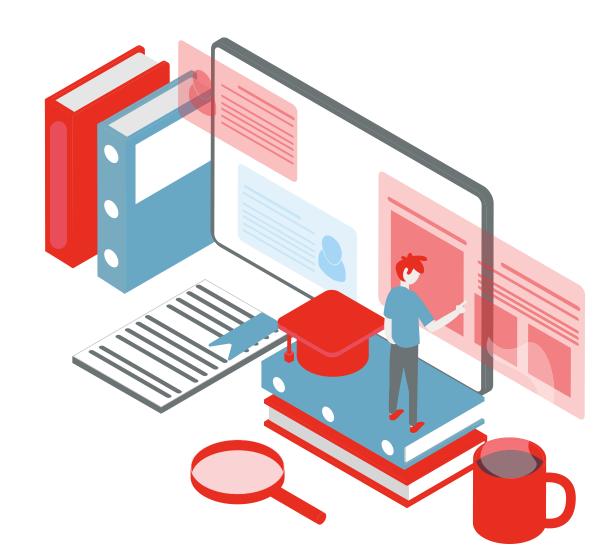
The Creative
Entrepreneurship
E-Learning
Landscape
Report

2019-2020





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The objective of this research report is to present the **global trends** impacting **E-learning** today and identify opportunities therein to support entrepreneurs. This report also aims to identify the **tools** and resources most desired by **creative entrepreneurs** from both a student and market perspective to identify the best point of entry.

METHODOLOGY

Using a combination of desk research and ethnographic methods we identified trends, needs, and opportunities in the creative e-learning marketplace.

Over a two month period, we conducted one-on-one interviews and focus groups. We targeted creative entrepreneurs, industry professionals, and service providers. We completed secondary research to identify current market offerings and trends including accredited and non-accredited programs, incubator and accelerator offerings, and e-learning marketplaces.

The synthesis from the focus groups and one-on-one interviews are included in this report as are the tools and raw data links in the appendix.

Secondary research





online research

literature research

Primary research





focus groups

interviews

GLOBAL TRENDS IN ENTREPRENEURSHIP

We start at a macro level with global trends in this report because it is important to gain a contextual understanding of the sector we would like to analyse as a possible area of opportunity for investment. We home into meso than micro trends thereafter. Like other trends, macro trends impact market sectors in both positive and negative ways, their implications are important considerations, taking what experts are predicting for the future into account when assessing and analyzing a sector. Although there are many other global trends impacting creative entrepreneurs and their e-learning as a whole, such as the upcoming election, the state of the economy, and new technologies, we focus primarily on the trends affecting the stakeholders within and around these learners to understand how these changes might impact the domestic creative entrepreneurial e-learning sector.

Today's Global Entrepreneurial Landscape

The global start-up ecosystem was worth \$2.8 trillion in value between 2016 and 2018, a 20% increase in two years as per the 2019 Global Start-up Ecosystem Report (GSER) report from Start-up Genome and the Global Entrepreneurship Network (GEN). In the same vein, 2018 saw \$220 billion in total VC investments, the highest in a decade.1

exponential growth in entrepreneurship:

2019

BILLION

VC INVESTEMNETS

While currently, the top 5 start-up ecosystems in the world are Silicon Valley, New York City, London, Beijing, and Boston, the report concludes that there are nearly 50 regions worldwide that are creating at least \$4 billion each in ecosystem value. Two decades ago, at the peak of the dot com boom, only four regions could boast as much value creation by start-ups.²

REGIONS



Across the world, there are 25 start-up ecosystems with Some highlights from the report that demonstrate the an ecosystem value above \$10 billion each, adding up to nearly \$1 trillion in economic value.

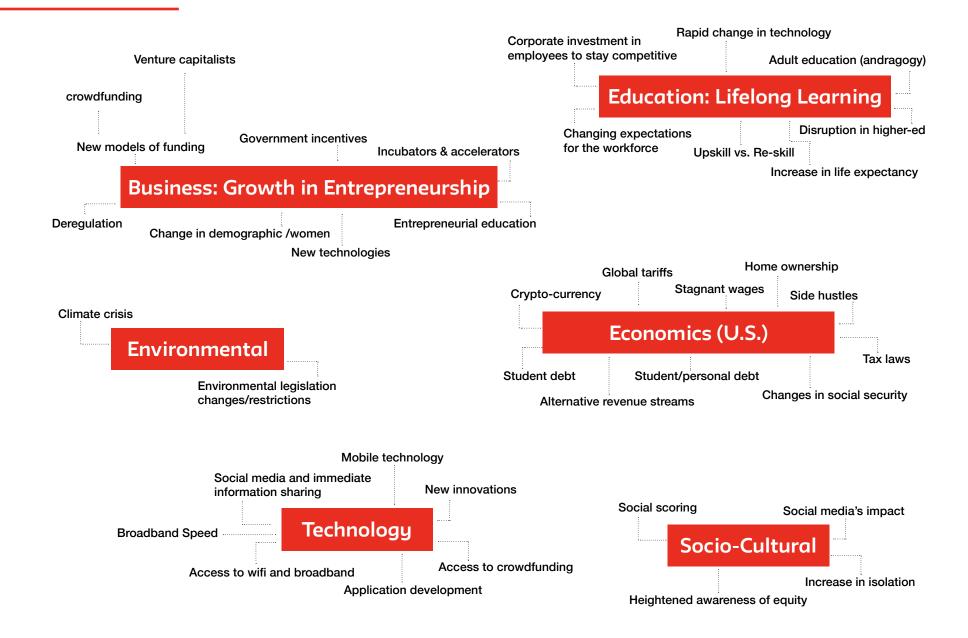
START-UPS ECOSYSTEMS



\$1,000,000,000,000 **ECONOMIC VALUE**

With 9 European hubs ranked in the top 30 startup ecosystems (London, Paris, Berlin, Stockholm, Amsterdam Start-up Delta, Lausanne-Bern-Geneva, Munich, and Barcelona), Europe is overall the most promising continent for entrepreneurship.

GLOBAL TRENDS MAP



Instead of one new center or two new centers (of entrepreneurship, besides Silicon Valley), there are 30, and there will be clusters in different places that don't quite get to the density of the Bay Area but get beyond critical mass.

- Sam Altman, Y Combinator and OpenAl

Figure 1 Global trends map 2020

This tide of start-ups has fueled the rise of incubators and accelerators that offer support to start-ups in the form of investment, mentorship, working space, networking opportunities, etc., typically in exchange for a small equity stake in the company or a real estate model.

Some of the top incubators, globally, include: Y Combinator, Techstars, 500 Start-ups, AngelPad, Seedcamp, Capital Factory, ERA, Amplify, Betaworks, and TechNexus. 4

Sparked by technology, sectors that are driving growth in investments are Advanced Manufacturing & Robotics, Blockchain, Agtech & New Food, and Artificial Intelligence. Innovation in tech seems to be the magic ingredient here as trends show that there's a decline in investments of social media apps, digital media, and IoT companies.



Figure 2 Global start-up ecosystem report 2019 3

TRENDS IN **ENTREPRENEURSHIP**

Solo-preneurs and Women in Entrepreneurship

The Global Entrepreneurship Monitor (GEM) 2018/2019 Women's Entrepreneurship Report, included a section on solo businesses, analyzing data from 59 economies, where there are 231 million women entrepreneurs.5

MILLION

WOMEN **ENTREPRENEURS**



37.6%

sole proprietorship owned by women

29%

sole proprietorship owned by women in North America

proprietorships, compared to 27.8% of men, the report solo-preneurs account for more "total entrepreneurial found, women are more likely to own sole proprietorships activity (TEA)" than women with 32% of total than men.

37.6% of women around the world owning sole However, North America is the only region where male entrepreneurial activity compared to women at 29%.

Note: TEA is the percentage of the adult working-age population [18-64] who are either "nascent" - meaning they're in the first three months of paying someone from the business — or running new businesses past that stage.

Historically academic research and policy makers focusing on entrepreneurial ecosystems have focused on income and job creation, generally derived from scalable start-ups. So including solo-preneurs is a significant shift in interpretation and assessment of impact.

"Self-employed entrepreneurs are, de facto, creating jobs, even if only for themselves, jobs that will often support families. To the extent this form of entrepreneurship reflects work preferences and perhaps work-life balance, a contribution to societal well-being is implied".6

U.S. Trends

The U.S. is one of the largest ecosystems for start-ups in the world. According to the Venture Monitor report 2018 by Pitchbook and National Venture Capital association, the VC industry set a new benchmark in 2018 with \$130.9 billion invested across 8,948 US venture deals. This was the first time since the height of the dot-com boom of 2000 that capital investments eclipsed the \$100 billion mark.⁷

While the overall outlook for the sector remains positive, some analysts predict that the ecosystem is reaching maturity or showing stable growth.⁸ Countrywide growth might be steady, but entrepreneurship is booming in 'Surge Cities' like Austin; Raleigh, North Carolina; Nashville; Salt Lake City; and San Francisco. Surge Cities are 50 of the best places in America for starting a business developed by the Start-up Genome. ⁹

Who are the start-up owners of today?

In keeping with global trends, the focus on gender parity in the innovation ecosystem has increased among start-ups and small business owners. The percentage of start-ups with at least one woman in an executive position was 53% in 2019, a 10% increased compared to the previous year. ¹⁰



53%

EXECUTIVE POSITION

Looking at the National Small Business Association's 2017 Year-End Economic report, there was a 4% increase in women small business owners year over year, standing at a total of 27%.



One factor for this growth is the rise to a new kind of entrepreneur: the "mom-preneur." Typically ex-corporate professionals, these web-driven women launch home businesses over platforms such as Rodan+Fields, eBay, and other e-commerce sites, specializing in the sale of antiques, jewelry, thrift-store fashions, and other items. Aided by digital photography, wireless technology, and friendly postal workers, these savvy moms are one of the fastest-growing segments of entrepreneurs building successful businesses on the web. ¹¹

From a demographic standpoint, 44% of small business owners are Gen Xers (39 to 54 years old). These Gen X small business owners slightly lead baby boomer small business owners (55 to 73 years old), at 41%. Millennials (23 to 38 years old) came in third, at 12%, while only two percent of small business owners are 74 years old or older. ¹² The AARP predicts that silver-haired entrepreneurs will continue to rise in the coming years. According to a recent study by the Kauffman Foundation, Baby Boomers are twice as likely as Millennials to start a new business. ¹³

Culture of start-up work

Many interesting changes have happened in terms of the culture of start-ups. One such shift is the growing popularity of coworking spaces that not only provide an office environment to freelancers, entrepreneurs, and remote working professionals but also a supportive entrepreneurial environment and a nurturing community.

