

Giving Voice to Distance Learners: Methodological Decisions and Challenges

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Abstract

This paper is set against the backdrop of growing concerns about retention and completion and reports on the experiences of distance learners using an innovative video diary approach to data collection. Video diary reflections were submitted by a purposive sample of 20 online/distance learners each week over a period of up to 16 weeks. Data were analysed using a thematic analysis method following the general principles of a phenomenological approach. Many of the key decision points in undertaking this type of research are described along with some of the methodological challenges and limitations. The lived experiences of first-time distance students are a complex phenomenon. The paper reports some of the main findings and reflects on alternative ways of studying the student experience along with the imperative of doing things better for this group of learners.

Keywords: Distance learners, lived experience, phenomenology, retention and completion, video diaries

Introduction

Online learning has enabled many institutions to explore ways of widening access to higher education to diverse and geographically dispersed learners. In 2013 it was calculated that in the United States, 34% of all higher education students now take at least one course online (Allen & Seaman, 2014). In the 2014 Babson Survey, Allen and Seaman (2015) report the rate of increase in online enrolments continues at rates far in excess of those of overall higher education. Furthermore, Massive Open Online Courses (MOOCs) from some of the world’s elite universities has been a step-change, which has given online learning greater credibility as a mainstream activity. However, the exponential growth of online students is juxtaposed with the retention and completion problems that have plagued distance learning ever since the first correspondence courses in the 19th Century (Dede; cited in Waldrop, 2013).

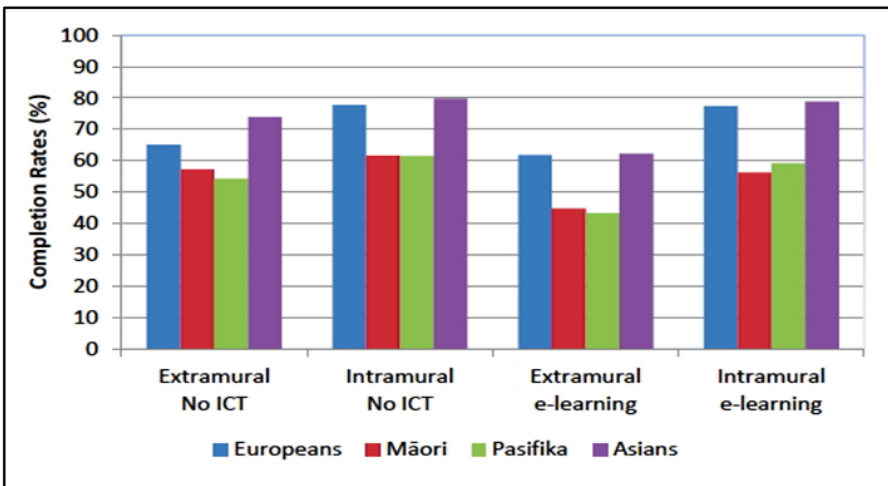


Figure 1. Intermural and Extramural completion rates and e-learning delivery

There is growing concern internationally about enhancing student success as the return on the public investment in higher education comes under greater scrutiny. In New Zealand, for example, a recent Ministry of Education (2014) report on the higher education sector claims that distance delivered courses, defined as ‘Extramural offerings, with an online e-learning component have far lower completion rates than other delivery modes (see Figure 1). Although the term e-learning is open to interpretation and this study raises a number of unanswered methodological questions about the validity of the data, Figure 2 taken from the report compares yearly completion rates for part-time undergraduates for New Zealand’s largest distance

education provider, Massey University, with the Open University in the United Kingdom (UK).

