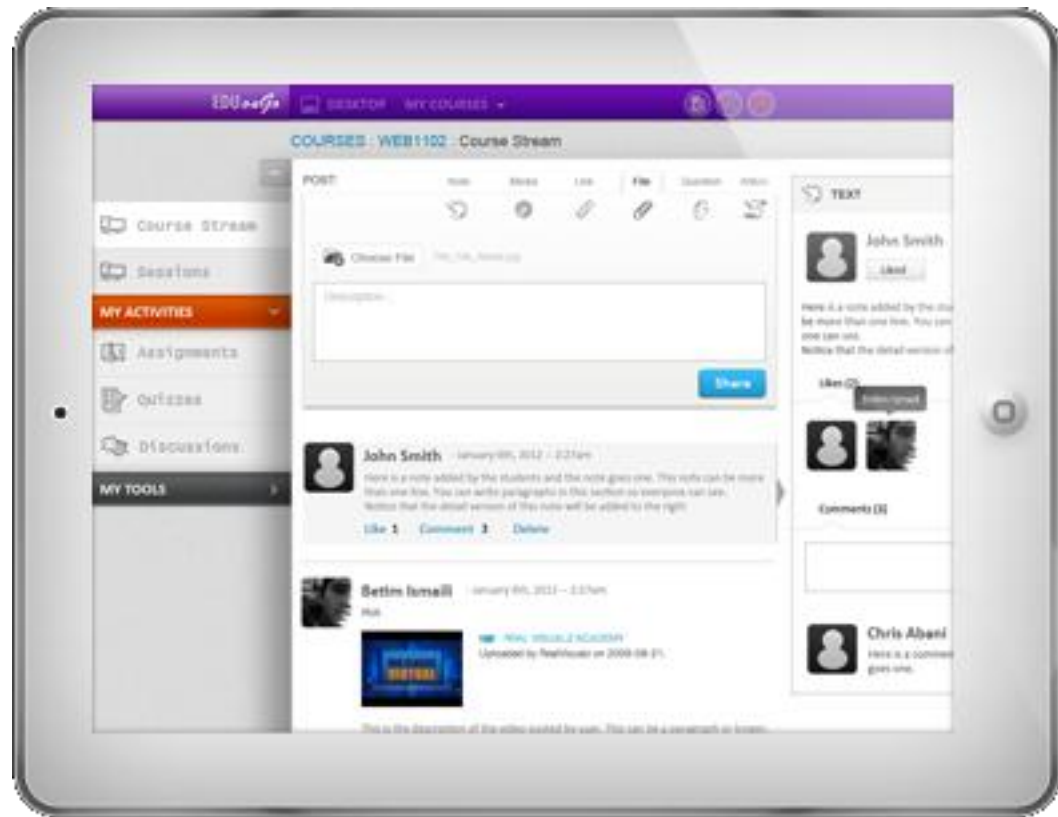


# Learning Management System Usage in Arab Higher Education Survey



Public Sector

Social Sector

Corporate Responsibility

# Table Of Contents

- Methodology and Sample Profile
- Managerial Summary
- Detailed Findings
  - Learning Management System Awareness and Use
  - Learning Management System Interaction and Satisfaction

# Carried out in 2012, the Learning Management System Usage in Arab Higher Education Survey provides an understanding of usage patterns at Arab public and private institutions

## Learning Management System Usage in Arab Higher Education Survey

<b>Total Sample</b>	Survey invitations were sent to over 10,000 individuals. The response rate was about 2.5%
<b>Focus Areas</b>	The 22 countries in the Arab World
<b>Sample Selct.</b>	Respondents were randomly selected based on publically available contact details
<b>Date of Survey</b>	September to December 2012
<b>Types of Inst.</b>	Both public and private higher education institutions were included in the sample frame
<b>Primary Resp.</b>	The primary respondent groups targeted were university professors and administrators
<b>LMS Coverage</b>	All commercially available learning management systems widely available in the region and globally
<b>Participation</b>	Participation was voluntary and anonymous
<b>Deployment</b>	The survey was deployed in an online format in English and Arabic

## Survey Reach



The survey reached 17 countries in the Arab World; We did not receive responses from Mauritania, Comoros, Somalia, Tunisia, and Djibouti

## Research Objectives

- ✓ Determine the use of software or internet-based technologies that provides instructors with tools to create and deliver content, monitor student participation, and assess student performance; such technologies are referred to as Learning Management Systems (LMS)
- ✓ Understand whether current LMS systems meet the needs of Arab educators
- ✓ Gauge satisfaction with current LMS functionalities
- ✓ Define potential areas for further regionalizing LMS systems
- ✓ Identify key stakeholders involved in institutional decisions to adopt LMS systems

# The survey covered four primary areas of inquiry to determine awareness, usage, satisfaction, and influences on institutional adoption of LMS systems

1

## LMS Awareness

### Module Objective

Included in current report

Determine awareness and usage levels of Arab higher education professors and administrators of commercially available learning management systems

### Representative Questions Posed to Respondents

- Which of the following LMS have you heard of?
- Which of the following LMS have you used?
- If you have used other LMS, which one did you prefer?
- Why have you not used an LMS system?

2

## LMS Overall Usage and Satisfaction

### Module Objective

Included in current report

Determine awareness and usage levels of Arab higher education professors and administrators of their institutional learning management system

### Representative Questions Posed to Respondents

- What % of classes are taught using LMS?
- How frequently do you use your institution's LMS?
- Where do you access it from?
- How satisfied are you with your institution's LMS?

3

## LMS Feature Usage and Satisfaction

### Module Objective

Determine specific usage of LMS functionalities and whether respondents are satisfied with current functionalities offered

### Representative Questions Posed to Respondents

- Which LMS functionalities have you used?
- Which features do you most like?
- Which feature do you dislike?
- How important are particular feature to you?

4

## Key Stakeholders in LMS Institutional Selection

### Module Objective

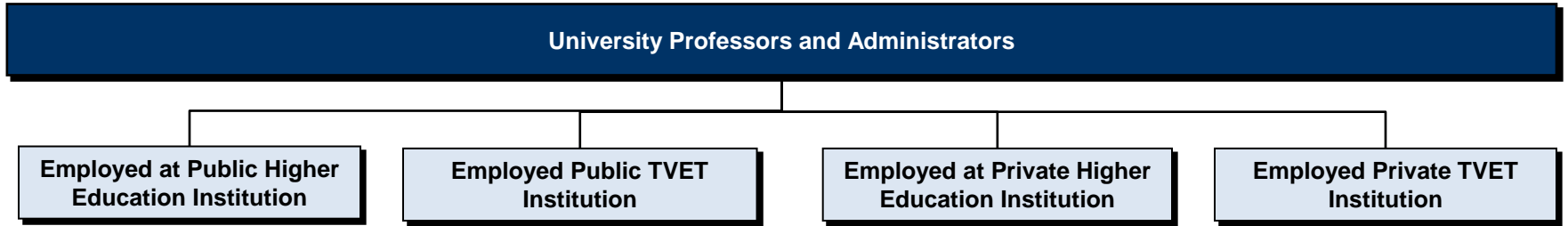
Determine which institutional stakeholders are influential in a higher education institution's decision to use a particular LMS system over other alternatives

### Representative Questions Posed to Respondents

- Who decides whether an LMS is used?
- Who makes the decision to use a particular LMS?

