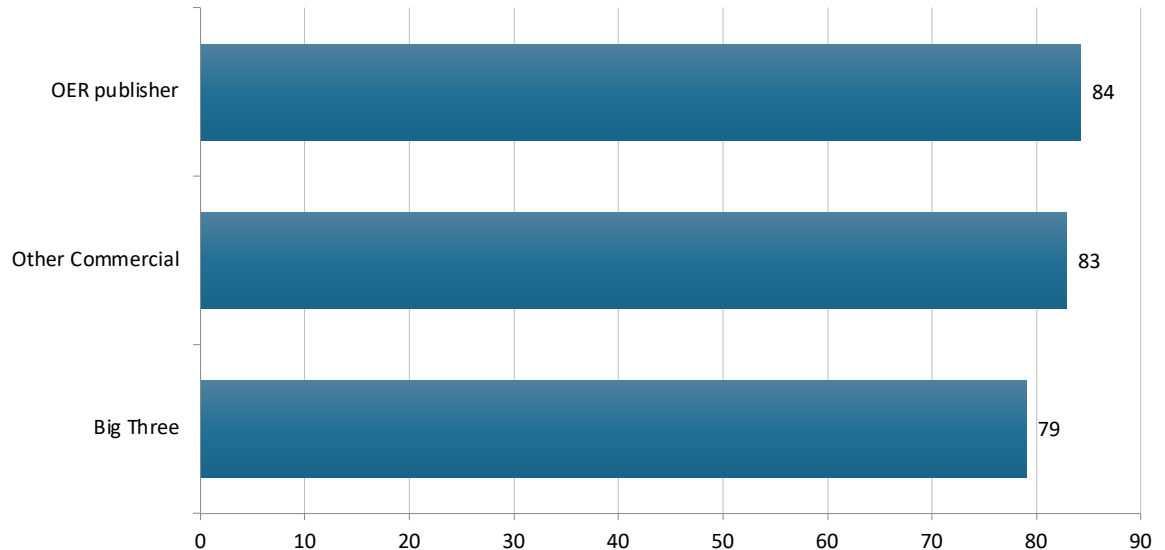
OpenStax, while the leader in OER, is not the only source of OER materials that faculty are aware of and have used. Other OER providers, such as the OER Commons and the Open Textbook Library, now show up in numbers similar to many of the smaller commercial publishers.

Quality

Our surveys – from our earliest, to comments from this year – showed considerable suspicion about the quality of OER materials among faculty and academic administrators. The general refrain was, “How can it be any good if it’s free?” However, the ratings that faculty give their required materials is now higher for OER than it is from commercial publishers. Faculty provide higher overall rating for OER, and rate all specific aspects (such as coverage, accuracy, etc.) as good or better than commercial alternatives. The only area where OER lag behind commercial materials is in rating the quality of supporting supplemental materials. As expected, however, OER rank much better on cost.

The data on quality ranking has been consistent for several years: OER is rated as good or better than commercial alternatives. However, this does not mean that the *perception* of quality has changed. Since only a fraction of faculty are using OER, most do not have any direct experience to alter the bias they may still hold.

Faculty: Overall Average Course Curriculum Rating by Publisher



Adoption Tactics

In addition to tracking the awareness and adoption process, Bay View Analytics has also examined which approaches have been the most successful in building OER awareness and adoption.

Not all faculty are equally likely to consider OER. Faculty who are the most likely to consider OER are those who are teaching online (typically because they are more aware and appreciative of digital resources), those most concerned with the cost of materials for their students, and those who are making major changes to their course content. Those least likely to consider OER are those who value supplemental materials, those who think students learn better from print than digital, and those who teach only face-to-face courses.

For all the differences in willingness to consider OER, one factor has shown itself to be very powerful across all groups of faculty. Faculty who are aware of an OER initiative (from their department, school, or system) are three to four times as likely to be aware of OER, and three to four times as likely to adopt OER in one of their courses.

What comes next?

Will the steady growth in OER awareness and adoption continue? Many factors suggest as much. Many more faculty now have experience with teaching online. Faculty attitudes towards digital materials are changing, and for the better. The array of high-quality OER materials continues to grow. Many institutions now understand that a key deterrent is a lack of knowledge, and an OER initiative can be a tool to address this.

On the other hand, commercial publishers still have far superior marketing and publicity arms, and have made major changes to their distribution process to embrace digital and subscription approaches (including “inclusive access” models). At the same time, faculty are just as likely to retain, reuse, revise, remix, and redistribute commercial products as they are with OER, even though these activities are sometimes elevated as unique benefits of OER use.

Bay View Analytics is eager to continue to explore this question.

For more information on the surveys and project, please see our [full reports](#). Many findings from our reports are also available in our [previous conference presentations](#).