This tilt towards remote work will increase: "People will be spending less time commuting and traveling but more time working remotely, causing business leaders to find other ways to share corporate info and increase workplace collaboration." – Jen Grogono, CEO of uStudio. 15

66 People will be spending less time commuting and traveling but more time working remotely, causing business leaders to find other ways to share corporate info and increase

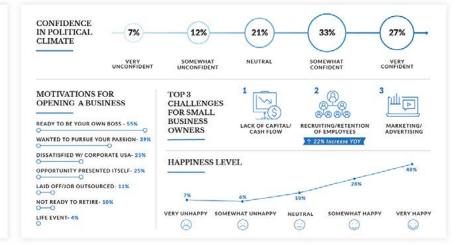
workplace collaboration.

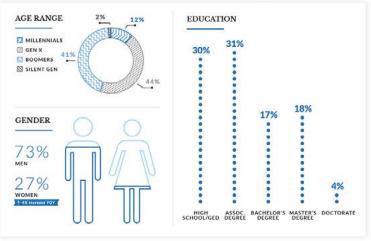
- Jen Grogono, CEO of uStudio

Where future growth is expected to come from

- Industry-specific start-ups serving niches will see the most significant growth. 16
- The best industries to start a business in are technology, health, energy, media, and consumer retail. ¹⁷ Al and big data are the technologies with the most promise. Looking ahead a decade, autonomous transportation is expected to make the biggest leap in potential, taking the second spot after Al. 18







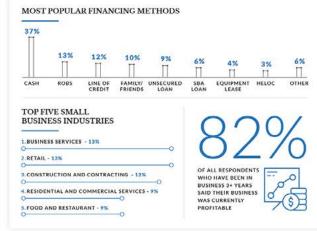




Figure 3

Image source: Guidant financial 19

TRENDS IN CREATIVE ENTREPRENEURSHIP

The Evolving Creative Sectors

In the past five years, tech's impact has led to shifts and growth in creative freelance market. Online tools have made it easier for freelancers to find and manage work; this includes managing clients and managing their finances. However, for digital creatives, while the tools have gotten better and more integrated, they have also allowed for more competition from global suppliers who can undercut local suppliers for graphics, web, and design services. This access to work posted online, while creating a form of democratization, has created an unsustainable market pressure for local freelancers in the gig economy.

Alternative millennial workers have consistently earned less than their full-time peers for more than a decade. And 43% of alternative workers have listed insufficient pay as their reason for leaving the freelancing industry.

- Report by Deloitte, Technology and the Future of Work: Millennials in the Gig Economy 20

•• There are currently 57.3 million freelancers in America, an increase of 3.7 million in the past five years. Of these, an estimated two-thirds use freelancing to supplement their income while also holding a traditional job. 99

- According to the Deloitte 2018 report

Need for a "Gig" economy

A 2019 study by The Design Journal, a Routledge publication, found that 60 percent of fashion designers in the UK are self-employed 21, which reflects a trend in the creative industries that reveals a common drive for entrepreneurialism. Along with this, they found that creative professionals, whether an entrepreneur or not, must market their capacities to ensure they are needed default.



Another factor of one's potential requires creatives to blur the lines of work and non-work hours in order to market themselves, find work, and develop experience in a competitive sector, this is defined as 'network sociality.' This blurring of the lines brings an increase in precarious working conditions that force new entries into free or for subsistence wages.²²

As the design's function or role evolves, so does the workforce, and thus, it requires designers to pick up new skills and forms of work that can require them to:

- acquire forms of expertise
- be highly mobile moving from one job or project to the next
- prepared to move from one geographical site to the next.

This evolution suggests that designers continuously and paid. As a result, creatives are entrepreneurs by need to reevaluate their position in the workplace. The rise of enterprise in the design sector suggests that designers not only need to be designers but consider how to use their skills in order to remain employable or in other words be 'marketable.' This constant reevaluation takes the designer beyond traits such as:

- creativity, ingenuity and imagination
- AND means they must be flexible, enterprising, socially responsible communicator, plus be an active promoter of their work.

Thus 'designers are a combination of craft maker, cultural intermediary and opportunistic entrepreneur'. Designers are encouraged to be 'practical artists', who exercise autonomy and freedom but within the parameters of commercial pressures. 23

GLOBAL E-LEARNING

TRENDS IN **GLOBAL E-LEARNING**

The global e-learning market was valued at \$190 billion Over the last decade, e-learning services have evolved to Globally, the top 5 markets for online education are: 28 in 2018 ²⁴ and is expected to reach \$238 billion by 2024, suit changing consumer preferences and to incorporate growing at a CAGR of 8.5% between 2019-2024. ²⁵ new technologies. Key among these developments that Some predictions even project this size to breach the \$300 billion mark by 2025. ²⁶

BILLION 2019-24 \$238

Cultural factors driving this growth include: the rising need and awareness among working professionals to enhance skill-based proficiencies, growing adoption of self-paced learning modules by the corporate sector to enhance talent retention, and engagement and the global digital expansion of education.

will continue to fuel growth are:

- Models such as video-based learning. gamification, and virtual classrooms that are high on engagement levels and perceived effectiveness
- The popularity of microlearning, using of bitesized learning modules and short-term learning activities
- Flexible formats for courses, certifications and degree programs that facilitate job placement, and transition to other disciplines 27

BILLION United States

India

BILLION China

South Korea

BILLION United Kingdom



As the gig economy continues to expand and digital access empowers developing countries, the democratizing nature of self-paced, online education makes it well-poised to cater to multiple consumer segments across the globe.

TRENDS IN LIFE LONG LEARNING

Adult education today

The acceleration of technological innovation has led to rapid change and demand for new skills for businesses across industries. This new market has led to surging needs from companies who must invest in education and advancing their employees as a way to gain a competitive advantage. This incessant need to keep up from both business and individual has lead to growth in the adult, corporate education, and executive education.³¹

Couple this trend with the data from the Bureau of Labor and Statistics 2017 report that projects by 2024, the U.S. workforce will grow to approximately 164 million people. This number includes 54 million people 55 years and older. ³² They report that people are working later into their lives because people are healthier and living longer than previous generations. Changes in social security benefits and employee retirement plans along, with a need to save more for retirement with the expected longer life expectancy, also play a hand in this shift. BLS Data also shows an increase in self-employment in this cohort. Therefore, staying employed for longer and with this phenomenon need to skill up over time as well as change careers several times over one's employment years. Organizations like AARP, for people over fifty, now offer online and in-person educational programs at no-cost, including job search skills, family caregiving, and new technology. A special report published by The Economist in 2017 highlights the economic imperative of lifelong learning: "technological change demands stronger and more continuous connections between education and employment. The ROI between education and employer is not as linear as it once was." ³³ The Economist report highlights the emergence and success of the digital skills-based education organizations like General Assembly, noting that most of the General Assembly's curriculum is informed by what employers and corporations are looking for and what their organizations fall short with supplying.



2024

by 2024, that U.S. workforce will grow to

164 MILLION

54 MILLION

will be 55 years and older

Technological change demands stronger and more continuous connections between education and employment. The ROI between education and employer is not as linear as it once was.

-The Economist, 2017

A report published by the IDB (Inter-American Development Bank) titled "Disrupting Talent - The Emergence of Coding Bootcamps and the Future of Digital Skills" reports that the development of digital skills based training academies including General Assembly and Brainstation have become a necessity for adult learners as continual developments in technology take place: "there are two implications for today's workforce: (i) many workers will need to 'upskill' continually so that they can work more effectively in their current positions with digital technologies, and (ii) the need for people to re-skill in order to prepare themselves for work in new roles." 34

There are some behaviors associated with adult learners that differ from children. Malcolm Knowles, the American educator, and adult education theorist, suggests there are four principles to Andragogy 35:

- Adults need to be involved in the planning and evaluation of their instruction.
- Experience (including mistakes) provides the basis for the learning activities.
- Adults are most interested in learning subjects that have immediate relevance and impact on their job or personal life.
- Adult learning is problem-centered rather than content-oriented. ³⁶

Social Media and Lifelong Learning

Within the last 15 years, peer-to-peer learning through tools like Youtube, Instagram, and Podcasts has helped to facilitate lifelong learning. This sharing of knowledge includes the growing trend of online influencers offering education through long and short-form content. For example, influencer Jason Stone has more than 5 million followers that view his tips on growth and mentorship through Instagram stories and his feed. ³⁷

Lifelong learning is recognized as a critical educational goal, defined by intentional learning that primarily adults engage in throughout their personal and professional lives, allowing for informal, just-in-time, day-to-day learning. This on-demand learning can be for digital skills building or physical making through how-to videos.

flexibility to entrepreneurs that traditional education and e-learning may not offer. Instagram, for example, can offer short bits in stories and grid posts through videos, text, or images that can be viewed at any time in short doses that do not always need high production value content. for valuable content. YouTube influencers give viewers more detailed learning and offer reviews, and comments which help build community and trust for the influencer. Other forms like podcasts also allow influencers to share information via free tools that give entrepreneurs lessons and inspiration on their time. Some examples are Creative Pep Talk ³⁸ and Being Boss ³⁹ that cover anything from inspiration to tips. These tools are allowing influencers to expand into other avenues, including events and conferences, as these two podcasts have done.

With all of these free platforms, influencers often offer other forms of paid content like courses, conferences, or events to monetize their value. Influencers can build trust through free content in order to gain success in their paid content, which is beneficial to entrepreneurs due to the flexibility, relatability of the influencers, and low cost

Corporate Education

These channels offer free and paid information that gives Firms today realize that employee retention requires the ability to 'upskill' their employees to keep up with the trends. This area of adult education has grown and been facilitated by learning platforms that allow easy access to tools and templates to create on-demand proprietary

> Corporations have also partnered with for-profit education organizations like General Assembly, which maintains campuses across the globe and online to train entrepreneurs and business professionals practical technology skills.

DISRUPTION IN HIGHER-ED

Student Enrollment At U.S. Colleges Down 11% Since 2011

About 2.3 million fewer students enrolled in college this fall than in fall 2011.