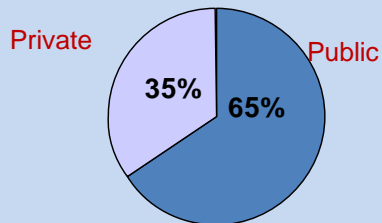
The survey sample includes higher education educators and administrators at public and private university and TVET institutions

### Basic Profile Distribution Diagram

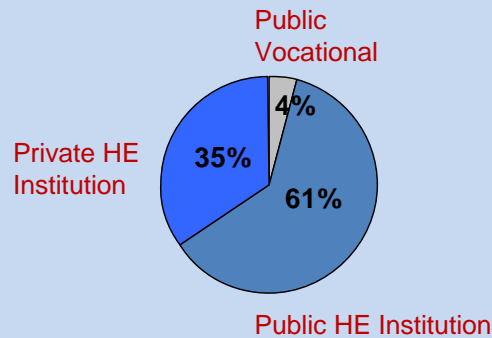


### Detailed Profile Distribution

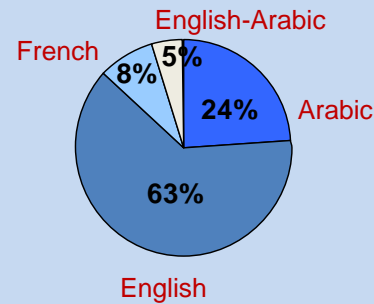
#### Public vs. Private Institution



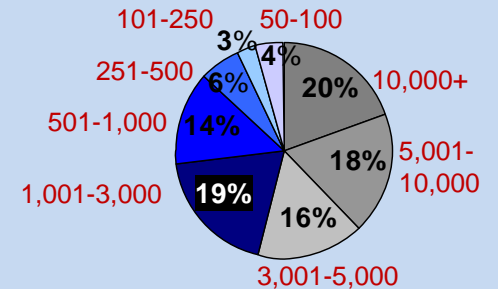
#### Type of Institution



#### Language of Institution



#### Size of Institution



# The Learning Management System Usage in Arab Higher Education Survey reveals the nascent nature of blended learning in the region

## Sample Structure

### Institution Location

<i>Location</i>	<i>Frequency</i>
Algeria	5%
Bahrain	2%
Egypt	12%
Iraq	2%
Jordan	4%
Kuwait	2%
Lebanon	4%
Libya	1%
Morocco	8%
Oman	11%
Palestine	6%
Qatar	2%
Saudi Arabia	13%
Sudan	9%
UAE	19%
Yemen	1%

### Institutional Affiliation

<i>Title</i>	<i>Frequency</i>
Administrative Support	4%
Assistant Professor	55%
Lecturer	8%
Professor	30%
Senior Administrator	3%

- 93% of survey respondents are teaching staff

### Primary Teaching Delivery Method

<i>Delivery Method</i>	<i>Frequency</i>
Hybrid or blended (some classes online, some classes face-to-face)	10%
Mostly face-to-face	89%
Online or Distance (all online or rarely face-to-face)	1%

- 89% of respondents primarily use face-to-face delivery methods
- Only 11% of respondents use blended learning approaches as opposed to 93% of higher education professors in North America

# Table Of Contents

- Methodology and Sample Profile
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  - Learning Management System Interaction and Satisfaction

# Arab educators have widely embraced LMS to complement their teaching; institutions in the Gulf which are English speaking lead the region in usage ...

## Key Findings Regarding Learning Management System Awareness and Use

1

LMS usage is more common in the GCC than elsewhere in the region with 68% of educators reporting that they use LMS

2

93% of institutions are aware of one or more LMS systems; while Blackboard and Moodle have the highest awareness and usage in the region

3

LMS usage is much more common in English and English-Arabic institutions; 70% of English speaking institutions use LMS as compared to 75% of English-Arabic institutions

4

LMS choice shows strong regional variation with the Gulf countries preferring Blackboard and North Africa preferring Moodle; 64% of LMS users in the Gulf use Blackboard while 88% of LMS users in North Africa use Moodle

5

Arab educators give several reasons for not using LMS to complement teaching; reasons range from organizational culture to lack of training and IT infrastructure

# The majority of Arab educators interact with their LMS a few times a week; Educators are generally not satisfied with their LMS ...

## Key Findings Regarding Learning Management System Interaction and Satisfaction

1

The majority of Arab educators interact with their LMS a few times a week; 24% of educators report daily interaction with their LMS

2

Educators in the Gulf and North Africa are more likely to report using their LMS system a few times a week or daily

3

Educators at institutions with 500 or more students more frequently interact with their LMS; However, interaction appears to drop off for institutions with more than 10,000 students

4

Educators in the Gulf and North Africa are more likely to access their LMS on campus, while educators in the Levant have high rates of home usage

5

Arab educators are generally not satisfied with their LMS; Lack of satisfaction is particularly high in the Levant

# Table Of Contents

- Methodology and Sample Profile
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# Universities in the GCC have higher rates of LMS usage; Private universities have higher usage rates than public universities

In the Arab World, Blackboard and Moodle have the highest awareness levels amongst commercially available LMS systems ...



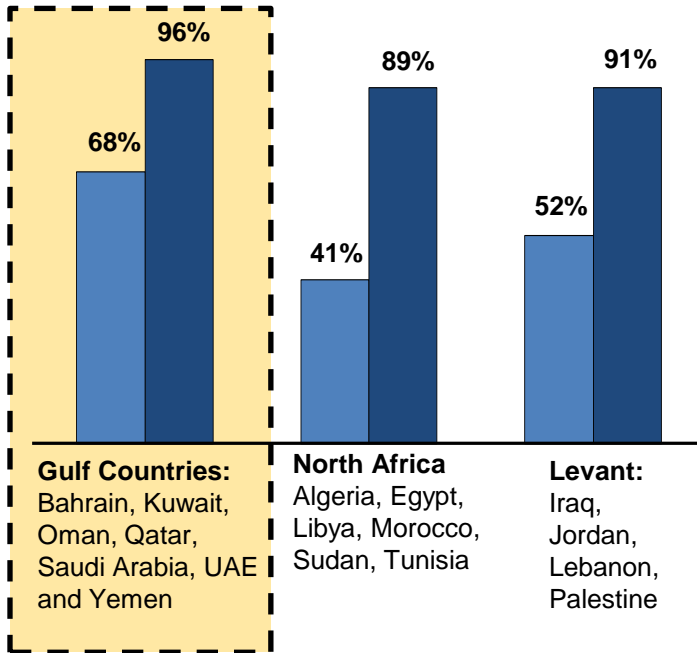
**28% awareness**



**21% awareness**

**Awareness of 1 or More LMS System and Usage by Region**

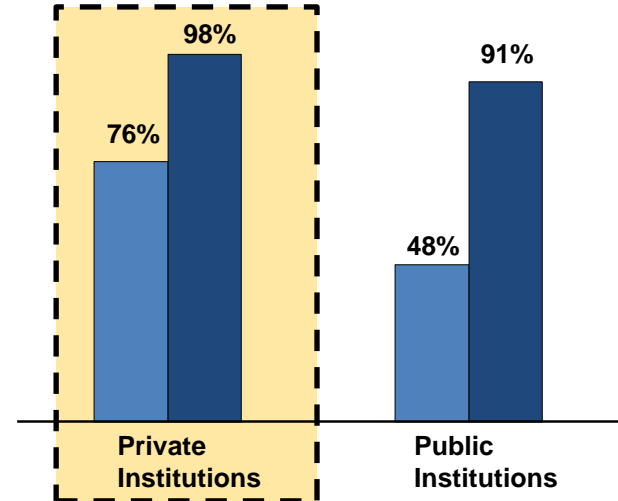
■ Awareness  
■ Usage



▪ LMS usage is more common in the GCC than elsewhere in the region

**Awareness of 1 or More LMS System and Usage by Type of Institution**

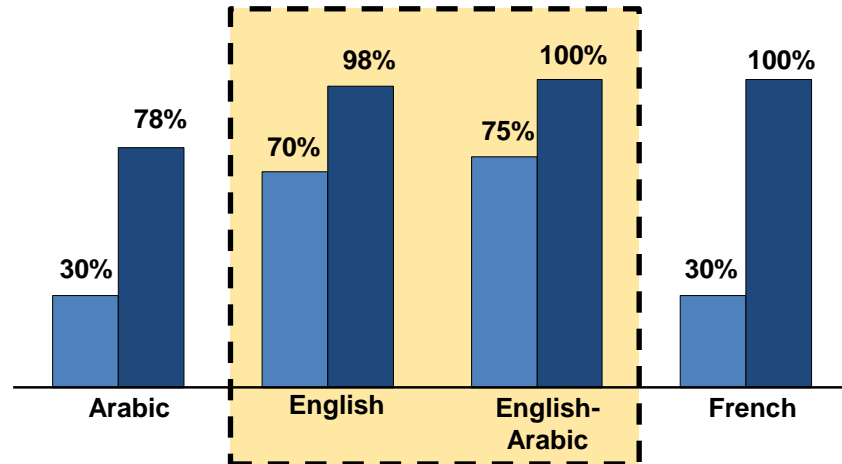
■ Awareness  
■ Usage



- Private universities have much higher rates of LMS awareness
- 93% of institutions are aware of one or more LMS system
- Amongst institutions which are not aware of LMS systems, all are public local or national universities