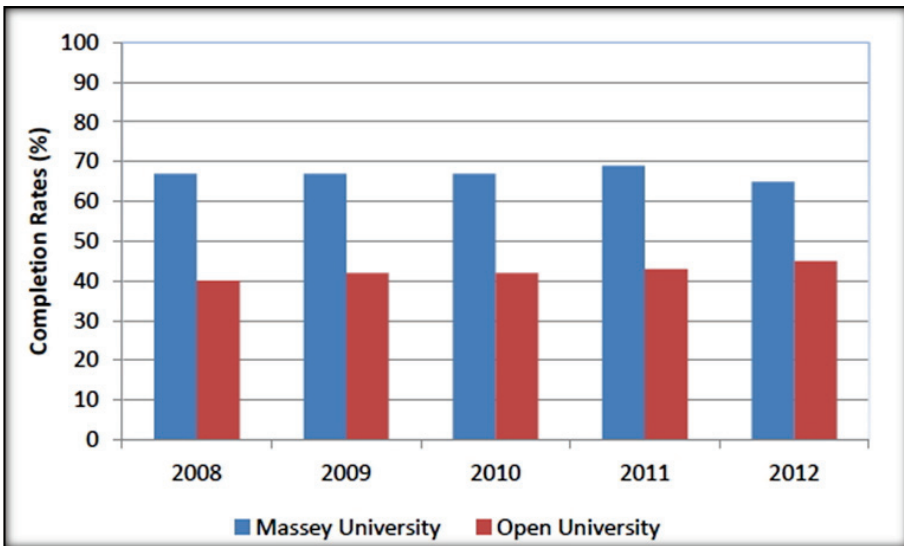


Figure 2. Comparison of part-time undergraduate completion rates between Massey and UK Open University

Massey University is a dual mode provider – that is, it offers distance (extramural) education along with internal courses on three campuses throughout New Zealand. In contrast the UK Open University only offers courses by distance and is a truly open university. On the surface the figures for Massey compare favourably with the UK Open University, although the report notes that ‘when we adjust for course level and do not focus on a particular group of students, Massey University and the Open University have comparable extramural course completion rates’ (Ministry of Education, 2014, p.30). Nevertheless, an earlier study on the problem of retention found that at the Open University only 22% of undergraduate distance students completed their study within eight academic years (HEFCE, 2009). This study raises its own methodological questions about the definition of distance learners, and it needs to be noted when undertaking international comparisons that the method of determining retention, progression and completion rates vary according to country.

That said, annual OECD (2013) league tables published in *Education at a Glance* show that New Zealand consistently performs poorly in student completion, with a rate of 66% reported in 2011 for Type A Education (degree level) in comparison to 79% for the UK. Notably, the completion rate for the United States is even lower with 64% of

Type A students, which compares with an OECD average of 70% for all member countries. Putting aside differences in how individual countries define and collect these data, the level of concern over retention and completion rates for online/distance learners is well-justified and clearly higher education institutions need to do more to support student success.

However, there are no magic bullets (Tinto, 2006-2007). Moreover, Simpson (2003) cautions against a 'goulash' approach whereby institutions try lots of interventions that might work but, meanwhile, fail to focus on the most important things and cannot ever discover what is working best. It also needs to be noted that the problem of enhancing retention is often framed around promoting student engagement from an institutional definition rather than from a student perspective. In this respect, we need to bear in mind that we know from the literature on the study of retention and completion many soft factors influence student engagement and the field is particularly complex (Zepke & Leach, 2010). For example, the factors that attract students to online and distance education, such as greater flexibility over pace and place of study, are often the same factors which can lead them to struggling and withdrawing.

It is also noteworthy that typically distance students who choose to study off-campus have very different backgrounds from campus-based students (Baxter, 2012; Poskitt, Rees, Suddaby & Radloff, 2011). In the developed world, generally speaking, the background demographics of distance learners indicate they are more likely to be over the age of 25, women or from a lower socio-economic group, returning to study after a break, and/or working part-time or full-time. While we know quite a lot about the background of distance learners, the concept of student engagement has many different faces and there is a significant gap in the literature in understanding the experiences of these learners from their own perspective. The study reported in this paper sought to address this gap in order to better understand what it means to be an active and engaged online/distance learner. In so doing the research raises a number of methodological issues about how to do things better which are outlined in the discussion below.

The Study

The study was framed to address the sub-theme of ‘learner support and development’ and the following guiding research question identified from a Delphi analysis of the field of Distance Education (Zawacki-Richter, 2009):

What skills, supports and processes are required by learners in the new ICT distance learning environments to ensure successful learner outcomes?

The methodology was anchored around Design-based Research involving a mixed method approach over three phases:

- Phase One involved an audit of current institutional services and resources supporting distance learners at Charles Sturt University (Australia) and Massey University (New Zealand).
- Phase Two involved the recruitment of a sample of first-time distance learners at Massey University and a pre and post semester survey to establish their goals, intentions and backgrounds.
- Phase Three was the major component of the study, which involved gathering the lived experiences of 20 first-time distance learners, in their own words, using weekly video diaries for data collection.