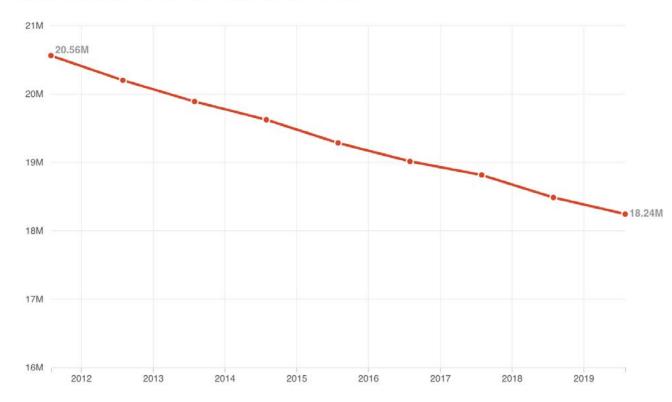


Figure 4 National student clearinghouse research center 41

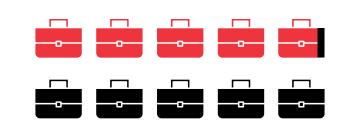
Several U.S. trends have been leading to a flatlining, prosperity and homeownership among millennials. and in some cases, a decline in enrollment in higher education. 40

College debt has become a national emergency and set to surpass homeownership as the leading source of debt among young Americans, leading to a decline in

The strong economy also plays a factor in declining college enrollment. As the economy improves and unemployment goes down, more people postpone or leave college and go to work.

There are also a plethora of new educational models In recent years employers have been offering college that do not have to conform to the rigor of accreditation degrees as incentives for retention and the new model so they can be more nimble and responsive to market for "Credegrees" allowing a cooperative relationship trends offering the latest skills for less, alluring alternatives between higher ed and corporations to both offer to accredited programs. These new platforms often a credential in skill while simultaneously earning a cost much less, offer better career services or support, bachelor's degree. 44 leading to faster placement and salaries in a tech-driven economy, 42

Online courses are gaining more credibility among employers as a substitute for a full-time degree. A survey of 600 U.S. employers conducted by Learning House, and Future Workplace found that two-thirds would consider applicants with a professional certification or change of technology, the skills that will potentially be a certificate of completion in place of a college degree, required for a job just a few years from now remains and 47 percent would hire a candidate with a MOOC (Massive open online courses) degree. 43



employers would hire a candidate with a MOOC degree

Another big elephant in the room is the 'skills gap'. The current U.S. unemployment rate is just 3.6%, yet there are 7.4 million job openings. 45 That is because many employers are looking for skills different than what the typical job-seeker has to offer. Even when there is a reasonable skill match, to begin with, with the pace of unpredictable. e-learning offers need-based, flexible solutions to close this gap for both job-seekers and employers in a much more cost-efficient manner.

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U.S. E-LEARNING

TRENDS

The e-learning industry in the U.S. has seen significant courses.⁴⁸ Microlearning delivers content to learners at growth and disruption in the past decade. MOOC their moment of need, and reinforces what they have platforms advanced asynchronous e-learning as a learned by making completed modules available for later method of learning opportunities to both students and review.⁴⁹ Short modules can be implemented across working adult professionals. According to The New York Times, 2012 became "the year of the MOOC" when several platforms associated with top universities emerged including: Coursera, Udacity, and edX. 46 The e-learning industry in North America has since shifted away from MOOCs and the self-paced lecture-style modality as providers found that most registrants were not completing the courses.⁴⁷ E-learning providers are now experimenting with new methods to keep users engaged, including: Microlearning, Gamification, Personalization via Artificial Intelligence, and Mobile Learning.

Trend Highlights



Microlearning

The clear advantage of microlearning is that it accommodates smaller increments of learning and thus improves learners' retention levels. Microlearning modules are no longer than 5 to 10 minutes, and thus learners don't feel fatigued or apprehensive about longer devices and lend themselves to stronger interactivity through videos, games, quizzes, and infographics.⁵⁰



Gamification is defined as the use of game design elements in non-game contexts.51 The objective of implementing games as a way of communicating knowledge and facilitating learning is to boost motivation levels, provide insights into learners' progress, and highlight knowledge gaps and strengths. Data from these insights is an easy way for learning managers to determine content for future learning strategies. Some of the most successful attributes of games applicable in educational environments are: 52

- Freedom to fail
- Rapid feedback
- Progression
- Storytelling and narrative



Personalization Learning (Al-powered adaptive learning)

Personalized learning delivers individual learners content, learning paths, or modes of learning to suit their specific needs. Adaptive learning systems are one way of delivering personalized learning and use a datadriven, nonlinear approach to instruction. This method, powered by AI technology, dynamically adjusts content to student interactions and performance levels, delivering the types of material in an appropriate sequence that individual learners need at specific points in time to make progress. Algorithms, assessments, student feedback, instructor adjustments/interventions, and various media are used to deliver new learning material to students who have achieved understanding and remediation to those who have not. 53 This trend is facilitating less reliance on traditional learning providers and moves away from the one-size-fits-all model to optimize learning efficiency. 54

Examples

PLAiTO (https://www.plaito.ai/), a platform that enables teachers, schools, and publishers to provide such personalized learning at scale.

Axonify (https://axonify.com/) is a microlearning platform that employs AI technologies to deliver personalized learning solutions for businesses.

Adaptive learning systems are one way of delivering personalized learning and use a data-driven, nonlinear approach to instruction. This method, powered by AI technology, dynamically adjusts content to student interactions and performance levels, delivering the types of material in an appropriate sequence that individual learners need at specific points in time to make progress.



E-learning facilitated by hand-held devices, such as mobile phones is called "m-learning". There has been an explosion of mobile edtech platforms due to the ubiquity of the mobile device in modern life. These technologies offer communication channels via e-mail, access to the Internet, and voice and text messaging. The advantages that have led to the popularity in m-learning include: affordability of access for learning (mobile devices are less expensive than desktops) and instantaneous access to educational materials. Learners can share lesson plans, exchange advice, opinions, and tips, or immediately apply their knowledge. M-learning specifically accommodates employed adults looking to enhance their professional development and skill up and facilitates just-in-time and on-the-job training.⁵⁵

Examples

EdApp, a microlearning based LMS with an integrated authoring tool, delivery app, rewards & analytics - all designed for today's digital habits on mobile and web. Gnowbe is a micro-learning solution to train and update staff or students via smartphone.

The speed at which these trends are infiltrating the e-learning industry can be highlighted by the recent acquisition of software company Rhyme Softworks by the online learning platform Coursera. A new feature called "Coursera Labs" is powered by Rhyme technology, which allows developers to build hands-on, virtual e-learning projects. ⁵⁶ This feature will allow educational institutions and industry partners (corporate enterprises) to build their own hands-on learning projects across modality. This move by Coursera is reflective of the demand for more personalized and adaptive solutions sweeping the industry and the dominance of corporate investment in executive education.

The shift away from MOOCs and towards online accreditation is exemplified in Coursera's complete online degrees partnerships with accredited academic institutions including the Global Master of Business Administration (Global MBA) from Macquarie University, and the MSc degree in Innovation and Entrepreneurship from HEC Paris, one of Europe's leading business schools. This growth of e-learning and its legitimate disruption of traditional education systems is perhaps best demonstrated by The University of Illinois' replacement of their on-campus MBA with the fully online version powered by Coursera. ⁵⁷

METHODS, MODELS, AND PLATFORMS

The methods of effective e-learning vary across curriculum and are informed by the needs of the learners.

Strategies and technologies effective for creating successful e-learning environments can be visualized in the popular ADDIE model below. This model is an instructional system design process that includes the steps Analysis, Design, Development, Implementation, and Evaluation. ⁵⁸ The elements in this model are critical in building or leveraging an effective e-learning solution.

The ADDIE model for e-learning



Figure 5 Beatrice Ghirardini, E-Learning Methodologies: a Guide for Designing and Developing e-Learning Courses (Rome: Food and Agriculture Organization of the United Nations, 2011) ⁵⁹

Key tools for an effective e-learning environment are:

- Presentation tool: Used to create the look and feel of the course/program.
- Student tools: A selection of tools for communication, collaboration, evaluation, etc.
- Administrative tools: Used for delivering materials and tracking usage and progress.

Depending on the learning objectives and type of learners, one of these tools might be more critical than another, it is important to consider this when creating or leveraging an e-learning solution. Some of the most effective tools for interactions employed by e-learning solutions include scheduling, peer support, group discussions, messaging, voice boards, social media, and video conferencing. More autonomous students need some structure so that they can orient themselves, but they can be left to shape their interactions and choose their path. A branched structure

can address autonomy concerns.⁶¹ Rather than forcing everyone through a sequence of learning activities, branching out offers a possible structure to follow, but it still allows for experimentation and self-direction. Personalized learning is another method that addresses learning autonomy concerns.



Models

The primary models for e-learning can be broken down into Online Learning Platforms (OLP) and Learning Management Systems (LMS). Learning management systems are used primarily by traditional academic institutions and enterprises which, often consist of several robust backend features to host content (videos, assignments, files etc.) and often utilizing various delivery methods.















Blackboard



Popular LMS' in the United States



Online Learning Platforms

matrix, formal academic institutions including ly League Learning from Imperial College London. schools like Harvard and Cornell, have built out a variety of their own online learning offerings including single Other partnerships between academic institutions learning platforms to power their certificate offerings.

Highlights of academic partnerships with online learning platforms include Coursera's full MSc degree in Innovation

and Entrepreneurship from HEC Paris, the iMBA from the University of Illinois at Urbana-Champaign, and the Global MBA from Macquarie University, all powered by Coursera. Other full degree programs powered by Online learning platforms and online learning online learning platforms include a full Master of Applied communities have exploded out of the migration online Data Science from the University of Michigan and the and out of the MOOC trend. As visualized in the figure 6 University of Colorado-Boulder and MSc in Machine

credit courses, professional education opportunities and and online learning platforms stem from a wide range certificate programs in addition to offering MOOCs via of MOOC offerings. Online learning communities like various for-profit and not-for-profit partnerships. These Skillshare have partnered with academic institutions and academic institutions recognize the value in offering corporations to develop video content for its community non-degree certificate programs to a broader network of that bears significant weight and attracts subscribers professionals outside the market of traditional academia. (see figure 6 matrix). It is also important to note that the These asynchronous, certified non-degree programs majority of online learning platforms offer corporate team allow institutions to fill the void between traditional plans, in order to facilitate executive education in a more academic learning and adult learners, professionals informal way, readily accessible way. The partnerships looking to make a career pivot or executive professional between online learning platforms and corporations development sponsored by corporations. Traditional have exploded in the last few years, with the majority of academic institutions often leverage full end-to-end LMS online learning platforms offering corporate plans. This solutions to power their online learning efforts; however, shift is evidence of the notion that professionals in secure there has been a recent shift to partner with online jobs place less importance on upskilling via known academic entities or investing in certifications, but rather emphasize the importance and utility of the content as the main attraction of investing time in engaging with online learning platforms.

