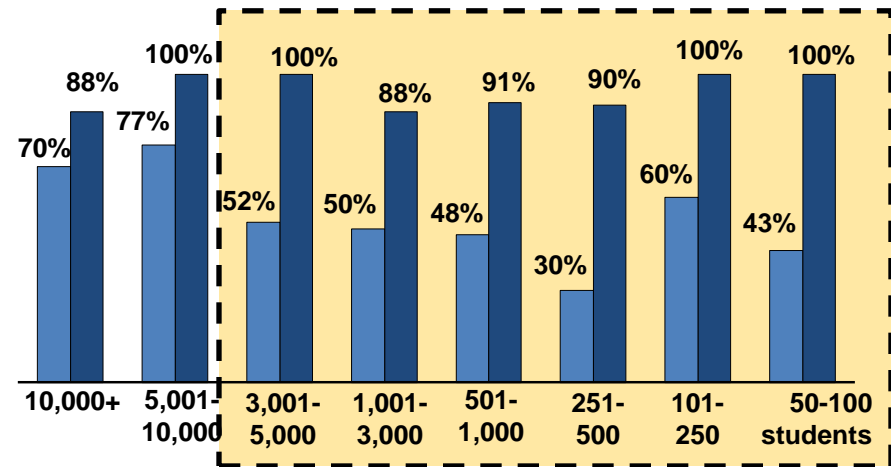
# LMS usage is much more common in English and English-Arabic institutions; institutions with fewer students have much lower LMS usage levels

**Awareness of 1 or More LMS System and Usage by Language of Institution**



- LMS usage is much more common in English and English-Arabic institutions
- A sizable percentage of Arabic institutions have no awareness of commercially available LMS systems

**Awareness of 1 or More LMS System and Usage by Institutional Size**



- Institutions with 50 to 3,000 students have much lower levels of LMS use than larger institutions

# LMS usage shows strong regional variation with the Gulf countries showing preference for Blackboard; While North African countries prefer Moodle

Of respondents who use LMSs, nearly all use Blackboard or Moodle ...



53% usage



46% usage

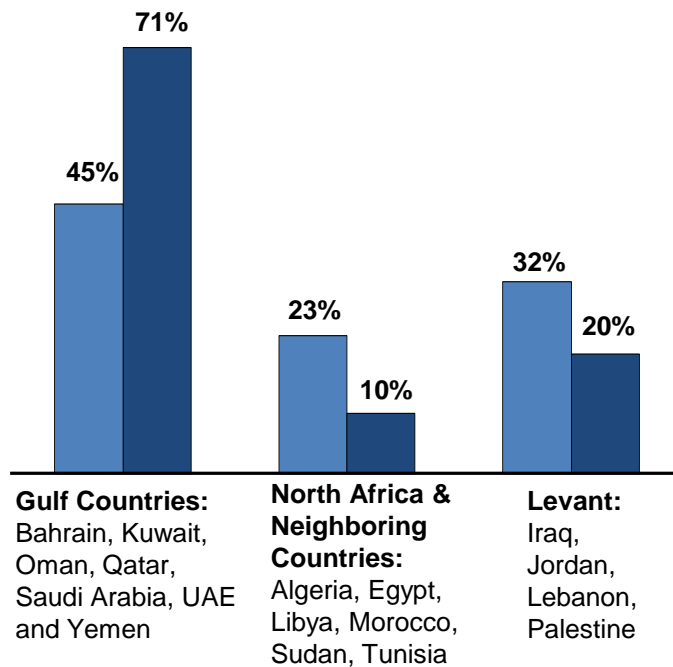
## Blackboard and Moodle Use as a % of Total LMS Use by Region

Regional Use of LMS Systems	Blackboard Users as a % of Total LMS Users	Moodle Users as a % of Total LMS Users	Users of Blackboard and Moodle as a % of Total Multiple LMS Use
<b>Gulf Countries:</b> Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates and Yemen	64%	35%	9%
<b>North Africa &amp; Neighboring Countries:</b> Algeria, Egypt, Libya, Morocco, Sudan, Tunisia	31%	88%	25%
<b>Levant:</b> Iraq, Jordan, Lebanon, Palestine	42%	42%	10%

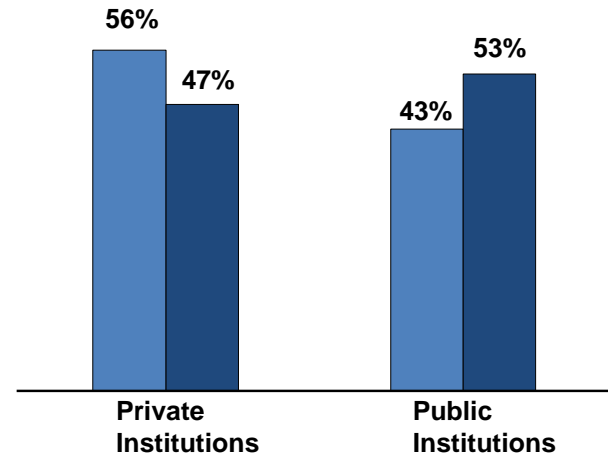
- LMS choice shows strong regional variation with the Gulf countries preferring Blackboard and North Africa preferring Moodle
- In the Levant, Blackboard and Moodle have similar usage rates

# The majority of Blackboard and Moodle use occurs in the Gulf; Moodle is more likely to be used in private institutions while public institutions have slightly higher Blackboard use

**Blackboard and Moodle Use by Region**



**Blackboard and Moodle Use by Type of Institution**



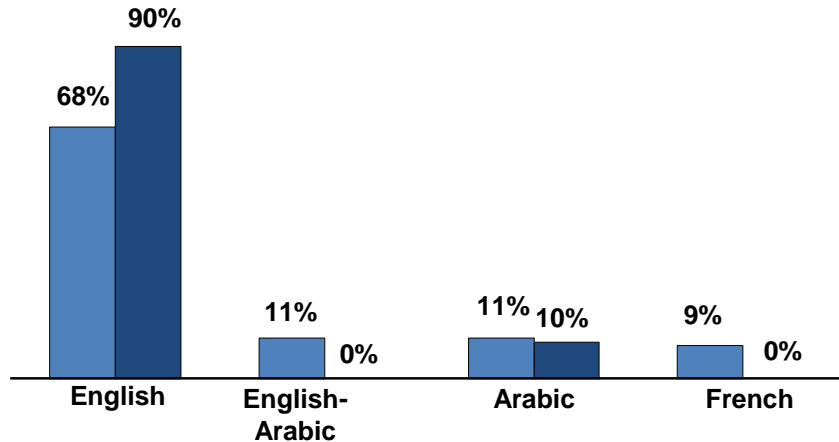
- Blackboard usage is stronger in the Gulf countries, while Moodle shows much higher use in North Africa and the Levant

- Moodle is more widely used in private institutions, while public institutions are slightly more likely to use Blackboard

# English language institutions make up the majority of Blackboard and Moodle use; institutions with below 1,000 students generally have much lower LMS usage