The overarching methodology of Design-based Research served as a guiding beacon for the development of key principles for enhancing educational outcomes for online/distance learners. Design-based Research has received increasing attention from researchers in education for its iterative and integrative qualities (Reeves, 2006). It aims to make a grounded connection between research and real-world contexts. The methodology can be thought of as seeking to develop best practice in complex learning environments through the incorporation of evaluation and empirical analyses, from which multiple entry points for various scholarly endeavours arise (Anderson & Shattuck, 2012).

Phenomenological inquiry

Under the umbrella of this methodology, the study employed a phenomenological approach during Phase Three to explore the ‘lived experiences’ of first-time online/distance learners, in their own words, over their first semester of study at Massey University, New Zealand (see Brown, Keppell, Hughes, Hard, Shillington &

Smith, 2013). Importantly, in this study ‘distance education’ is defined as study undertaken by students who are primarily off-campus and involving online learning.

Although subject to considerable debate over the years, the classical phenomenological approach was conceived by Husserl (1859-1938) and advanced as a scientific method in the field of psychology by Giorgi (1985). This philosophical perspective aims to provide insights into understanding human experiences by producing deep descriptions of these experiences while people undergo and live through them. As distinct from divergent fields of interpretive hermeneutic phenomenology advanced by Heidegger (1889-1976), and staying close to Husserl, Giorgi adopted Merleau-Ponty’s (1962) four criteria for ‘descriptive’ phenomenology: description, reduction, essence and intentionality.

In this pure or classical definition the first characteristic of phenomenology is ‘description’, which means focusing on the things themselves. In other words, phenomenology is concerned with describing things as one experiences them by placing a person’s experience at the centre of any investigation. The second characteristic of phenomenology is ‘reduction’ or ‘bracketing’ by the researcher who needs to temporarily suspend taken for granted assumptions and presuppositions about phenomena so the things themselves can be returned to at an appropriate time. The researcher is said to employ a reduction when they begin to analyse the descriptions but during this stage they need to stay close to what is given to them in all its richness and complexity, and restrict themselves to making assertions which are supported by appropriate intuitive validations. However, although the description of individual phenomena is interesting in its own right, the researcher usually comes to a point where they want to say something about the class the phenomenon is a part of. In classical phenomenology the literature talks about seeking the essence of something, which refers to the core meaning of an individual’s experience of any given phenomenon that makes it what it is. The final characteristic within a phenomenological study is ‘intentionality’, which maintains that there is an inseparable connectedness of the human being to the world to which they belong.

Importantly, recent critiques and contemporary interpretations of phenomenological inquiry argue that there is no *pure* phenomenology and methods cannot be formalised into a series of technical procedures. Thus, in many respects *doing* Phenomenology was more of a philosophical commitment by the researchers to a particular line of inquiry. Mindful of Post-Structural critiques of Phenomenology (see Stoller, 2009), the study drew on the general tradition of phenomenology rather than the any pure

definition or strict criteria in developing a 'reflective prompt' data collection protocol, and data analysis techniques, appropriate to the research question and particular sample.

Sample Selection

The first challenge in studying a group of first-time distance learners is identifying a sample of prospective students before they have formally registered. This is not an easy task. Nevertheless, the importance of doing so is that we have growing appreciation of how the decisions prospective students make in the initial period of the study lifecycle can significantly influence their chances of success (Simpson, 2004). In our case to obtain a sample of first-time distance learners we had to rely upon access to institutional data from people who had formally expressed their intent to register. For ethical and internal institutional reasons it was not possible to source the sample through an independent communication channel, although such an approach may have been more successful in locating people much earlier in the study lifecycle. This remains an interesting methodological challenge in designing this type of study and potentially biases the sample by excluding people who discontinue before completion of the formal registration process.

Prior to the start of Semester 2 in 2011, with approval from the University's Human Ethics Committee, enrolment data was obtained for 750 students studying via distance for the first time. The method of recruitment was by email from the Project Leader to all potential participants at the point when their registration had been approved. The invitation included a Participant Information Sheet, which fully explained why students might consider recording video diaries for the purpose of research.