Popular Online Learning Platforms

Other notable online learning platforms include Adobe's Education Exchange platform which is the free learning platform and community, designed by educators for educators, to ignite creativity in the classroom. This platform facilitates the use of Adobe tools in a classroom setting. MasterClass is another popular online education platform that allows students to access tutorials and lectures pre-recorded by experts in various fields. Outlier is a new online education platform that offers universitylevel courses, taught by celebrated educators in their respective fields via video module. Outlier was created by a co-founder of MasterClass and has partnered with the University of Pittsburgh to offer college credits upon course completion.

> The partnerships between online learning platforms and corporations have exploded in the last few years, with the majority of online learning platforms offering corporate plans.



Business models

Several online learning platforms offer subscription Most accredited programs offer a pay-as-you-go format Subscriptions provide members with monthly or annual paced or scheduled meeting times with teachers. access a wide range of individual MOOCs and video content on an ongoing basis. Notable online learning platforms and communities that have adopted this business model include LinkedIn Learning, Coursera, Learn@Forbes, Blinkist, Skillshare, MasterClass and others.

The freemium model is also a popular model used by online learning platforms. Non-profit organizations like edX and the Khan Academy offer the majority of their MOOCs and video series available for free. Frequently learners who would like their coursework "verified" with a certificate will pay a fee to receive a credential or official certification attached to their course. Examples of this include: Coursera offers "Specializations" which are a series of courses that helps the student master a skill. Udacity offers paid "Nanodegrees" which are credentialed, edX offers paid verifications for some of their single courses as well as "MicroDegrees" for both undergraduate and graduate students, Learn@Forbes offers paid digital marketing certificates and credentials with this non-subscription model course packages.

based models to both individuals and corporate teams. in a traditional multi-week style course for either self-

Figure 6 Traditional academic institutions online matrix contuinued Page 34

Tradition institution online matrix

North American institutions	Degree/Certificate	Learning management system (LMS)	Curriculum	Cost	Pacing	моос
HARVARD UNIVERSITY			Entrepreneurship course offering, fundamental business skills, framework for building and financing new ventures, Scaling Ventures - Prepare your start-up to scale in our live, interactive online classroom.	\$1050 - \$5000		Free Business clasess on HarvardX (powered by edX)
eCornell		canvas	Entrepreneurship Certificate: Assessing Start-up Viability and Funding Options, Pitching Your Business Opportunity, Protecting Your Interests, Financial Planning, Valuation and Dilution, Company Structure and Due Diligence Post-Investment Best Practices	\$3600		Non-Business classes on CornellX (powered by edX)
		ULTRA Blackboard Learn	Entrepreneurship Undergraduate Degree and Online Certificate	Varies		N/A
TOWNS OF THE PROPERTY OF THE P		Blackboard	Degrees offering both Undergraduate and Graduate level degrees in a range of both Business & Creative concentrations. Intersection of Creative & Business is M.A. in Creative Business Leadership	\$39,420		N/A
♥ NYU			Entrepreneurship & Technology in: Breakthrough Innovation: Strategies for Taking Your Moonshot, Fintech, Coding and Visual Analytics, Corporate Sustainability, Corporate Finance	\$2200 - \$3800		Non-Business classes on NYUX (powered by edX)
MICA MARYLAND INSTITUTE COLLEGE OF ART		idp international education. Specialists	Master in Professional Studies in the Business of Art and Design: Grow an art or design related business, or to be a dynamic creative manager working with or within a business. (*other Online Creative Degree programs include Information Visualization Online MPS, User Experience Design Online MPS)	\$37,500	faculty member holds a weekly live class delivered through Zoom These lectures are recorded for revisiting	Single course offering on Skillshare. Graphic Design Basics Class: Core Principles for Visual Design

Tradition institution online matrix

International institution	Degree/Certificate	Learning management system (LMS)	Curriculum	Cost	Pacing	MOOC
university of the arts london		Blackboard	4-6 Week "Short Courses" in range of fashion and design concentrations including: Fashion Figure Drawing, Technical drawing with Illustrator, Strategic Branding, Identity and Brand Experience; Package Design and Visual illustration	£360-500	Online Short Courses include; Live sessions with expert; Lesson recordings; Practical assignments; Personal feedback; VLE with course content; Forums for support; 3 months online access	N/A
HEC PARIS		coursera	Full MSc degree in Innovation and Entrepreneurship & Innovation Management & Entrepreneurship MasterTrack™ Certificate via Coursera	20,000 EUR	Students attend weekly live classroom sessions with professors, collaborate on group projects, and connect with instructors during live office hours.	23 Leadership and Management MOOCs on Coursera accessibile via standard membership
London Business School		Pearson Procession	The Entrepreneurial Edge - Intensive faculty- led-online masterclasses, industry expert online interviews & Founder's insights	£1850	12 week, Synchronous *Learning is online and interactive and happens across six phases	Single course offering on Coursera: How to Finance and Grow Your Start- up – Without VC
UNIVERSITY OF LEEDS		Future Learn	Short Course - Effective Fundraising and Leadership in Arts and Culture; Cultural entrepreneurship and new venture creation	Freemium - free for 4 weeks; \$99 for unlimited access + certification		

Figure 6 Traditional academic institutions online matrix contuinued



Online learning platform matrix

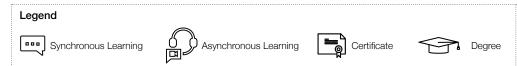
Online learning platforms	Summary	Creative curriculum	Entrepreneurship offering	Partnerhips	Cost	Method and pacing	Degree/Certificate	Corporate plans
Linked in LEARNING	Formerly Lynda.com - LinkedIn Learning offers video courses taught by industry experts in software, creative, and business skills. It is a subsidiary of LinkedIn.	Specific creative entrepreneurship classes include: Become a Music Business Entrepreneur, Running a Web Design Business: Defining Success, Planning a Web Design Portfolio: Growing Your Freelance Business	1400 courses on Entrepreneurship from "Setting Up Your Small Business as a Legal Entity" to "Entrepreneurship Foundations.	Various "SSO" (single-sign in) integrations with LMS platforms including: Adobe Captivate, Blackboard, Bridge, Canvas, Cornerstone, Degreed, Docebo, Saba, SuccessFactors, Workday	29.99 / month			
Forbes	An e-learning platform with collections of curated courses, along with Certification courses, offering upskilling training for business and marketing professionals to facilitate a new career move.	N/A	Digital Marketing in Search, Social Media, Digital Marketing in Strategy & Planning, Certified Digital & Social Sales, Social Media Stategist Exam Prep	N/A	\$19.99 Monthly Subscription (with one month free tril for 500+ courses) \$1495-1850 for certification courses			
Blinkist	A micro-learning app featuring audio and print summaries of non-fiction books, delivering the key takeaways from a book in about 15 minutes.	Some of Blinkists most popular creative titles include: 100 Things Every Designer Needs to Know About People, Building Your Business the Right-Brain Way, Innovation for the Fatigue, Unlocking Creativity - How to Solve Any Problem and Make the Best Decisions by Shifting Creative Mindsets)	Various titles about thriving on a shoestring budget, making your first million, and hiring right from the start. Select titles on user research, how to prepare a business plan and scaling your business.	Intergration with Evernote for note taking	\$15.99 monthly with 30 day free trial			
SKILLSHARE	Online learning community for people who want to learn from educational videos. The majority of courses focus on interaction rather than lecturing, with the primary goal of learning by completing a project.	1000s of video series in Creative fields from: Animation, Creative Writing, Film & Video, Fine Art, Graphic Design, Illustration, Music, Photography, UI/UX Design, Web Development	100+ video series on Freelance & Entrepreneurship for the Creative Fields, highlights include: Art of the Start: Turning Ideas into High-Growth Businesses, Make Creativity Your Career: Six Exercises to Create a Successful Side Project	Partnerships with established creative academic institutions MiCA, corprprate partnerships including Etsy, Society6	\$15.00 monthly with 60 day free trial			
coursera	An online learning platform that offers massive open online courses, specializations, and full degrees.	Various free courses, specialization, and full online degrees ranging from: Entrepreneurship Specialization (UPenn's Wharton Online) to full MSc Degree in Innovation and Entrepreneurship from HEC Paris, iMBA from the University of Illinois at Urbana-Champaign, Global MBA from Macquarie University	700+ Courses in the Arts from Modern Art & Ideas (The Museum of Modern Art) to Introduction to Classical Music (Yale University)	Credentials from top universities like Yale, Michigan, Stanford, and leading companies like Google and IBM.	7 day free trial, subscription between US\$39-79 per month	Various 'Learning Products' including free MOOCs, Specializations, Degrees and MasterTrack™ Certificates		