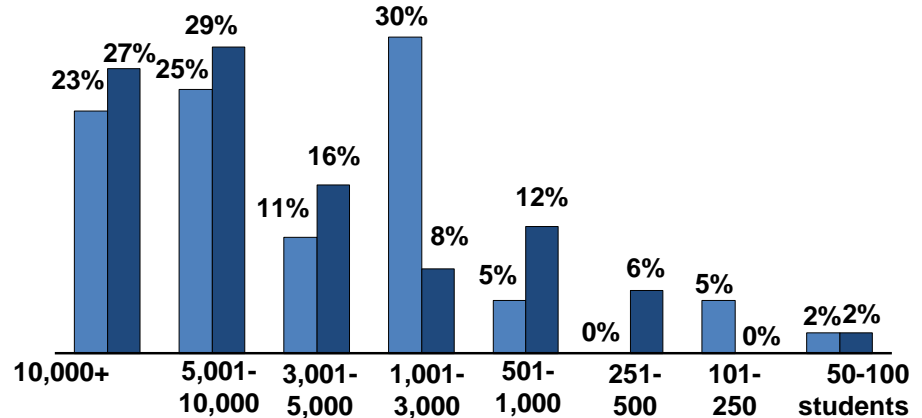
**Blackboard and Moodle use by Language of Institution**

Blackboard  
Moodle



**Blackboard and Moodle Use by Institutional Size**

Blackboard  
Moodle



- Both Blackboard and Moodle have higher penetration in institutions with English as a primary language of instruction
- Blackboard has minimal penetration in French and English-Arabic institutions
- Arabic institutions show equal preference for Blackboard and Moodle

- Institutions with 50 to 1,000 students have much lower levels of Blackboard and Moodle use than larger institutions
- Institutions with 1,000 or more students make up 89% of Moodle use compared to 80% of Blackboard use

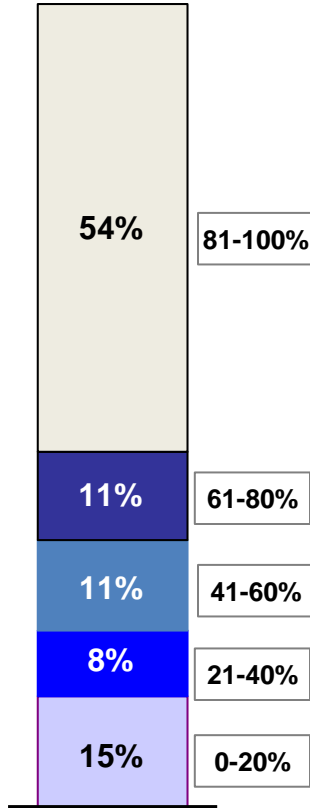
## For Arab educators, several reasons are given for not using LMS to complement teaching; reasons range from organizational culture to lack of training and IT infrastructure

### Top Reasons for Not Using LMS Systems

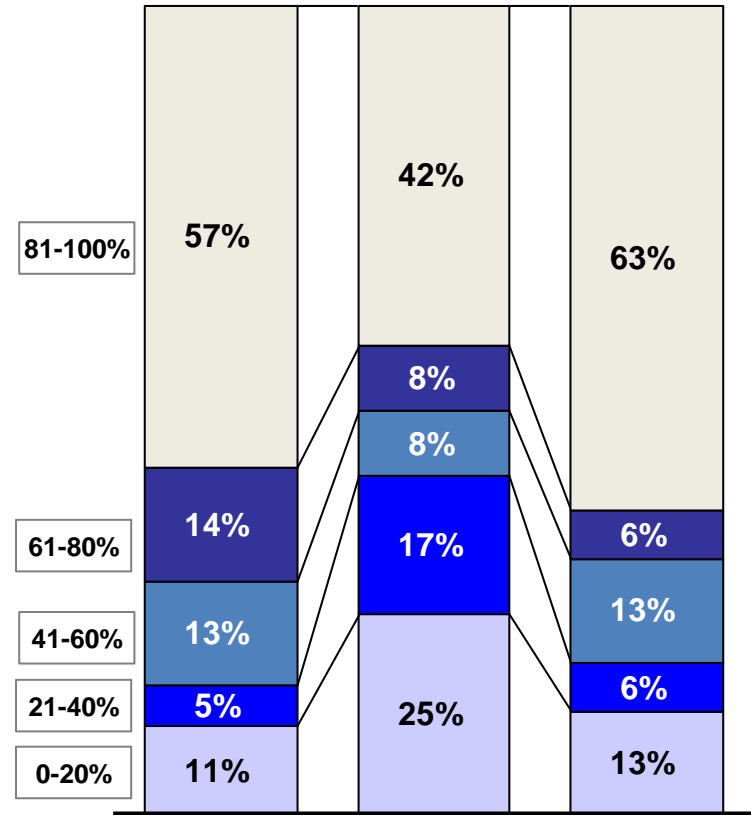
Top Reasons for Not Using LMS Systems	Number of Mentions	Main issues that may cause lack of LMS Use
Not used at institution	27%	Respondents indicate a relationship between personal use of LMS in the classroom and institutional use
No Adequate Training	22%	Respondents cite lack of training as a key barrier to the use of LMS in Arab higher education classrooms
No Infrastructure	17%	Respondents cite lack of IT infrastructure as a key barrier to LMS use
No fit with Teaching Style	9%	Given traditional regional pedagogy, many respondents cited lack of fit with teaching style
Internet speed slow	9%	In addition to inadequate IT infrastructure, slow internet speeds deter LMS usage
No Time	8%	For some respondents, LMS use is viewed as an extra job responsibility rather than complementary to teaching
Lack of information	8%	In addition to lack of training, several respondents report a lack of information on LMS as a use deterrent

# The majority of educators who use LMS utilize their systems quite frequently; educators in North Africa are more likely to infrequently use LMS to complement teaching

**% of Classes Taught Using Institutional LMS**



**% of Classes Taught Using Institutional LMS by Region**



- The majority of educators who use LMS frequently make use of it in their classes
- Educators in the Gulf and Levant have very similar classroom usage patterns
- Educators in North Africa are more likely to be infrequent users of LMS systems

**Gulf Countries:**  
Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and United Arab Emirates

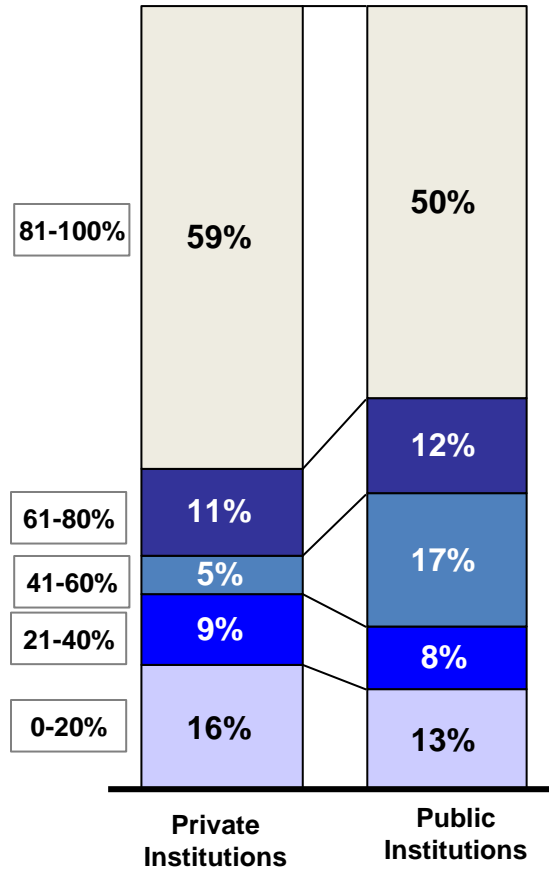
**North Africa & Neighboring Countries:**  
Algeria, Egypt, Libya, Morocco, Sudan, Tunisia, Yemen

**Levant:**  
Iraq, Jordan, Lebanon, Palestine

# Educators in public and private institutions have similar LMS usage patterns; institutions with 1,000 or more students amore frequently use LMS in the classroom