In total, 144 students volunteered to participate. This was a larger sample than anticipated and to acknowledge the high level of interest in participating in the study, and to add another valuable dimension to the research, these students were invited to complete an online questionnaire on their initial experiences of being a distance learner (Phase Two). Based on the survey responses, coupled with demographic data, 20 students were purposefully selected to participate in the main study (see Table 1). In selecting this sample the intention was to broadly represent the diversity of first-time distance learners. The profile of diversity was informed by a demographic analysis of the University's distance students during the 2010 academic year. Selection criteria included: gender, age, ethnicity, geographic location, mode of study (distance i.e. fully online to off-campus students or blended which involved a mix of online and face to face sessions), level of study (i.e. how many courses/papers the student had

registered for), subject of study, entry qualification (i.e. prior or current experience of tertiary study on-campus; ‘degree papers’ indicates some successful higher education already completed), employment status and whether or not the student had any dependents.

Table 1: Summary of participant sample

Gender	Male (7), Female (13)
Age	Under 25 (4), 25-29 (4), 30-39 (6), 40-49 (4), 50-59 (2)
Dependents	None (11), One (1), Two or three (5), Four or more (3)
Ethnicity	Pakeha / European (12), Māori and/or Pasifika (8)
Location	City/Town close to a Massey campus (11), Other urban town (3), Remote (4), Overseas (2)
Mode	Distance only (17), Mixed mode (3)
Total papers (courses)	Undergraduate: One (6), Two (6), Three (0), Four (6); Postgraduate (2)
Subject	Business (8), Humanities (6), Education (3), Sciences (3)
Prior education	High school (8), Diploma (2), Degree papers (5), Degree (5)
Employment	Full time (11), Part time (3), Casual (1), None (3), Full time carer (2)

Important Methodological Decisions

This section expands on some of the methodological decisions and challenges associated with researching the student experience whilst endeavouring to maintain a strong sense of the learner’s voice. In particular, it describes some of the issues and decision points that arose from adopting a phenomenological approach to data collection and analysis. As outlined above, Phenomenology is concerned with describing events as one experiences them by placing a person’s experience at the centre of any investigation. Put simply, the role of the researcher in phenomenology is to understand the essence of something as experienced by the participant. Of course, the challenge is to undertake phenomenological inquiry whilst seeking to avoid bias in any interpretation through the researchers’ own theoretical lens. It needs to be acknowledged that no researcher can be entirely neutral and this remains an inherent flaw with phenomenological inquiry.

Of the many methods and techniques of gathering qualitative data, some are more suited to phenomenology than others. Methods with a closer affinity to the approach include interviewee narratives, participant observation, and reflective diaries, to name a few. The current study was partially inspired by a method designed by Cashmore, Green and Scott (2010) who gathered video diary data with undergraduate students at the University of Leicester. They provided participants with small, hand-held video cameras and asked them to submit a minimum of a five-minute video diary on a

weekly basis. In an attempt to minimize interventions during the data gathering process, students were informed that they could focus on any topic, theme or concern that they perceived was important to their lives and their student experience. However, amid their commitment to free-flowing ethnographic data collection, Cashmore, Green and Scott (2010) acknowledged wide variation amongst participants with some submitting five minutes every fortnight and others submitting more than 20 minutes every week.

Mindful of the challenges associated with managing and making sense of free-flow video diary data, the research team for the Massey study considered a number of options of how to gather participant contributions in a way that ensured enough consistency in the questions and experiences being explored, whilst remaining true to the intent of trying to understand what it means to be a first-time distance learner from a student's perspective.

In trying to strike a balance between structure and free-flow the study also drew on the 'Day Experience Method' employed by the Learning Landscape Project at the University of Cambridge (Riddle & Arnold, 2007). This project had in turn been informed by the 'Experience Sampling Methodology' from the behavioural sciences (Hektner et al., 2006). The aim of the Learning Landscape Project was to minimize recall distortion by encouraging participants to provide detailed accounts of their daily experiences over time and capture the ebb and flow of these experiences as they occur in situ. Riddle and Arnold therefore asked participants to diarise the answer to five pre-specified questions (What time is it? Where are you? Who are you with? What are you doing? How do you feel about it?) when prompted via text message every 30 to 90 minutes between 8am and 10pm on three separate days.