Figure 7 Online learning platforms matrix

Online learning platform matrix

Online learning platforms	Summary	Creative curriculum	Entrepreneurship offering	Partnerhips	Cost	Method and pacing	Degree/Certificate	Corporate plans
edX [®]	Created in partnership between MIT and Harvard University: edX is a not for profit massive open online course provider. It hosts online university- level courses in a wide range of disciplines.	Free courses inlcuding: UCSandiegoX Computer Graphics, NewCastleX Drawing Nature, Science and Culture. Micromasters Degree including: RITX Design Thinking degree.	45+ courses in entrepreneurship across institutions including: MITx "Becoming an Entrepreneur" & HarvardX "Entrepreneurship in emerging economices." Micromasters programs	edX has more than 110 partners, including universities, for-profit organizations and NGOs.	There is no cost to edX courses (audit track, no certificates.) A verified certificate for a course has a fees ranging between \$50 USD and \$300 USD	various programs and degrees including: MicroBachelors & MicroMasters Programs (Undergraduate-level and Graduate-level, for career advancement or a degree path), Professional Certificate (From employers or universities to build today's in-demand skills), Full Online Master's Degree (Top-ranked programs, affordable, and fully online) Global Freshman Academy and Xseries (Series of courses for a deep understanding of a topic)		
1 Udemy	Udemy is an online learning platform and teaching marketplace aimed at professional adults and students. Students take courses largely as a means of improving job-related skills.	500+ courses across creative fields including photography, UI/UX Design, Music, Fashion and Animation	100s of courses in Enterpreneurship Fundamentals, Start-ups, Buisness Strategy and Online Buisness courses, highlights include: The Complete Shopify Aliexpress Dropship course, Amazon FBA Courses, The Complete Buisness Plan Course, MBA in a Box etc.	Udemy has focused on attracting corporate trainers seeking to create coursework for employees of their company. Udemy also has over 4,000 enterprise customers and 80% of Fortune 100 companies use Udemy for employee upskilling (Udemy for Business).	Courses range from \$9 to \$300	hybrid learning, Udemy allows instructors to build online courses on topics of their choosing. Using Udemy's course development tools they can upload video, PowerPoint presentations, PDFs, audio, zip files and live classes to create courses. Instructors can also engage and interact with users via online discussion boards.		
UDACITY	An educational organization delivering MOOCs globally. It originally focused on offering university-style courses, it now focuses on vocational courses for professionals.	N/A	Udacity's content offering focus on tech and data related content. The Udacity school of business focuses on courses inlcuding marketing analytics, digital marketing and business analytics courses.	Udacity and AT&T announced the "Nanodegree" program, designed to teach programming skills needed to qualify for an entry-level IT position at AT&T.	200 courses are completely free (without certificate). Udacity's Nanodegrees, a microcredential exclusive to Udacity is completely paid. Nanodegrees range from \$199 to \$2400	Inlcudes technical mentor support, Personal career coach and career services		

Figure 7 Online learning platforms matrix continued



Online learning platform matrix

Name	Platform	Notes
Neil Patel @neilpatel	y	Offers classes in podcast form, 300K followers on twitter
Jason Stone @millionaire_mentor	0	No classes, but small doses of information and inspiration, 5 million + followers on IG
Grant Cardone @grantcardone	0	Hosts conferences and has IG following of 2 million +
Mari Smith @mari_smith	0	30k+ IG followers, offers free online learning
John Rampton @johnrampton	0	Offers free blog posts, has 45K+ IG followers
Jon Youshaei @youshaei	You Tube	IG and youtuber on marketing
Everette Taylor @everette	0	350k+ followers on IG, specific to art
Peter Voogd @peterjvoogd	0	250k + followers on IG, founder of game changers academy
Marie Forleo @marieforleo	0	500k+ followers on IG, lots of content on her site to learn
Natalie Frank @nataliefranke	0	50+ IG followers, free content and resources
Amber Lilyestrom @amberlilyestrom	0	100k+ IG followers, short content for ent and inspo
Melyssa Griffin @melyssa_griffin	0	50k+ IG followers, offers short content and paid classes

Figure 8 Entrepreneurial influencers matrix

Tradition institution online matrix

Name	Platform	Notes
Jade Darmawangsa	You Tube	250+K Youtube subscribers, videos on growth and social media
Gillian Perkins	You Tube	300k+ youtube subscribers
Philip VanDusen	You Tube	150k+ subscribers, buisness
Masters of Scale	Podcasts	
The Pitch	Podcasts	
Being Boss	Podcasts	
Creative Pep Talk	Podcasts	

Figure 8 Entrepreneurial influencers matrix continued

04 ENTREPRENEURIAL SUPPORT AND E-LEARNING

Online and physical support for entrepreneurs has been growing through the emergence of incubators and accelerators which overwhelmingly support entrepreneurs in the technology industries. Although incubators exist for other industries including makers, food and beverage, and other creative fields, resources are far less available. Fewer resources in alternative industries results in less opportunity for investment and available seed funding.

Major accelerators like TechStars and ERA do not presently offer online learning, digital courses, or have any formal partnerships with online learning platforms or LMS'. Existing services are offered in cohorts, working closely together for weeks or months at a time, and have brick and mortar locations, with structured curriculum/programming designed to gain a foothold in the market, gain traction, and investment.

There are many physical incubator spaces affiliated with academic institutions such as the Pace Lubin School of Business' Elab and NYU's Leslie Elab. They can be sector-specific or agnostic. Incubators also exist within corporations like Chobani focusing on food or institutions like New INC inside of the New Museum in Lower Manhattan. These are sector-specific or exist within Venture Capital companies referred to as Venture Studios to help control and diversify their portfolios. Few incubators are design-focused except for Designpreneur Program at FIT, Parsons Elab, New York Fashion Tech Lab, {CFDA Incubator}, and some have recently folded, including Pratt BF+DA Fashion Incubator, and Google's 30 Weeks founders program for designers.

Most incubator models are based on monthly real estate rentals, co-working membership or profit-sharing, making investments into start-ups expecting a return on investment.

There are very few online incubators or accelerators; examples are CofoundersLab and FoundersSpace. These examples don't offer e-learning but do offer what traditional incubators do around network, mentorship, and business templates.

In the e-learning space, there are a number of MOOCs and other entrepreneurial and business courses. The figure matrices 6,7,8 compares online accredited and non accredited entrepreneurial offerings.

E-LEARNING FOR CREATIVE ENTREPRENEURS

Accredited vs. non accredited

There are few companies addressing the needs of creative entrepreneurs with online programming. Universities offering accredited programs in a pay-as-you-go model include the Parsons School of Design MS in Strategic Design and Management degree which focuses on the business of innovation and design strategy. This program also offers many non-credit & certificate courses online through their continuing education division called Open Campus. Courses are long and short forms operating with on the LMS Canvas. They range from fashion and graphic business to sustainability and impact entrepreneurship.

The Savannah College of Art and Design has a variety of online programs including graduate level degrees in Creative Business Leadership (MA), Design Management (MA), Luxury & Fashion Management (MA) these online degrees are accessible 24/7 to students. Students complete assignments by designated due dates and participate in online class sessions, where they assess and critique work and expand upon discussion board postings. These creative management degrees are powered by Blackboard

Internationally, the University of the Arts London is a competitor offering a variety of 4-6 week non-degree (certificated) online "Short Courses" in range of fashion and design concentrations including: Fashion Figure Drawing, Technical Drawing with Illustrator, Strategic Branding, Identity and Brand Experience; Package Design and Visual Illustration. These are hybrid course with both synchronous live sessions with experts, lesson recordings, personal feedback; forums for support and a virtual learning environment powered by Blackboard. The materials can also be accessed 3 months after completion of the accredited short courses. The value in these short courses for creatives is the direct personal feedback and course material taught by acclaimed working creative professionals.

The Maryland Institute College of Art (MICA) also offers a full online degree program in The Business of Art & Design (Online MPS).

The University of Bocconi in Milan offers a MOOC on Coursera in Management of Fashion and Luxury income, listenership and tour profitably. NAM is powered Companies. The focus of this course is on the inner workings of fashion and luxury companies, understanding their brands, business models, international development, and product categories.

The Berklee School of Music's online learning arm, Berklee Online offers various undergraduate and graduate level degrees including: Music Production, and Music Business (BPS, MA), Master of Music in Film Scoring, and various certificates including professional and graduate level certifications to musicians. These certifications consist of 3-5 courses in the instrument or specialization. Berklee also provides a four course specialization to Coursera in "DIY Music" in addition to their own online learning platform.

Berklee also has the Berklee Institute for Creative Entrepreneurship (BerkleelCE) which prepares graduates to approach their careers entrepreneurially in the new music business. Their on-campus and online courses minor in creative entrepreneurship, research projects, and high school summer program provides educational opportunities for students to familiarize themselves with and practice the entrepreneurial process.

The New Artist's Model platform, is a non-accredited pay- their unmet needs. as-you-go model, offering online step-by-step business training program to support musicians in licensing their music, leveraging online tools like YouTube, leaning skills like strategy, and booking gigs to help artists generate by the content management system Kajabi.

The non-academic affiliated offerings to creative entrepreneurs on both Linkedln Learning, and Skillshare as highlighted in the figure 7 matrix (page 38) all have a smattering of individuals courses specific to the needs of creative entrepreneurs which are accessible with a subscription to the platform.

Highlights on LinkedIn Learning include:

Become a Music Business Entrepreneur, Running a Web, Design Business (Defining Success, Planning a Web), Design Portfolio (Growing Your Freelance Business).

There are various other offerings that focus on advancing technical and digital skills for creatives but few with a focus on entrepreneurship.

In the figures 6.7.8 matrices above, one can compare the types of offerings in the online entrepreneurial space and in the focus group syntheses (page 48-67) below, see primary research data describing how creative entrepreneurs and their service providers perceive online learning, their experiences with online programming, and

O5 WHAT WE HEARD: ELAB FOCUS GROUPS AND 1:1 INTERVIEWS

ELAB CREATIVE ENTREPRENEURS FOCUS GROUP

For the primary research of this report, we conducted two 1.5 hour focus groups in early December 2019. One was aimed at creative entrepreneurs, while the other was targeting industry and service providers. The individuals selected for one-on-one interviews, intercepts, and focus groups were screened in advance during a 15-minute phone call. Various stakeholders were targeted in the creative entrepreneurial ecosystem to better understand what the current drivers are, what are the unmet needs, desires, and trends.

Participants of the focus groups were prescreened and identified as creative entrepreneurs and industry professionals who described themselves as participating in these sectors:

- Incubator /accelerator leadership involved with curriculum building
- Academics involved with curriculum content for entrepreneurship
- Practitioners/academics involved with online curriculum building
- Teachers of non-accredited courses on platforms like GA or skillshare
- Influencers of Media- social media marketing who offer advice
- Academics teaching in Entrepreneurial accredited online programs
- Instructors in non-accredited online programs

Focus Group Results: Creative Entrepreneurs

The New School, University Center

Date: 12/11/2019 | Participants: 6 | Demographic: 25 - 35 years | Start-up stage: 0 - 5 years

All participants self-reported that they use the internet to do research or have participated in online or mobile courses around starting up a business, within the last two years.

Participant's background

Design Strategy

Video/Social

Product Design

Performance Art/Mix Media

Jewelry Design

Film

KEY INSIGHTS AND TAKEAWAYS

Overview

Focus group questions were geared towards understanding the needs and opportunities in the online education space (see appendix) serving creative entrepreneurs, from business skills to sector-specific unmet needs. Participants were given a workbook with some of the questions to fill out, the results are below.