**% of Classes Taught Using Institutional LMS by Institution Type**

**% of Classes Taught Using Institutional LMS by Institution Size**

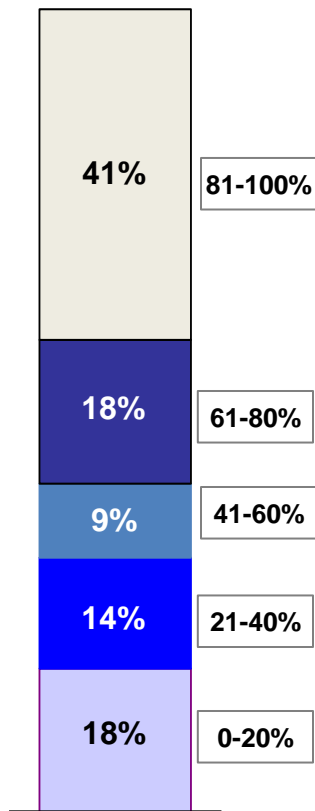


	0-20%	21-40%	41-60%	61-80%	81-100%
50 – 100 students	33%	0%	0%	0%	67%
101- 250 students	33%	0%	33%	33%	0%
251 – 500 students	33%	0%	0%	0%	67%
501 – 1,000 students	9%	9%	18%	9%	55%
1,001 – 3,000 students	17%	11%	6%	17%	50%
3,001- 5,000 students	14%	7%	0%	14%	64%
5,001 – 10,000 students	9%	9%	4%	9%	70%
10,000 + students	14%	9%	27%	9%	41%

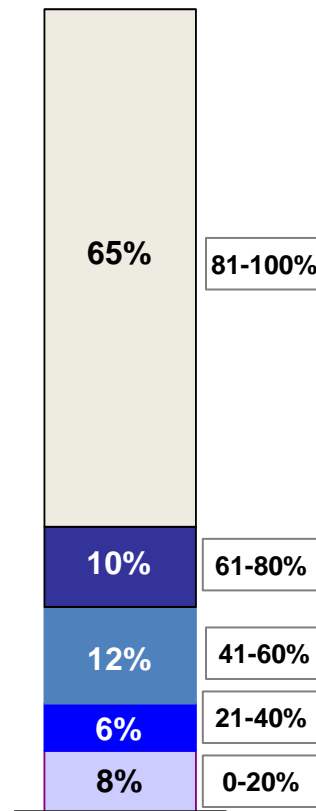
- Public and private institutions have similar usage patterns in the classroom; Slightly more educators in private institutions deploy LMS systems in their classrooms at the 81-100% level
- Institutions with 1,000 to 10,000 students tend to use LMS systems more frequently; however, once institutions have 10,000 or more students, classroom use drops off; low sampling amongst smaller institutions are indicative but not large enough to draw conclusions

# Educators who use Moodle are less likely to utilize an LMS in the classroom; Blackboard users have comparatively high use of LMS to complement their teaching

**% of Classes Taught Using LMS for Moodle Users**



**% of Classes Taught Using LMS for Blackboard Users**



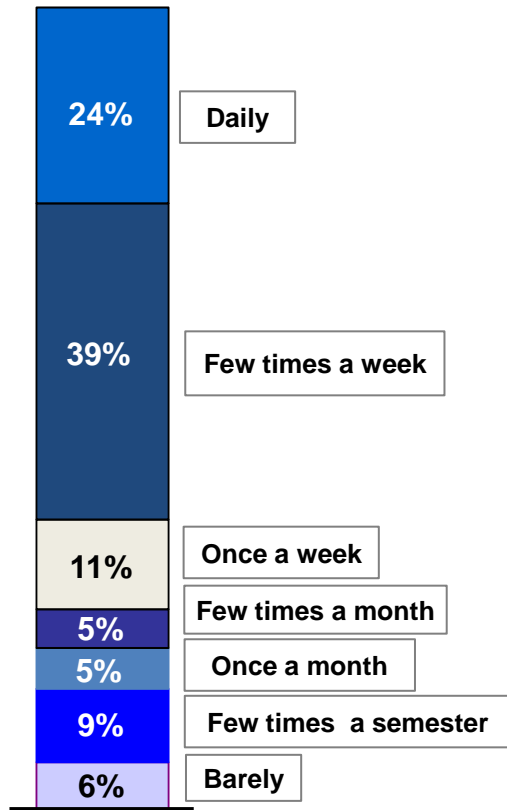
- Compared to educators who use Blackboard, Moodle users are less likely to use LMS in their classrooms
- Moodle users are also more likely to report no or very little usage of LMS in the classroom

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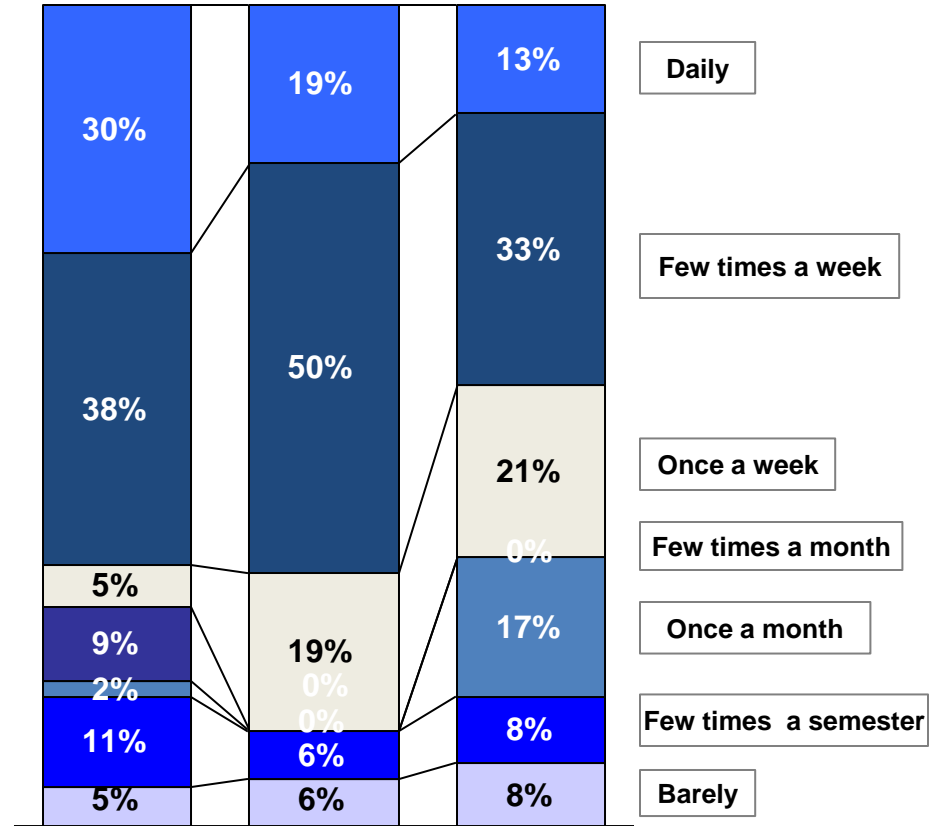
- Methodology and Sample Profile
- Managerial Summary
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  - Learning Management System Interaction and Satisfaction

# The majority of Arab educators interact with their LMS a few times a week; users of LMS in the Gulf and North Africa are more frequent users than those in the Levant

Frequency of Interaction with LMS Over the Last Semester



Frequency of Interaction with LMS Over the Last Semester by Region



- The majority of educators use their LMS a few times a week
- Educators in the Gulf and North Africa are more likely to report using their LMS system a few times a week or daily