After considering the pros and cons of various data collection methods we devised a 'Reflective Prompt' protocol that provided some structure but also maintained an element of individual free-flow expression. The protocol requested that each participant would upload at least one five-minute digital video file per week via a secure website (Moodle) to which only the Research Assistant had access. Within 48 hours of a participant uploading their video file, the Research Assistant would transcribe the video data before responding to the individual participant via the project email account (In Your Own Words). The original intention was that the email would contain an amiable yet emotionally detached greeting followed by a set of 'reflective prompts' designed to trigger reflections for the participant's next video diary. In other words, all participants would be encouraged to reflect on their

online/distance learning experiences by prompting their thoughts with personalised 'fish-hooks' that were based on each individual trajectory, as it emerged over time.

The 'Reflective Prompt' framework aimed to uphold the general principle that phenomena should be allowed to present themselves with minimum influence or imposition from the researcher. Therefore, the framework was structured as follows:

- **Prompt 1:** What's on your mind at the moment?
- **Prompt 2:** Fish-hooks for learning-related experiences (e.g. You mentioned an assignment was due. How did that go?).
- **Prompt 3:** Fish-hooks for support-related experiences (e.g. You mentioned waiting for an email response. Any news on that?).
- **Prompt 4:** What's on your plate next week?

However, during the first few weeks of the study it became increasingly apparent that many of the participants were forming a close bond with the Research Assistant. It was quickly apparent that the 'Reflective Prompt' framework and video diary interventions along with the weekly email exchanges with the Research Assistant were having a potentially significant impact on the student experience. The Research Assistant had inadvertently become a default point of contact with the institution and potentially this role was having a positive impact on their sense of belonging as a first-time distance learner. After discussing this situation amongst the research team, and consulting with the University's Ethics Committee, we did not believe it was appropriate to reduce the level of interaction with the participants or depersonalise the reflective fishhooks.

Data analysis

A considerable amount of rich qualitative data was collected from all 20 participants during the first six weeks. Originally the research was intended to explore just the first few weeks of study but after realising the positive impact the intervention was having on participants they were given the opportunity to continue until the end of semester. Although continuation of the video diaries beyond the initial six weeks was not part of the original plan as we were primarily interested in the initial stages of the study lifecycle, it was considered potentially unethical to cease data collection at this point. Moreover, we had already learnt from the participants that the provision of student support was crucial beyond the first few weeks of study.

Eight participants chose to conclude at this point, while 12 opted to continue for sixteen weeks – that is, until after the examination period and official end of semester. In total, including this extended period, more than 22 hours of video data were collected, which provided rich insights into the student experience. In order to accurately tell the student’s story of their lived experiences of being a first-time distance learner, we employed a six-step thematic analysis (Braun & Clarke, 2003). The six steps are described below:

Familiarizing yourself with the data

This step recognises that it is vital for a researcher to immerse themselves in their data to the extent that they are familiar with the depth and breadth of the content. Throughout the study, the Research Assistant transcribed video files within 48 hours of receipt, which was a process that achieved almost ‘real-time’ immersion. Importantly, the researcher did not attempt to thematicise the data at this stage.

Generating initial codes

This step sought to identify and code particular data that appeared relevant to the research objective. Although data can never be coded in an epistemological vacuum, the aim was to discover meanings in the data whilst remaining open to unexpected interpretations. The end of this step was a series of meaning units still expressed in the participant's own everyday language.

Searching for themes

This step is where elemental units of coded data were combined to form overarching candidate themes. While we found that some units did not collate naturally with other units nothing was abandoned.

Reviewing themes

At this stage of the process it became evident that some candidate themes did not have enough data to support them. Other candidate themes were better collapsed to form one theme. This was an iterative process that helped us over the course of the semester to more clearly identify the emergent themes.

Defining themes

This step involved identifying the ‘essence’ of what each theme was about by returning to collated data extracts and connecting them together. Of course the problem here is that raw data (i.e. the participant’s story) was transformed at this point by our

interpretation, which we could not avoid being influenced by our own stories. Nevertheless, to remain true to telling the participant's story we sought validation of the full transcripts and endeavoured to share our interpretations with students. The question remains whether the participants truly validated their own data by engaging in this process. Although we had limited control over this aspect of the methodology, wherever possible we tried to use direct quotes as part of larger extracts to encapsulate the full context.