Immediate Takeaways

- None were willing to pay for the knowledge that they can get for free; they feel they're great at search; if a platform was able to prove their value proposition (they were willing to pay)
- The concept of online mentorship was strongly appreciated and willing to pay
- They have not found an aggregated space online that caters to creative entrepreneurial needs (sector-specific
- None signed up for Linkedin Learning (dislike the interface)
- Embodied Learning, as creatives, there is an unmet need to apply/learning by doing
- For online it has to be entertaining
- They want to know credentials for the experts there is too much advice, not enough sector-specific
- They really want a community for peer-to-peer learning and mutual support ...a community they can lean on and post to

Current Market Blind Spots

Applying the learning

Information is out there, but applying the learning in the real world is tricky. For instance, someone can be well versed with business development by reading books and blogs, but when you really sit with someone in person (client); it can get difficult to turn it into a quantitative project. Perhaps an opportunity space for business coaching.

Advertising

Advertising, especially in the U.S. is really accessible, but what no one teaches you is how to sell your product/service strategically, what can be done beyond social media paid advertisements? How to really understand the algorithms. These marketing tools tend to make you think that you have a winning strategy, but probably we are leaning towards a losing strategy.

Philosophy of entrepreneurship

Philosophy of entrepreneurship; as much as we read about success and failure stories, there is no platform where a mentor can sit with you and go through your specific needs. These business models which aren't working well and probably are not relevant in the current market (Entrepreneurship journey should make you objective and step out of the game but it is hard).

Online education platforms

Online education platforms, accreditation is important but an expert with proven specific skills is way more valued, especially in the case of one-on-one mentorship. The trend is revolving around embodied learning beyond just online marketing or micro-content, such as by Nat Geo, 10 mins IGTV videos.

Online content access and e-learning related behaviors

Where do entrepreneurs get their professional, business, trends, and market content

Most participants expressed that their shared-trust depends so much on the context or the specific details that turn out to be useful - they tend to gather as much information as possible from different sites and then synthesize. For instance, YouTube is the number one, specially for creatives learning software or technology skills.

Membership/subscription for online course platforms

Most haven't taken a paid online course, they watch TED talks, MasterClass, and free content or courses form all the various platforms out there. A few participants have signed up for an online course but have never attended. These Entrepreneurs tend to actively not pay for anything unless absolutely necessary. Their journey revolves around what is the 'need' vs 'should learn' content.

Willingness and thresholds for paid online learning

The threshold of payment specifically for subscriptions depends on need and on time saved. In order to pay, the content has to be immediate to critical for their business needs /operations. Participants mentioned as long as there is a substantial return on investment, they would be willing to pay a monthly subscription. Trust has to be earned and validated by credible people teaching or advising/mentoring, who have done it themselves.

Platforms that resonate and why

These entrepreneurs shared positive feedback for classes like edX, NYU, MasterClass, etc.; simply to learn new things, develop breadth, and remain updated with market trends though only on-demand as needed and when they have the time. Though some felt the process of taking a class with a group of people could be more authentic and lively to learn on-site - in an entrepreneur's journey, return on investment is the priority. Their time is very valuable to them.

For online courses, participants felt that cost and reviews were the highest deciding factors when deciding to register.

Skills and content they seek

Participants have been out of higher ed for at least one year and some up to 15 years. Most expressed frustration with business courses just teaching broad strokes of content and not getting specific enough to their sector or exact business needs, specifically around legal and accounting/tax advice, and bookkeeping practices. Several expressed they take 15-30 min free meetings with many different lawyers or accountants, then piece together an action plan that does not always pan out to divert paying their hourly rate. Several paid for Legalzoom but eventually needed more specific support but found it very expensive and limiting to their growth. they felt strongly about wanting a solve for this dilemma.

The preferred style of learning

Participants mainly believe in visual and kinesthetic learning but also seem to have adopted different learning styles when necessary. They also learn from competitors, observing industry players and structures (Ex: what successful retailers use or do for advertising, purchasing, showrooms, buyers, wholesalers) but expressed the need for sector-specific "how-to" content around retail/wholesale practices specifically or around really how do social media and online marketing algorithms work.

Current gaps and opportunity spaces

service; over 50% were willing to pay between \$100- seems to be the hardest thing for them. 200.



were willing to pay between \$100-200

More than advising, there is also a need for learning the software or technology which is industry-relevant.

All participants expressed the overwhelming sense of isolation, having to do it all as solo-preneurs, burnout, and the frustration of trying to figure out how to scale to Here participants expressed the need for a business enable bringing team members on or paid consultants. model course for creatives, to understand how they What to prioritize and how to maintain momentum, work and could be applied. and time management got a lot of nodding heads and agreement. Legal and taxes was another big frustration as well as trying to gain meaningful followers without paying for them because it is not effective.

As creative entrepreneurs, they are accustomed to problem-solving but are really challenged by the amount

The concept of online mentorship was deeply of time it takes to gain financial stability. Many have taken Aggregated platform with list of tools needed per

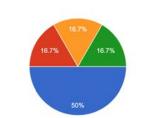
creative practice business practice

The one big wish revolved around money to correctly build a team (not buy equipment or inventory etc) so access to out-sourced cheap labor for office admin support or a bot that aggregates topline information from the internet that relates to their sector-specific needs as an advisor or mentor or for professional services.

On-demand for therapists could help with or mentor model for therapists to help with the stress of entrepreneurship.

appreciated across all participants - preference for side hustles from time to time to make ends meet, which industry with various software and templates to help monthly calls for specific needs as well as for substantial only exacerbates the length of time it takes. **Balancing** build out all the assets and peripherals they will need overall progress. All were willing to pay something for this their creative practice with their business practice, to start up from online marketing ad parameters, to physical pamphlets and line sheets, websites etc...onestop-shops.

If you don't but are interested what would you like to pay if at all? What's your threshold? 6 responses



9 \$10 - \$50 \$50 - \$100 \$100 - \$200 \$200 - \$400

\$10-\$50

\$50-\$100 \$100-\$200

Figure 9

Figure 10

Self directed

Accreditation/certification -0 (0%) Synchronous group with a live teacher Any other area of information (

please s...

Video content/format

Access to individual mentor



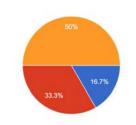


Figure 11

Which skills particularly are you looking to gain?

What are the most important traits you look for in an online course?

-1 (16.7%)

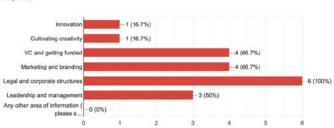


Figure 12

Page 54 Page 55

E-LAB INDUSTRY FOCUS GROUP

The New School, University Center

Date: 12/17/2019 | Participants: 5 | Demographic: 35 - 60 years | Years in industry: 5-30 years

Participant's background

Multi-media agency owner, customers include: Behance 99U conference

Longtime professional in the VC sector, MBA and volunteer at SCORE and NYC Innovation Collective

Lawyer with a customer base of solo and entrepreneurs/ a multidisciplinary creative and serial entrepreneur

Marketing and PR consultant to start-ups with expertise in the luxury consumer goods sector.

Longtime communication designer and agency owner who also advises start-ups/ PT teacher

Overview

The focus group was attended by service providers and industry experts who support service entrepreneurs and start-ups. They are also entrepreneurs themselves so they could answer from both perspectives. All questions were geared to help understand the needs of the entrepreneurs they provide services for and were geared to help us understand potential offerings for online creative entrepreneurship opportunities.

KEY INSIGHTS AND TAKEAWAYS

Immediate Takeaways

- The financial, legal tax was a black hole for them and their clients.
- Aggregator, connecting the dots, one place to go for everything that entrepreneurs need
- They are missing mentors in their business, and they are mentors themselves
- They tend to end up being 'life coaches' to the start-ups they serve
- Network pairing, business with creative
- Building on the 'Bumble for Business', community for creatives (Start-up tree, Fyre App for creatives, Shapr)
- As the economy shifts towards piecemeal work/freelancers/automated templates, the relevance of creative service providers is in the 'human factor,' identifying what they need even if they don't know what that is, 'we are their therapists', forensic uncovering
- Soft skills need help around communication skills, pitching their businesses, honesty, and transparency
- Online information needs to be presented in a visual way
- Content that they like should be digestible, hyper-relevant topics, turnkey ways to present them, accessible to chew on easily
- Applied learning I want to be able to apply this learning to my own business and there should be someone there to help me if I need it, either other students or instructors
- Influencer to communicate the information? Community, celebrity, comedian
- The Entrepreneurial Myth there is a sense of glamor around the freedom and creativity of being an entrepreneur but no one talks about the loneliness and prolonged hardship

Current Market Blind Spots

Unknown unkowns

The focus group spoke repetitively about unknown unknowns. Information exists on various websites for legal, tax, and other requirements, but in order to understand the information, you have to know what you need to seek. They felt like this was a black hole and the Entrepreneurship is very glamourized; no one talks about only way to learn these elements of their business was to the hard stuff. learn by error and learning after the mistake. These bits of information are related to both creative entrepreneurs and other entrepreneurs alike.

Cost and ease

Robotics (bots), automation, and AI are market entrants that are, in some form, disrupting their businesses as service providers. The group felt as though these are not competition because these technologies leave out the 'human factor' of real problem solving that the bots will not be able to calculate. However, they felt like these are essential issues to note due to cost and ease, which are highly regarded needs for entrepreneurs.

Experts are no longer experts

Creative agencies are now becoming everything to everyone, meaning you can go to one company who can provide services in tech and AI, with activations, and public relations, all under one roof. There are mixed reviews that experts are no longer experts and are forced

forced to try and expand their reach, while not providing quality services, but making it a secure one-stop-shop for new entrepreneurs.

Glamourized

Gig economy

After the 2008 crash, the gig and freelance economy grew, which has in itself formed a new niche of business needs. These freelancers have a lack of benefits, and usually a lack of time as they are required to do a lot more administration than they initially thought.

Platforms mentioned

https://ilovecreatives.com/featured-courses

https://www.lynda.com/Behance-training-tutorials/1968-0.html

https://envato.com/

https://www.youtube.com/

https://thegreatdiscontent.com/

https://www.lynda.com/ (linkedin learning)

https://99u.adobe.com/

https://www.fracturedatlas.org/

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E-learning related behaviours

- Where they get their professional, business, trends, and market content. Three mental buckets emerge in terms of how the participants get their news, starting with news about the world in general drilling down to industry/interest-specific. Among the top sources of overall business news were Bloomberg and AIGA.
- They rely on newsletters or websites that cater to their field for information and trends about start-ups, technology, fashion, or investing. Two participants mentioned educational institutions/incubator newsletters that pick up start-up news, which does not make it to the big outlets for example Urban-x, Cornell, New Inc (New Museum), and New Lab (NYU).
- For news about their specific industry (like music or events), they rely on word-of-mouth from their contacts and social events to hear what is happening within their niches. Another non-traditional source of news that was mentioned is communities like Reddit.