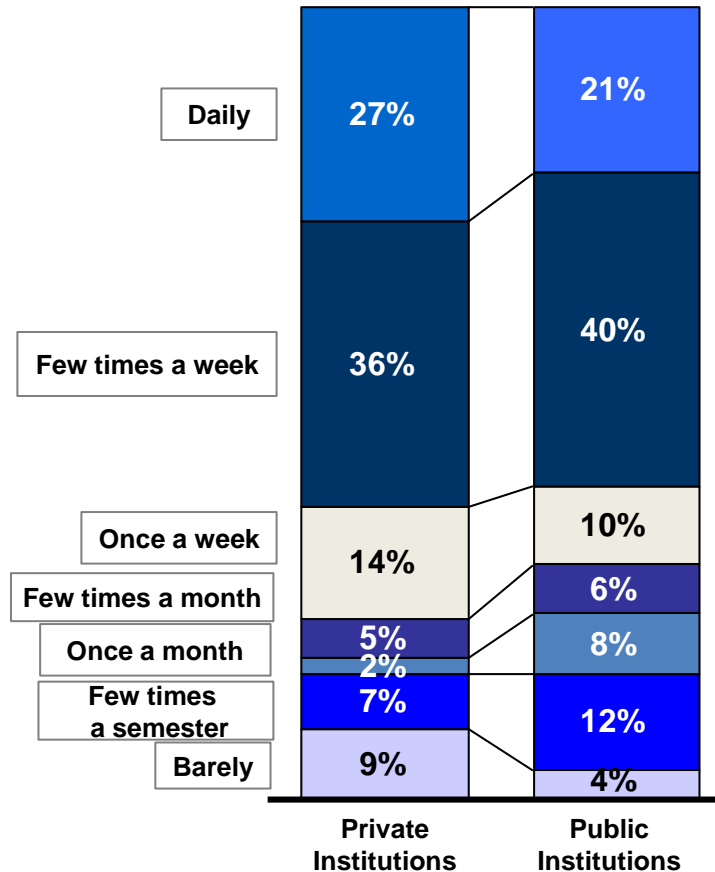
**Gulf Countries:**  
Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE and Yemen

**North Africa & Neighboring Countries:**  
Algeria, Egypt, Libya, Morocco, Sudan, Tunisia

**Levant:**  
Iraq, Jordan, Lebanon, Palestine

# Private and public institutions have similar interaction levels; public universities have slightly higher rates of educators who report infrequent LMS interaction

Frequency of Interaction with LMS Over the Last Semester by Institution Type



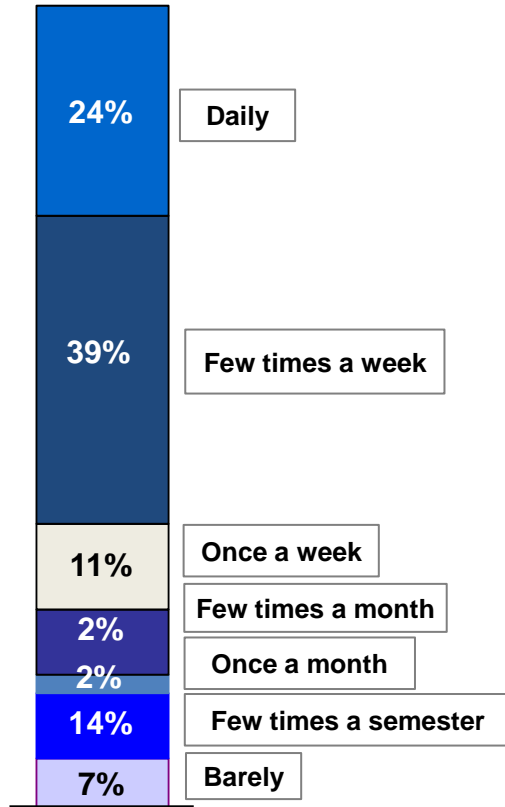
## Educators at institutions with 500 or more students more frequently interact with their LMS; however, interaction appears to drop off institutions with more than 10,000 students

**Frequency of Interaction with LMS Over the Last Semester by Institution Size**

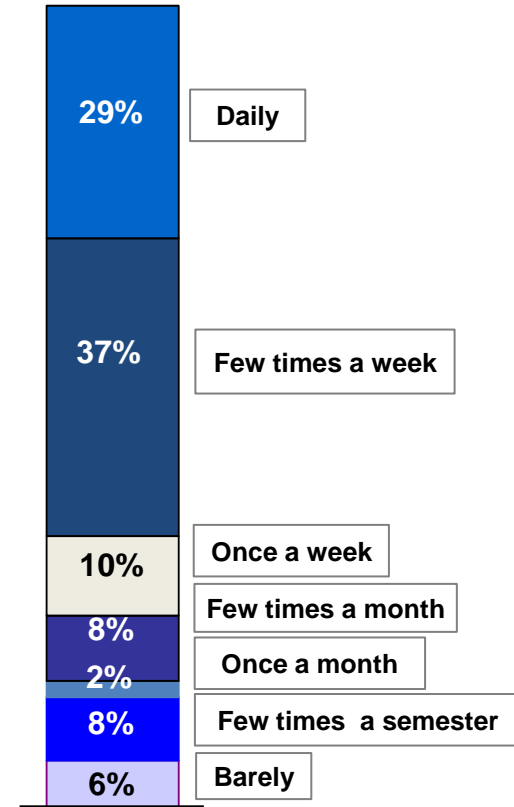
	Daily	A Few times a week	Once a week	A Few times a month	Once a month	A Few times over sem.	Barely used
50 – 100 students	0%	33%	33%	0%	0%	0%	33%
101- 250 students	0%	0%	67%	0%	0%	33%	0%
251 – 500 students	0%	33%	0%	67%	0%	0%	0%
501 – 1,000 students	27%	36%	0%	9%	18%	9%	0%
1,001 – 3,000 students	38%	25%	13%	0%	6%	13%	6%
3,001- 5,000 students	21%	57%	0%	0%	0%	7%	14%
5,001 – 10,000 students	22%	57%	9%	4%	0%	4%	4%
10,000 + students	26%	26%	17%	4%	9%	13%	4%

# Compared to educators who use Blackboard, Moodle users have slightly lower frequency of LMS interaction

Frequency of Interaction with LMS Over the Last Semester for Moodle Users



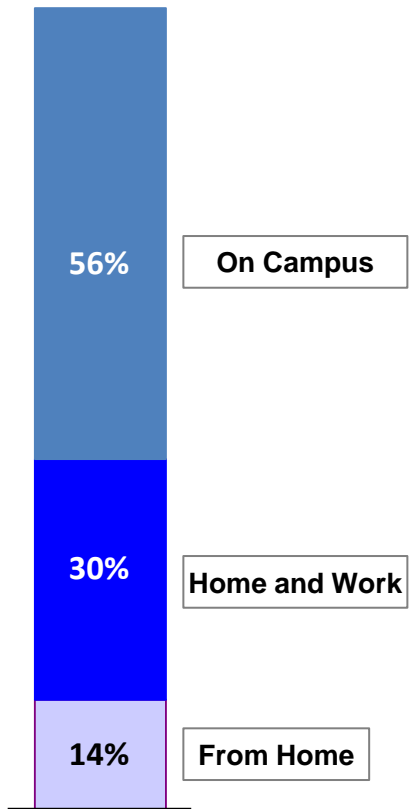
Frequency of Interaction with LMS Over the Last Semester for Blackboard Users