Producing the report

It is important that any written analysis provides a concise, accurate and interesting account of the story that the data tells. To this end we attempted to share enough data extracts to demonstrate the prevalence of each theme, whilst also providing an analytic narrative of discoveries that related to the research questions. Again the challenge during this stage was maintaining the integrity of the participants' stories within our larger analysis of the meta-story. This issue became more difficult as time elapsed in reporting the findings and the research team became more distant from the original data.

Reflecting on Key Findings

The lived experience of first-time distance learners presented itself as a complex phenomenon involving a dynamic process of personal adjustment to study amid enabling and inhibiting triggers. We have chosen not to report on the findings in any great detail as they have already been described at length in other publications (see for example, Brown, Hughes, Keppell, Hard & Smith, 2013). However, three points are noteworthy. Firstly, in terms of preparedness to meet the academic and emotional demands of learning by distance, more than one third of participants were returning to study for the first time since secondary school after an interval of more than a decade. From within this sub group, the majority struggled to find effective study techniques to meet the demands of university-level study. Notably, few students knew about or took advantage of the support services available for first-time distance learners. This period prior to study therefore represents an 'at risk period' to the extent that the decisions and actions prospective students and institutions take, or do not take, can influence successful outcomes which impact on all parties. Recognising that things can go wrong, and endeavouring to ensure that students know in advance where and how to source support, are of critical importance as, once study begins, the logistics of sourcing support amid the pressures of everyday life may overwhelm new distance learners.

Secondly, a significant period of risk was identified in the second half of semester when the majority of participants began to question their ability to complete their programme of study. During this period, students often resolved to study fewer units (modules) per semester or concluded that online/distance education did not suit either their approach to learning or their lifestyle at that point in time. This second at risk period highlighted the misperceptions that most students began with concerning the flexibility of studying from a distance. Those for whom learning actively took place amid a sustainable study routine that accounted for predictable as well as unpredictable distractions, and who developed study-related relationships in a digital environment fared best. In the face of adversity, this strategy allowed participants to maintain a resilient attitude.

Lastly, there is a 'chicken-or-egg' debate over what comes first: the preference towards an inherently 'lone wolf' approach among learners who choose to study by distance; or failings among distance education providers to establish connectedness with and between their students. The insights gained from the sample of first-time distance learners suggest that institutions could do more to challenge student's self-sufficient conception of what it means to be a distance learner. It is not enough to rely on chance that they will take opportunities to interact with teachers, peers and academic support staff – or even find necessary levels of learning support from people in their immediate vicinity with whom they enjoy an established sense of relatedness.

The role of teachers in building social confidence and shaping the social culture of a digital learning environment (Jones, Ramana, Cross & Healing, 2010) is worthy of further study. Additionally, the use of video diaries to support reflective practice for teachers and to explore how teachers foster a sense of belonging for first time distance learners are among topics which represent fertile ground for future research.

Conclusion

This study has described how we sought to document the lived experiences of first-time online/distance learners as seen from 20 participants over a 16-week period. There is, to our knowledge, no other study that has described using the same video diary methodology the *lived experiences* during this key transition in the study lifecycle. In this paper we have focussed on some of the methodological lessons and challenges of doing things better in studying the student experience. Amongst other things this line of research has helped us better understand why the participants chose to enrol via distance learning, which was largely because of circumstance rather than by design. The study observed that only a minority of participants – all with more

active and deep learning orientations – spoke in a consistently positive way about the joys of online/distance learning. In contrast, the majority of participants reported notable periods of isolation and despair. They spoke consistently about their first semester as a challenge during which they had struggled to balance study with other work and family demands.

In summary, this research has contributed to new knowledge on two fronts. Firstly, the study has helped to identify some of the methodological challenges of doing better research on the student experience from a learners' perspective. A recent analysis of the literature shows that research on learners and student support services remains a priority area for further investigation (Bozkurt, et al., 2015). Secondly, the study has helped to personalise the problem of retention to real people and share the voice of distance learners, which in turns underscores the imperative of why institutions, teachers and support staff need to do things better for this unique and increasing group of students. We have a moral imperative to ensure that all students irrespective of background or study mode are prepared for success as higher education helps to transform lives and societies.

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