Trends in the entrepreneurial space

- Everyone is an agency, and start-ups are expanding into doing a bit of everything to give a sort-of full-service experience
- Start-ups need encouragement, support and an almost 'life coaching' and mentorship experience. They do
 not always know what they want or need so they like to have relationships with service providers who can
 also be mentors
- Three of the participants were creating workshops for entrepreneurs in the offline domain. While the content could be specific, like resume making, marketing or financials for pitching, the mentors mentioned that they focus on presentation skills, pitching, or confidence.

Platforms that resonate and why

- Coursera seems to be a favorite for a few respondents and also has a top-of-mind recall. Having a cohort/ discussion group is essential.
- Also a bonus is the availability of a mentor to reach out to and interact with if needed.

What makes for an excellent online course

- Format of the information should be 'bite-sized,' digestible, easy to chew on, turnkey way of processing the information
- Hyper-relevant topics
- Specifically for creatives visual learning, a format that can be applied to their own work immediately ("using my business as a case study")
- The cost was unanimously ranked as the most important factor in choosing a course. For this group, these courses came across as an "add-on which was good to have", rather than a necessity to compete in their market. The 2nd highest was synchronicity and the ability to run the course on your own timing and convenience.

Willingness and thresholds for paid online learning

• The general sentiment was to want to pay "as little as possible" for courses that one would take on their own time and initiative. Deals are something that a few respondents looked out for - for example, they will take a course if they think the value is worth \$600 but it is being offered for \$100.

Current gaps and opportunity spaces

Gaps observed by mentors in the start-ups they coach: Participants voiced that they help start-ups focus on interpersonal skills, presentation, and pitching skills. This seems to be a tricky domain to navigate for the mentors because they feel start-ups have a picture in mind of what they want but are open to advice if there is trust with the service provider. In terms of soft skills and team behaviors, there is a need felt to promote radical honesty and transparency in internal teams among start-ups, a notion of calling out negative feedback and emotions.

Legal and tax issues came out as a big challenge and that there is not much support in that area. Available resources are perceived to be inadequate: as

- a) Even lawyers do not know everything and,
- b) a sense that the same system is poised to gain if solo-preneurs do not have all the knowledge. There was palpable discomfort in the room when discussing legal notices from the government and a sense of helplessness to deal with them.

A need that was voiced was for a network that solopreneurs could tap into for resources/advice/support as and when they need it. This was also echoed in the lack of a **community or aggregate one-stop**, **go-to station** to find everything that an entrepreneur needs. A tie-in between business and creative - the business model and strategy. Knowing the business model and maintaining it long term, the business strategy - this brought out again the point of marrying the business and creative

The gap in terms of the format of courses - time-efficient, applicable. Can I learn the theory but apply it to my own business?

Throughout the discussion, legal issues kept coming up as a pain point for these respondents, so it is not surprising that it came out as the ranked number one topic for potential courses. Some of the respondents noted **marketing and branding** as reasons start-ups come to them.

How much on average do you think an entrepreneur is willing to pay for an online course:

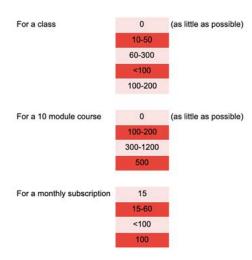


Figure 13

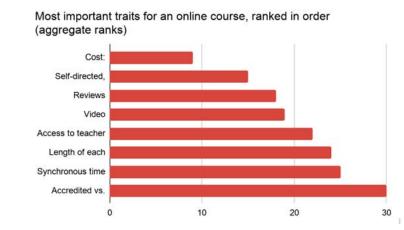


Figure 14

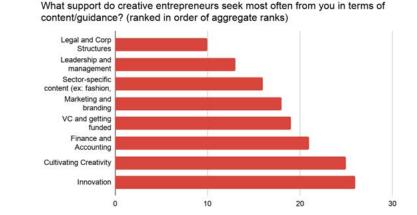


Figure 15

Figure 14

1:1 INTERVIEWS WITH CREATIVE ENTREPRENEURS

Interviewees: 5 | Demographic: | Years in industry: 0-15 years

Participant's background

Educational Technology- Start-up Ed

E-Commerce

Product

Ceramist

Technical Instructor online General Assembly

Overview

The 1:1 interviews were conducted via conference call to creative entrepreneurs, and industry professionals in the online education space. The discussions were geared towards understanding where they go to skill-up, how they feel about online courses, and what gaps they have in their businesses or industries.

KEY INSIGHTS AND TAKEAWAYS

Entrepreneurs

- Lack of courses and information in business law
- Subscription costs are preferred but ranked as lower in learning drivers
- Online communities are helpful for entrepreneurs
- free information when you are starting out is invaluable
- Influencers on IG and YouTube are helpful, but usually prefer in-person workshops
- Self-directed learning is preferred over instructor with a schedule
- Classes are valuable for things they do not do; they need to learn about PR or law, rather than film or design
- Hiring is a challenge, but due to the globalization of communication, it can make it easier from a finance perspective
- Free of information is preferred, a lot is out there, and it is difficult to understand the value of paid classes when so much is available for free
- Going to a physical place for the entrepreneurial community is extremely helpful, for classes or just meeting people

Industry Professionals

- The future is mobile-based "badged" learning, accreditation is less attractive these days with the growth of lifelong learning.
- Lots of people in the entrepreneurial space, but there is room for more, especially around soft skills.
- Online classes are often very dull, actual projects that are relatable are preferred
- Will only take courses from reputable rated instructors who can teach, their way of teaching and style has to click
- The interface should be comprehensible and have videos

Synthesis

- Online learning needs to be relatable to the viewer. Entrepreneurs want someone who is in their field or has done it before; this is inclusive of skill-building for their creative industry or something else like law or finance.
- Community is equally or more important than learning on its own. Entrepreneurs often feel isolated, which brings a lack of motivation, so being around or hearing about other entrepreneurs helps with re-gain momentum.
- There is much content out there that is free, and it is highly preferred. Content creators and educators need to have a following and proven record with reviews.
- Creatives want to know just as much about their industry as other aspects. Because they are not in finance or law, those are important to learn, and they want to.

The threshold of payment specifically for subscriptions depends on need and on time saved. In order to pay, the content has to be critical to immediate business needs / operations. Participants mentioned as long as there is a substantial return on investment, they would be willing to pay a monthly subscription. Trust has to be earned and validated by credible people teaching or advising/ mentoring, who have done it themselves.

06 CONCLUSION

Although saturated and sophisticated, the online education sector is set to grow in the coming years with the trends in distributed workforces, longer life expectancy, and needs for lifelong learning to keep up with technology's rapid advances.

OPPORTUNITY SPACE FOR CREATIVE ENTREPRENEURIAL E-LEARNING

There is an opportunity to enter into the entrepreneurial online education space in part because entrepreneurship is growing globally and also because they have sector-specific unmet needs. Women and solo-preneurs will be a growing sub-sectors to focus on. Gen-X-ers and Boomers are making up a large portion of this subset so finding them where they are, will be an important part of a marketing strategy.

We have found through our research that the creative entrepreneurial areas, have not been formally addressed when it comes to business education. This market includes those seeking to start-up in creative industries like home/fashion/jewelry accessories through e-commerce business models, along with multimedia arts, performance, and digital arts, architectural/interior design in the creative agency business model ,non-profit, and B-corp. models. The nuances and sub-sector specific needs and protocols, have not been well integrated into the traditional entrepreneurial e-learning content or courses.

DESIRABILITY

Unique Needs Of Creative Entrepreneur E-learners

There seems to be a gap in the affordable, non-accredited e-learning marketplace for creative entrepreneurs, a centralized place that blends the characteristics of an online business incubator, social networking platform with an e-learning on demand platform. An online community where sector-specific needs are integrated into the business rationale, and the ability to apply business techniques for growth or financial planning can be found for these striving creative business owners. Because many are solo-preneurs, at least initially, they are finding it hard to keep up with the needs and changing trends in business. Coupled with the accelerated pace of changes in their sector, this allows them little time to focus on business development, growth, and long term strategies. Although this is not a new problem for start-ups or entrepreneurs, their needs differ from other sectors that perhaps have not been so impacted by an accelerated pace of change or have access to potential networks of joiners. Joiners are initial founding team members like CFO, CTO's found quickly for scalable tech start-ups where they see the potential return for their investment of time (risk-return).

These entrepreneurs are busy growing a business integrated into already hectic lives. Most opportunity for investment and growth is found here because in part these learners have unique learning needs which have not been met and because various online tools have yet to be integrated to create a more seamless experience to facilitate on-demand learning. A platform that can aggregate trending content from across the web and offer customized learning options for a one-stop-shop will rise to the top. One that can support unique and aggregated video content, live stream or video conference, access to a community, through direct messaging, aggregate top line news, and be customizable by sector. The teachers need to be relatable, knowledgeable, and acclaimed in their specific sectors for them to be willing to pay for content. The possibility to have interactions with the teacher as well as peers raises the perceived value of online courses significantly. The content needs to have reviews to be trusted.

Life coach/therapist/community

Many creatives are either self-employed freelancers in the gig economy, either using it as a side hustle, or full-time. Adding to the pressures of doing unique creative work is the need to continually find work, manage clients, finances, and legal aspects. This is compounded by the pervading sense that entrepreneurship is a lonely pursuit. While they are indeed seeking business related skills and content, creative entrepreneurs sorely express the need for a life coach to guide them along their journeys as well as the needs for a trustworthy online/in-person community to learn from and connect with, similar to what is found in an incubator cohort or community.

Learning Format

The on-demand micro-learning is set to be the leading area for growth across all e-learning but most especially with creative entrepreneurs who seek information as they need it (on-demand) and on the go (mobile) not in long course formats and want to learn by applying content to their specific needs with support from experts. They also seek to learn peer-to-peer in community through forums, value networking, and with personalized sector-specific mentorship. The micro-learning and education in mobile format is trending and will continue to trend on platforms.