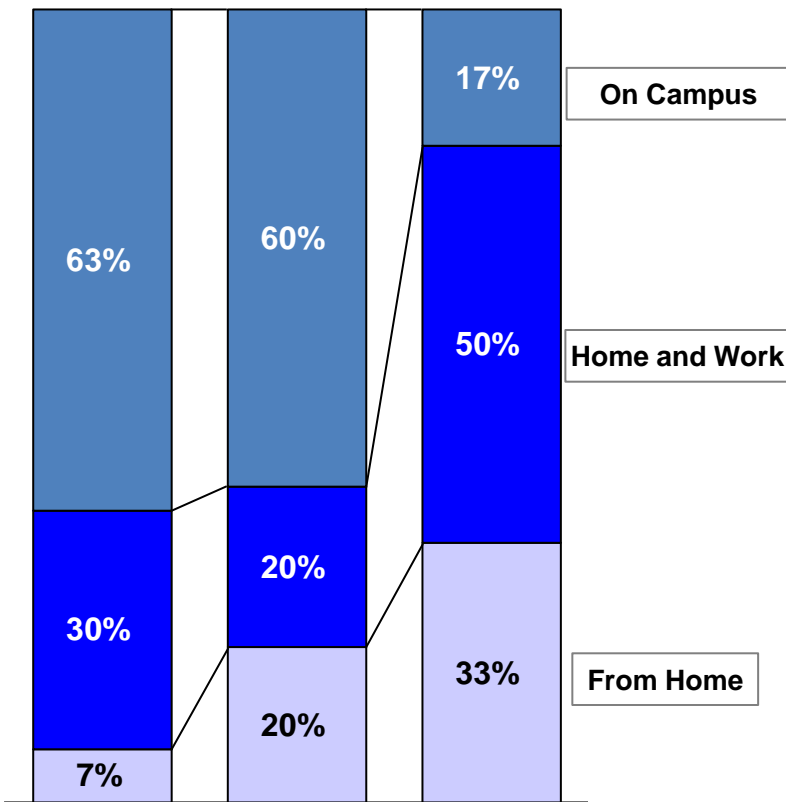
- Compared to educators who use Blackboard, Moodle users have slightly lower frequency of LMS interaction
- Moodle users are also more likely to report little to no LMS interaction

# Educators in the Gulf and North Africa are more likely to access their LMS on campus, while educators in the Levant have high rates of home usage

Access Location



Access Location by Region

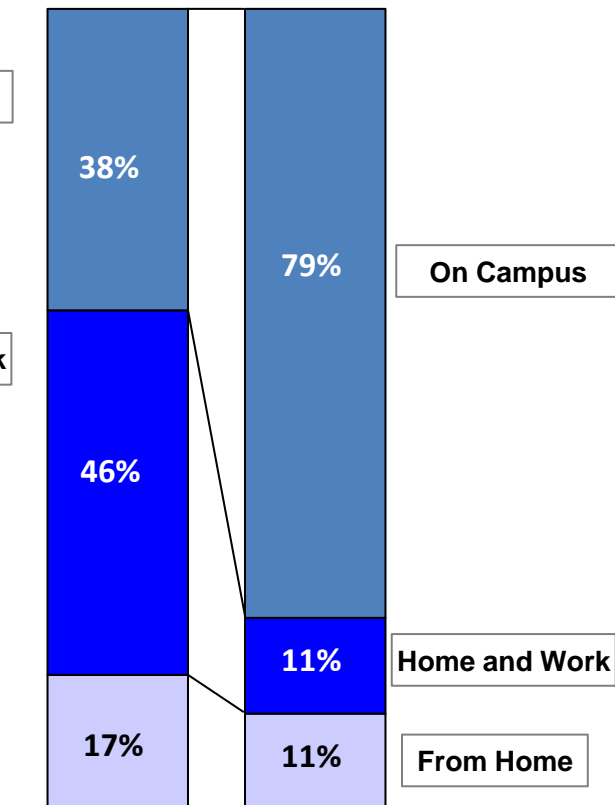


**Gulf Countries:**  
Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE and Yemen

**North Africa & Neighboring Countries:**  
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**Levant:**  
Iraq, Jordan, Lebanon, Palestine

Access Location by Institution Type

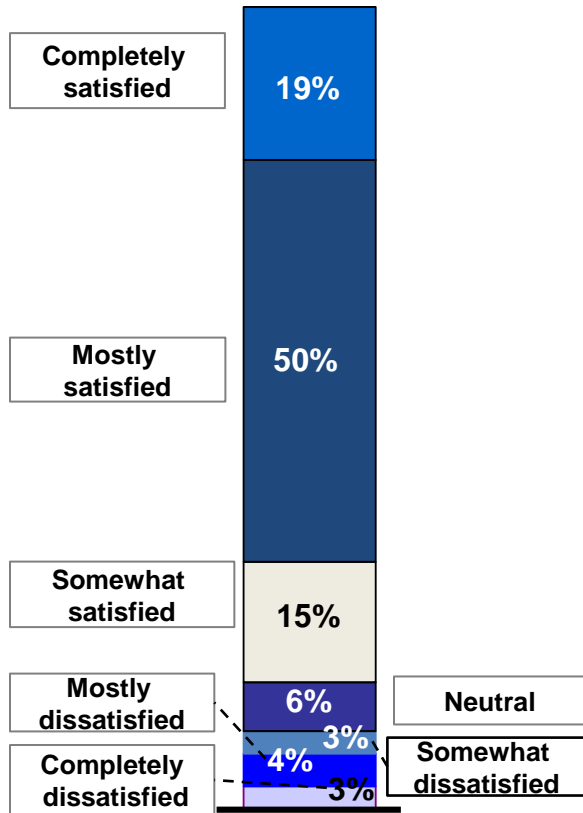


**Private Institutions**

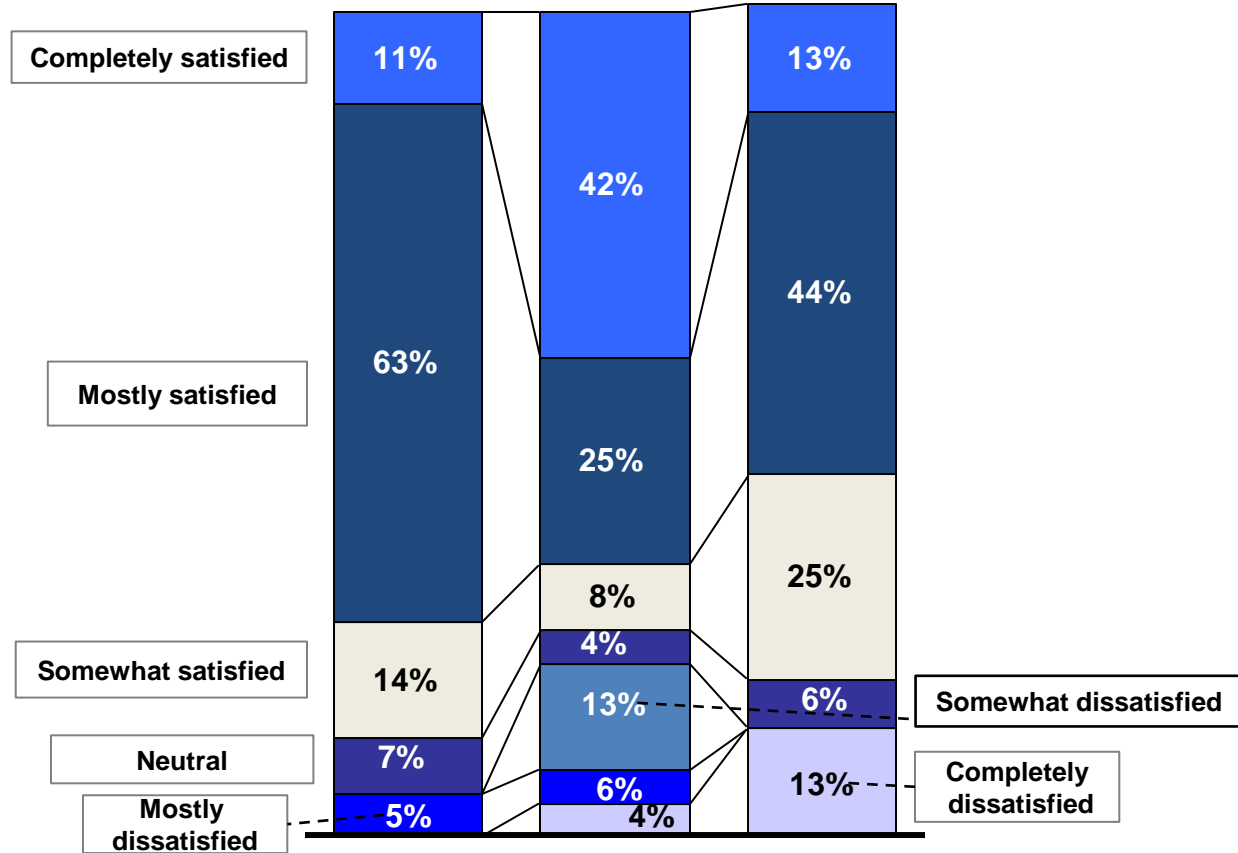
**Public Institutions**

# Educators in North Africa display higher satisfaction rates with the LMS they currently use than in the Gulf countries and the Levant

## Satisfaction With Current LMS



## Satisfaction with Current with LMS by Region



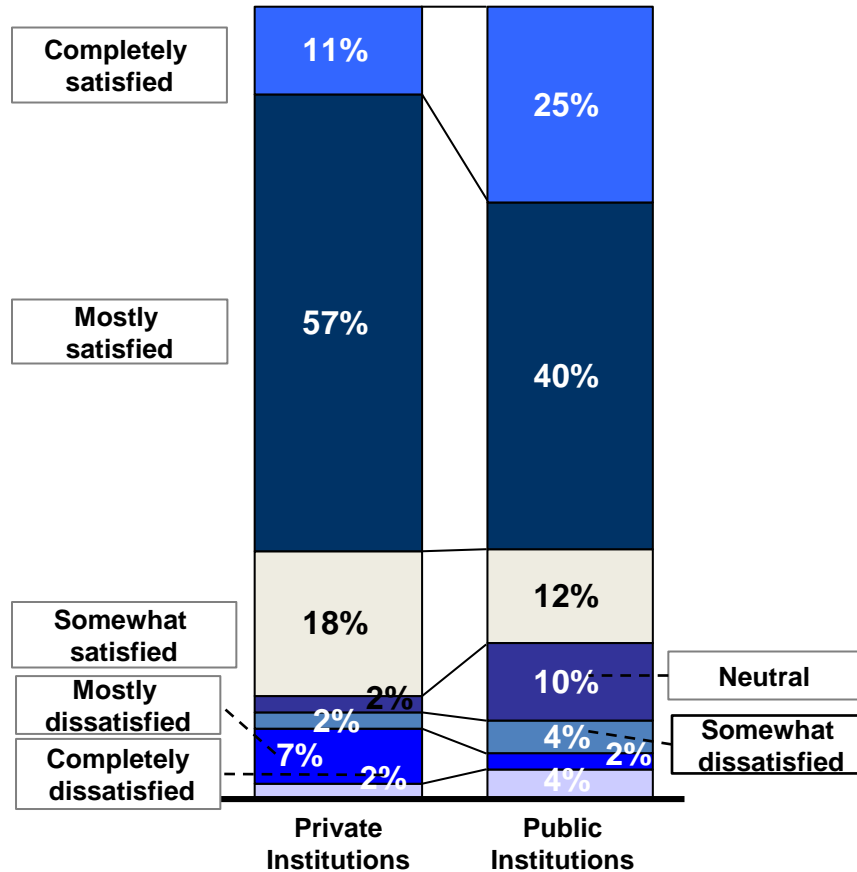
**Gulf Countries:**  
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Saudi Arabia, UAE  
and Yemen

**North Africa &  
Neighboring  
Countries:**  
Algeria, Egypt,  
Libya, Morocco,  
Sudan, Tunisia

**Levant:**  
Iraq,  
Jordan,  
Lebanon,  
Palestine

# Despite displaying similar levels of satisfaction to private institution users, educators in public institutions show higher levels of complete satisfaction

Satisfaction with Current with LMS by Institution Type



# Arab educators in larger institutions are more satisfied with their LMS

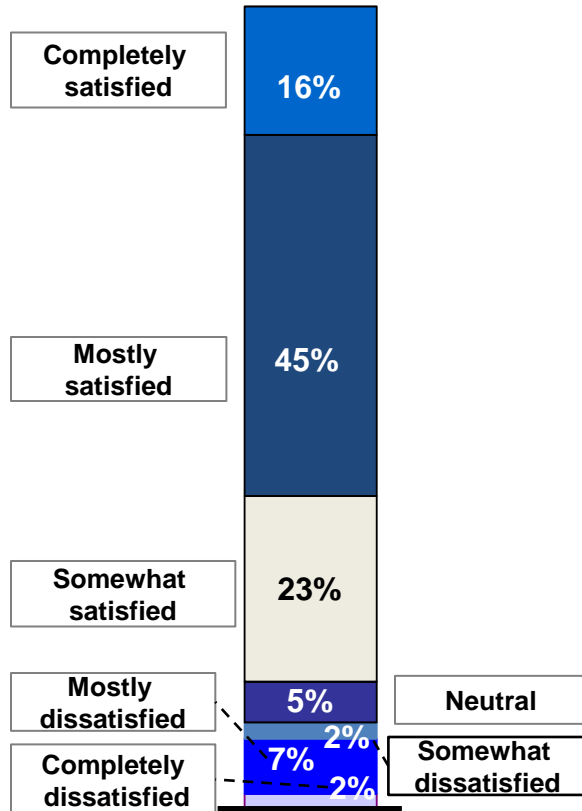
## Satisfaction with Current with LMS by Institution Size

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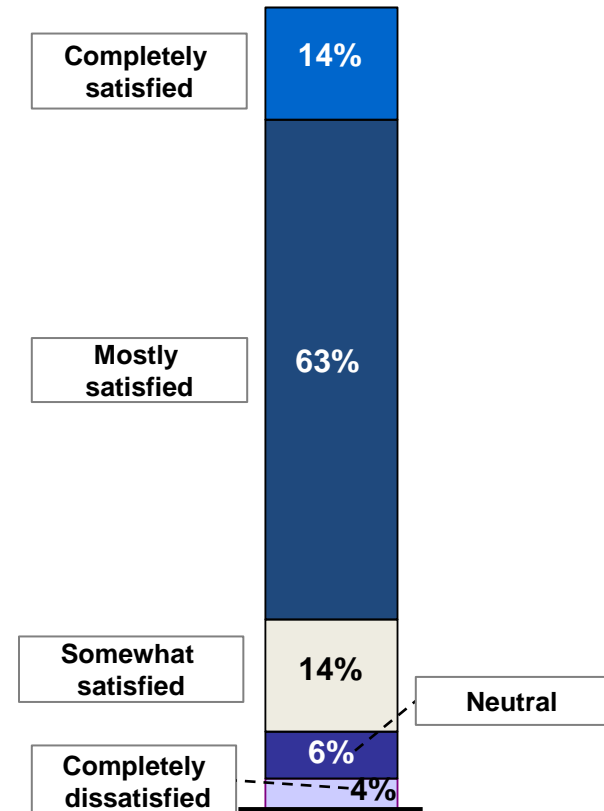
	Comp. satisfied	Mostly satisfied	Somewhat satisfied	Neutral	Somewhat dissatisfied	Mostly dissatisfied	Completely dissatisfied
50 – 100 students	33%	67%	33%	0%	0%	0%	0%
101- 250 students	67%	33%	0%	0%	0%	0%	0%
251 – 500 students	0%	100%	0%	0%	0%	0%	0%
501 – 1,000 students	36%	36%	18%	0%	0%	9%	0%
1,001 – 3,000 students	0%	50%	13%	6%	13%	13%	6%
3,001- 5,000 students	21%	36%	29%	7%	0%	7%	0%
5,001 – 10,000 students	13%	65%	13%	4%	0%	0%	4%
10,000 + students	22%	43%	13%	13%	4%	0%	4%

# Arab educators who use Moodle are less satisfied than Blackboard users

## Satisfaction With Current LMS Moodle Users



## Satisfaction With Current LMS Blackboard Users



- Compared to educators who use Blackboard, Moodle users have slightly less satisfaction with their LMS



## Interested? Have Questions?

Everything you read here is only meant to give you a brief overview. You are encouraged to ask questions. Please contact

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Chief Executive Officer

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[www.tahseen.ae](http://www.tahseen.ae)