This format is also best aligned to their need for "bite-sized, digestible information on hyper-relevant topics." Couple this need with creative entrepreneurs' preference for visual, kinesthetic, and interactive learning, and any successful platform would have to deliver an engaging and technologically advanced user interface. Many potential users in this group are designers themselves, so this raises the bar for expectations from the platform experience in terms of aesthetics and intuitiveness.

In terms of content gaps in the marketplace for these creatives entrepreneurs seems to reside in practical application of business, legal, and tax needs and also for soft skills such as presentation techniques, selling methods or hiring techniques and pitfalls. They also seem to find a lack of resources that explain specific skills like online marketing.

The Future is mobile-based "badged" learning.

Accreditation is less attractive these days with the lifelong learning movement; online can't keep up."

He went on to add, "There are lots of people in the entrepreneurial educational space, but there is room for more, especially around soft skills."

-Ash Kaluarachchi Cofounder of StartEd and Producer of EDTECH WEEK

FEASIBILITY

Technology & Resources

The technology solution that would address all the features and needs of this creative entrepreneurial community would require development of an integrated omni-channel solution. This unique platform would need to stand out in the market place as a new approach to community, news, learning, and support.

There are many successful partnerships in online education, incubation space, as well as in the retail and creative sectors with popular "collabs". Creatives have come to appreciate this form of collaboration and strength in diversity and numbers and would perceive it to be relatable, therefore, have more value. A solution that meets their needs, that would catch their attention, and investment of time and money, would need to bring together strong market forces that are trusted in their separate sectors.

VIABILITY

The Business Proposition

There are already many well-positioned players and partnerships with established market share, so upfront marketing budgets coupled with strategic partnerships, will be necessary to rise above the noise to get noticed. Industry and social media-based influencers with large followings or pre-existing market share can become potential partners in the success of a newcomer into this well established yet fragmented and complex e-learning space.

There are organizations which operate in an online-only membership/subscription model in community for tech startups that help find collaborators, advisors, mentors, and resources through online accelerators/incubators. Others incubators which profit-share, use a hybrid of online tools and in-person methods of supporting entreprenaeurs but are also geared towards scalable tech start-ups. Both of these options are targeted towards scalable tech start-ups, not creative entrepreneurs.

There are few non-accredited and accredited e-learning programs that target creatives. The majority of these institutions utilize the pay-as-you-go model inline with most traditional academic institutions online offerings. Few accredited institutions have embraced trends in e-learning offering creative entrepreneurs with relevant coursework, community, and support in new and innovative models. (see figure 6 matrix).

Creative entrepreneurs, are leaning towards options, customization, and speed. When we asked about subscriptions vs. pay-as-you-go they all replied that prefer to have the choice and different tiers. They are willing to pay and some mentioned quite a lot, provided that it saves them time and creates value.

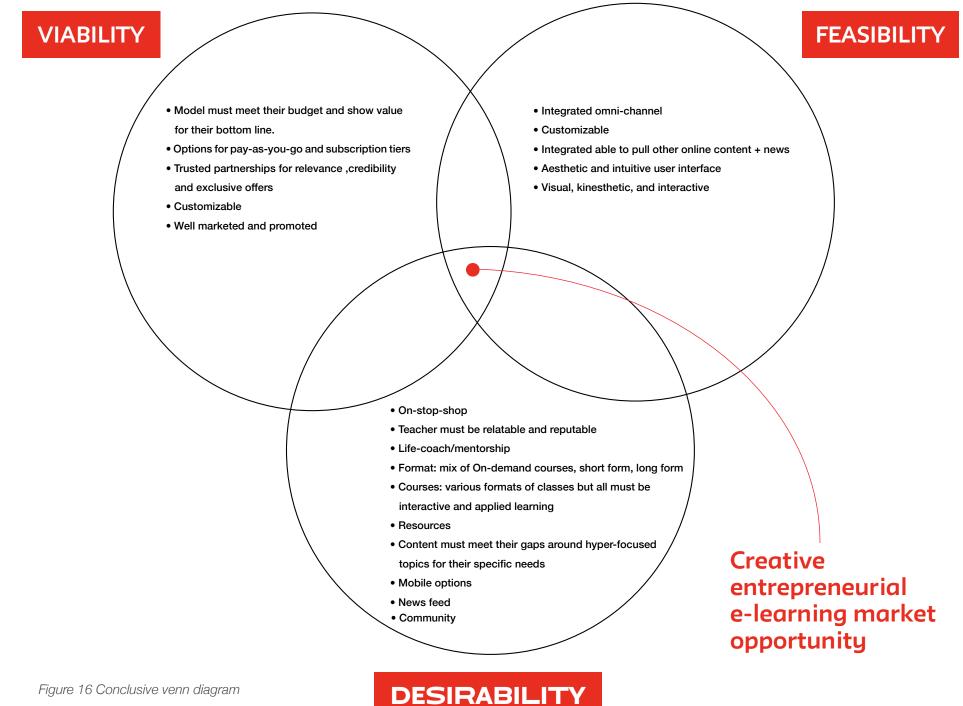


Figure 16 Conclusive venn diagram

Positioning a new subscription or freemium model offering that bridges the gap between business incubator, networking community, news source, and e-learning, one that shows empathy by addressing the unique needs of creative entrepreneurs is a business opportunity. However, doing it the same old way as others currently, will not be widely accepted by creative entrepreneurs. They seek a unique experience they can not currently find online, which is reflected in their current enrollment rates for such programs, or the lack of it. This unique platform must be well marketed online to rise above all the noise, be from a credible high-profile brand or collaboration/ partnership, nimble, on-demand, offer custom options, and have a valuable network. It must have an integrated and interactive interface, taking cues from how we live on social media platforms and aggregate the best business and sector updated content continuously to stay on-trend offering, in short, a one-stop-shop for the founder that can prove its value by saving them time and money and can also show its impact on their bottom line.

07ABOUT THE AUTHORS

Parsons Elab is a design-driven incubator and business lab dedicated to entrepreneurship practice and research at The New School. Founded in 2014 and directed by Professor Rhea Alexander. The Lab has published many papers on entrepreneurial education and distributed academic incubator models. It hosts workshops and panel discussions open to the University community, participates in the wider NYC Innovation ecosystem, and offers either 12 or 3 month business incubator for University alumni up to 6 years out from graduating as well as a mentorship program for long term alumni and those in the broader entrepreneurial ecosystem.

Rhea Alexander

Assistant Professor of Strategic Design and Management at Parsons School of Design Strategies. She is founder and Director of the Parsons Elab. She served as Co-director of the MS Strategic Design Program from 2014-2018. Prior to becoming an academic, Alexander was an impact entrepreneur for over 25 years having started up a sustainable wholesale lifestyle brand in the 1990's called DIGS and an online e-commerce store in the 2000's which was widely published and won acclaim and industry awards. During this time, she also consulted for NGO's and USAid as well and served as Director of Product Development for Hanover Direct. She holds a BFA in Environmental Design and a minor in Product Design from Parsons School of Design and an MA in Media Studies from the New School. She currently serves on the board of The NYC Innovation Collective, and several start-ups.

Krista Brown

Research Assistant at Parsons School of Design where she is completing her MS in Strategic Design and Management. She is a multi-disciplinary with 8 years of experience in the creative industries and has received awards in leadership, production, design, and activism.

Vasuta Kalra

Research Assistant at Parsons Elab and graduate student of MS Strategic Design & Management at Parsons School of Design. A strategist with over 7 years of experience in building brands and businesses, she is currently adding the design thinking dimension to her perspectives. She has led marketing for global retail and fashion brands and holds an MBA (Marketing Communications). She is looking to explore business innovation in the social and sustainability spheres.

Mckenzie Sullivan

Research Assistant at Parsons Elab and graduate student in Media Management at the New School for Public Engagement.

Surabhi Mittal

Research Assistant at Parsons Elab and graduate student of MS Strategic Design & Management at Parsons School of Design. Prior to her graduate studies, she created a personal brand 'Revived by Surabhi' to help niche businesses and individuals in Kashmir, India with cutting edge Product Designs services. Surabhi received an undergraduate degree in BA Product Design from Central Saint Martins at the University of the Arts London.

Heta Shah

Research Assistant responsible for graphics at Parsons Elab and graduate student in Strategic Design and Management at Parsons School of Design. A designer who keeps empathy at the heart of her projects and practices to address business challenges through design thinking. She is currently exploring areas of service and system design.

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APPENDIX

Industry

Creative Entrepreneurs

1:1 Interviews

References upon request

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Elab Focus Group 12/17 Industry

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GLOSSARY OF TERMS

Some relevant terms will be used throughout this report:

Andragogy the method and practice of teaching adult learners; adult education.

Asynchronous Learning Asynchronous learning involves coursework delivered via video, web, email and message boards. Students are able to digest the course at their own pace.

Ed-Tech is the educational technology that refers to both the technological tools and media that assist in the communication of knowledge, and its development and exchange. It also refers to the tools for student and curriculum management, learning management system (LMS) and education management information systems (EMIS).

E-Learning is learning using electronic technologies to access educational curriculum outside of a traditional classroom. In most cases, it refers to a course, program or degree delivered completely online. With recent advancements in computing technology industries within e-learning have begun to sprout: m-learning (mobile), t-learning (tablet), etc.

Heutagogy also known as self-determined learning, is a student-centered instructional strategy that emphasizes the development of autonomy, capacity, and capability learning with practices and principles rooted in andragogy.

Hybrid Learning A method that involves both synchronous and asynchronous learning that occurs through online channels without real-time interaction. Many hybrid learning models will include a blend of both asynchronous and synchronous online learning.

ILT (Instructor-led training) Instructor-led training, or ILT, is the practice of training and learning material between an instructor and learners, either individuals or groups

Learning management system (LMS) refers to the technical platform used to deliver educational resources. Ex. Blackboard. Coursera etc.

Massive Open Online Courses (MOOCs) refers to free online course aimed at unlimited participation and open access via the web. In addition to traditional course materials, such as filmed lectures, readings, and problem sets, MOOCs' content is often powered by traditional academic institutions

Ex. edX, Coursera, Udacity, Udemy etc.

Synchronous Learning Synchronous learning refers to a learning event in which a group of students are engaging in learning in real-time. One unique feature of synchronous learning are live chat or instant messaging features that allows students to ask their teacher or fellow students questions instantly. Live streamed video is also a tool employed in synchronous learning methods.



